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**Attn: Manon Delorme**

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The electronic mailbox is equipped to send an automatic reply to all messages received. If you do not receive an automatic response, please contact the Contracting Authority to ensure your bid was received. Please note that it is the bidder's sole responsibility to ensure that all bids submitted are received in their entirety by Citizenship and Immigration Canada by the closing date and time indicated in this RFP.

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**REQUEST FOR PROPOSAL**

**Proposal To: Citizenship and Immigration Canada**

We hereby offer to sell to Her Majesty the Queen in right of Canada, in accordance with the terms and conditions set out herein, referred to herein or attached hereto, the goods, services, and construction listed herein and on any attached sheets at the price(s) set out thereof.

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**Issuing Office – Bureau de distribution  
Citizenship and Immigration Canada  
Procurement and Contracting Services  
70 Crémazie  
Gatineau, Québec K1A 1L1**

<b>Title – Sujet</b>	
Helpdesk Service Tool	
<b>Solicitation No. – N° de l'invitation</b>	<b>Date</b>
CIC - 155593	August 30 <sup>th</sup> , 2023
<b>Solicitation Closes – L'invitation prend fin at – à</b>	<b>Time Zone</b>
3:00 PM on – October 23 <sup>rd</sup> , 2023	Fuseau horaire UTC-4 EDT
<b>F.O.B. - F.A.B.</b>	
Plant-Usine: <input type="checkbox"/> Destination: <input checked="" type="checkbox"/> Other-Autre: <input type="checkbox"/>	
<b>Address Inquiries to: - Adresser toutes questions à :</b>	
<a href="mailto:IRCC.BidsReceiving-Receptiondessoumissions.IRCC@cic.gc.ca">IRCC.BidsReceiving-Receptiondessoumissions.IRCC@cic.gc.ca</a>	
<b>Telephone No. – N° de téléphone :</b>	
<b>Destination – of Goods, Services, and Construction:</b>	
<b>Destination – des biens, services et construction :</b>	
See Herein	
<b>Delivery required - Livraison exigée</b>	
See Herein	
<b>Vendor/firm Name and address</b>	
<b>Raison sociale et adresse du fournisseur/de l'entrepreneur</b>	
<b>Facsimile No. – N° de télécopieur</b>	
<b>Telephone No. – N° de téléphone</b>	
<b>Name and title of person authorized to sign on behalf of Vendor/firm</b>	
<b>Nom et titre de la personne autorisée à signer au nom du fournisseur/de l'entrepreneur</b>	
(type or print)/ (taper ou écrire en caractères d'imprimerie)	
_____ <b>Signature</b>	_____ <b>Date</b>



## **Amendment 001 – RFP # CIC-155593**

### **Amendment 001 is raised to:**

- Extend the solicitation period end date from October 9<sup>th</sup>, 2023 3:00pm to October 23, 2023 3:00pm on the cover page
- Remove “Internet Explorer 11” and replace it by “Microsoft Edge or Chrome” in Section 5.1 Software requirements – Technical Environment of the Statement of Work;
- Remove “Firefox” in section 5.1 Software requirements – Technical Environment of the Statement of Work;
- Remove “Outlook 2007” and replace it by “Outlook 2016” in section 5.1 Software requirements – Technical Environment of the Statement of Work;
- Remove “XLS” format in section 5.1 Software requirements – Technical Environment of the Statement of Work and replace it by “XLSX”;
- Remove “The Solution must allow the client (IRCC) to retain an older version if a newer one is not compatible.” in Section 5.1 Software requirements – System Administration of the Statement of Work
- Remove “XLS” format in section 5.1 Software requirements – Reports of the Statement of Work and replace it by “XLSX”;
- Add business hours in Section 6.0 Deliverables of the Statement of Work
- Remove “ The solution must display email correspondences in the ticket history and in the native email platform (e.g. Outlook)” and replace by “The solution must be able to generate an email to forward client tickets to external clients without access to the solution”.

### **Appendix “D”, STATEMENT OF WORK is deleted in its entirety and replaced by:**

## **APPENDIX “D”, STATEMENT OF WORK**

### **1.0 TITLE**

Helpdesk Service Tool

### **2.0 OBJECTIVE**

The Department of Immigration, Refugees and Citizenship Canada (IRCC) has a requirement for a commercial off-the-shelf (COTS) solution for a Helpdesk Tool that will enable IRCC users to effectively and efficiently manage IRCC’s interactions with the public via its official social media channels.

### **3.0 BACKGROUND**

Immigration, Refugees and Citizenship Canada employs over 11,000 people at locations across Canada and abroad. The Department develops and manages policies and programs related to Canada’s immigration, refugees, citizenship, integration and passport programs.

IRCC manages several official social media accounts, and regularly interacts with stakeholders (clients, prospective applicants, representatives, Canadians, etc.) on these social media channels. The Department’s Social Media team responds to over 1,000



questions from IRCC clients on a weekly basis via social media and is seeking to expand on the extent of the client service it offers.

#### **4.0 SCOPE OF WORK**

The solution will consist of licenses, standard upgrades and fixes to the solution as they become available, and the provision of technical support to IRCC users.

The solution will be implemented in English and French to an initial batch of 25 users across IRCC's branches in National Headquarters (NHQ). In subsequent years, hundreds of users in IRCC NHQ may be using the Helpdesk.

Note that new requirements to the technical environment and security requirements may apply in the future, if the use of the tool extends long term and the scope of IRCC's solution is located on servers located inside of Canada.

The solution must at a minimum possess requirements as stated in the Mandatory Requirements.

#### **5.0 REQUIREMENTS**

##### **5.1 Software requirements:**

###### SOFTWARE AVAILABILITY

- The latest commercial release of the solution must be available by the contract award date.

###### TECHNICAL ENVIRONMENT

- The Solution and all stored data must be online and hosted on the Contractor's secure servers.
- The Solution must provide for real-time security monitoring and notifications to IRCC for security events.
- The Solution must permit auditing for selected user and administrative actions.
- The Solution must be compliant with the version of Microsoft Edge in use at IRCC - as well as future versions of Microsoft Edge and other internet browsers (e.g. Chrome).
- The Solution must use data information to and from (interoperate) with Microsoft Outlook 2016 and compatible with future versions of Microsoft Outlook.
- The Solution must allow use of files with the following formats for client interactions: jpg, pdf, gif.
- The Solution must allow use of files with the following formats for uploading or downloading of data: xlsx, rtf.
- The Solution must accommodate up to 200 concurrent licence users, should IRCC wish to expand the use of the tool.
- The Solution must have open API affordances and communicate with Chatbot (Artificial Intelligence).
- The Solution must have access to Facebook, enabling the ability to respond to Facebook comments on posts and messages on Facebook Messenger.



- The Solution must have access to WhatsApp, enabling the ability to respond to messages received via WhatsApp.
- The Solution should have access to Twitter API, enabling the ability to respond to Twitter Direct Messages (DMs) and Twitter mentions

## SYSTEM ADMINISTRATION

- The Solution must include secure password authentication.
- The Solution must host the latest version software, as long as it's compatible with other mandatory requirements.
- The Solution must permit IRCC Account Administrators to assign access rights to an individual staff member or group.
- The Solution must not allow operations to be performed within the Solution unless the user is authorized for the operation concerned.
- The Solution must provide the ability to control various types of user access rights capability:
  - Read: client interactions; metadata (tags, notes, timestamps, conversation history, Helpdesk user data, data/metrics, etc.)
  - Write: client interactions (draft responses, approve responses and post responses); metadata (tags, notes, etc.)
  - Manage: right to manage tags (add, create, delete), right to assign tickets to other users for approval, right to export conversations to external documents
  - Generate reports
  - Export data
  - Right to perform system administrator tasks.
- The Solution must permit IRCC Account Administrators to create and manage all staff member information that IRCC deems required for the establishment and maintenance of user accounts.
- The Solution must allow IRCC users to be organized and managed into groups if needed.
- The Solution must allow or be configured to allow IRCC Account Administrators to manage the structured keywords or tags that users may associate with records for easy identification, permitting Account Administrators to create, delete/archive, and rename keywords or tags.

## BUSINESS FUNCTIONALITY

- The solution must include or can be configured to include, standard fields for social media interactions:
  - Social media username (e.g. Twitter handle)
  - Channel of interaction (e.g. Twitter, Facebook) including the ability to create different groups within any of the channels
  - Ability to divide between groups across different channels
  - Conversation history between the social media user and IRCC
  - Ability to split comments and create a new ticket.
  - Metadata associated with the conversation history (e.g. tags, notes, timestamps, Helpdesk users engaged, interaction status, etc.); and
  - Public profile information, as provided by the social media user.



- The Solution must be able to receive triaged tickets from a Chatbot.
- The Solution must allow to tag and untag assignments, and data must be filterable and exported by these tags.
- The Solution must include an internal notes function that users can post against a record.
- The Solution must allow users to edit, create and associate at least 50 tags to each record.
- The Solution must be able to automatically re-assign enquiries from returning clients to the same Helpdesk user.
- The Solution must be able to communicate with email (e.g. Outlook) for customizable ticketing updates depending on account administrators preferences:
  - Send reminder that a ticket has been opened for longer than service standard or for any other specified reason by agent;
  - Send email when a new ticket has been automatically assigned or triaged from Chatbot; and
  - Send email when there are technical difficulties or system issues to all users with access to solution.
- The Solution must include real-time information on the time a ticket has been opened (i.e. assigned but not resolved by IRCC users).
- The Solution must maintain a database of all client engagements and transactions.
- The Solution must be compatible with Social Media Publishing Platforms.
- The Solution must allow the display of .jpgs
- The solution must allow for the creation of 'rules' in order to perform a series of actions or tasks on tickets that fulfill specific requirements and scenarios
- The solution must be able to communicate with agents using the following notification functions:
  - Email notifications
  - Mutable desktop notifications
- The solution must allow users to filter tickets by channels and tags
- The solution must be configured to allow users to manage and label spam or unsolicited messages
- The solution must allow users to associate tag(s) with a line of business
- For public comments and tweets the solution must link directly to the source on the native platform.
- The solution must contain functionality for linking and tracking tickets into trackers or categories
  - These trackers must be nameable, and must aggregate all tracked tickets in one place
- The solution must provide a 'history' for each ticket, tracking responses, notes, and other updates.
- **The solution must be able to generate an email to forward client tickets to external clients without access to the solution.**
- The solution must be able to update multiple ticket fields at once (e.g. bulk update)
- The solution must be able to order tickets by the following:
  - Date created
  - Last modified
  - And both must be sortable both ascending and descending
- The solution must allow filtering of all tickets based on:
  - Channel



- Creation date(s)
- Status
- Priority
- Tags
- Groups
- Contacts
- The solution must allow tickets to be reassigned to agents or channels natively
- When a ticket is created or updated, the tool must be able to automatically add a tag to it, based on various properties of the ticket including but not limited to:
  - Notes
  - Replies added with specific key words

## SEARCH

- The Solution must allow users to perform searches using fields such as:
  - Customizable date and date range
    - Limiting keyword and tag searches to specific time frames
    - Filters that show tickets by last modified, date created, ascending and descending
  - Type
  - Status
  - Social channels (Facebook and Twitter) and groups (within Facebook and Twitter)
  - Keywords and/or tags that can be stacked/excluded
  - Sentence / phrase
  - Social media username
  - Helpdesk user
  - Filtering tickets by assigned agent who closed the ticket
  - Filtering tickets by assigned agent who sent response
  - Line of business tag groups, and sub-groups
- The Solution's search function must allow users to search using full or truncated keywords or terms.
- The Solution must maintain a searchable database of all client engagements and transactions.

## USER INTERFACE

- The Solution must provide a web-based user interface.
- Helpdesk users must have the ability to view the following:
  - Open assignments:
    - List of all open tickets (i.e. unresolved client interactions)
    - Time elapsed for open tickets
    - Full interaction history and metadata (tags, notes, timestamps, etc.) for open tickets
    - Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag, etc.
  - All assignments:
    - Filterable through search, based on keywords, tags, notes, social media username, etc.



- Filterable by fields such as: Helpdesk user, ticket status, timeframe, platform, tag, etc.
- Filterable by social network, message type, assignment options (to, by, resolved by), etc.
- The Solution must permit the use of the complete English and French language character sets.
- The Solution must be screen reader friendly using assistive technologies such as screen magnifiers, text to speech and sound icons.
- The Solution must allow the Client to work in the official language of their choice: English and French (including viewing all screens, collecting responses and accessing technical support).

## REPORTS

- The Solution must allow users the ability to customize, generate, and download reports so that they can be run from within the system within a specific date range:
  - Assignments with specific tag(s)
  - Assignments resolved per individual
  - Assignments created per 'group'
  - Assignments resolved per 'group'
  - Pickup/handling time per individual, team and/or with specific tags within a specific date range
  - Average resolution time/ration per individual, team and/or with specific tags within a specific date range
  - Inbound message topics (based on social media user metadata)
  - Timeframe
  - Key words
  - Aggregate vs. individual data

The Solution must be able to generate and store both standardized and ad hoc reports.

- The Solution must allow users to generate reports based on the previous 180 days (minimum) of data/transactions.
- **The Solution must allow, or can be configured to allow users to export reports at a minimum in xlsx, pdf and doc.**

## 5.2 Documentation, training, support services:

### DOCUMENTATION

- The Contractor must provide user manuals in both official languages. Where only one language currently exists, texts can be provided to the Client by the Contractor, resulting in the Client conducting in-house translations.

### TRAINING

- The Contractor must provide up to three user training sessions for the Client (per contract year), at the request of the Client.



- The Contractor must provide up to 6 hours of training for System Administrators, End Users and Technical Support resources, as required by the Client. Training can be provided on-site or remotely via internet meeting.

**SUPPORT SERVICES**

- The Contractor must have a dedicated account representative and provide web-based customer support; online tracking of customer support requests which identifies the problem, date created and response; and ability to view status of customer support requests.
- The Contractor must provide technical support 5 days a week via telephone or e-mail from Monday to Friday during standard business hours.
- Technical support must have a guaranteed response time within 1 business day of requesting help during standard business hours.
- The Contractor must provide a 48 hour notice of a planned outage and within 1 hour of any unplanned outages.
- The Solution must be online and functional 99% of the time.

**6.0 DELIVERABLES**

Activity/Deliverable	Associated Schedule	Format
Launch Meeting	Within 48 hours of contract award	In-person or by teleconference/web conference
Account setup	Within 48 hours of contract award.	Online (via the solution)
User Guides: <ul style="list-style-type: none"> <li>▪ Administrator Manual</li> <li>▪ User Manual</li> </ul>	Within one month of contract award	Online (via the solution)
Ongoing support	5 days a week Monday to Friday during standard business hours (Monday 9:00am to Friday 5:00pm)	Online (via the solution or email)

**7.0 MEETINGS**

The Contractor will be required to attend meetings in person or by teleconference/web conference with the project team as required, including conducting training sessions.

**8.0 TRAVEL**

Canada will not pay for travel or living expenses associated with performing the Work. Travel expenses, if any, will be the sole responsibility of the Contractor.





## **9.0 CONSTRAINTS**

The Contractor will not be able to begin the technical implementation of the solution until the IT Privacy Impact Assessment and Security Assessment and Authorization (SA&A) are completed by Canada.

## **10.0 CLIENT SUPPORT**

IRCC will provide the following as required for the completion of the work under the Contract:

- Telephone or web-based remote access to the IRCC Project Authority and/or IRCC's personnel as required for off-site Service delivery and meetings for the successful provision of the solution;
- Access to relevant documentation and reference materials to which the Contractor would not otherwise have access, based on the need to know principle;
- Review of reports/submissions, as required, and the provision of comments/suggested revisions, in a timely manner;
- Coordination of activities and responses from the areas within IRCC to enable the Contractor to provide Services, as these relate to issues identified by the Contractor;
- Communication with the Contractor and/or other IRCC stakeholders of IRCC Contract roles and responsibilities and internal work processes within IRCC;
- Negotiation and establishment of any Changes in scope, work or fees that result in an adjustment to the Contract in conjunction with the Contracting Authority;
- Provision of all necessary data to support transition to the solution;
- Appoint an Auditor for the purposes of determining compliance with the terms and conditions of the contract between the IRCC Project Authority and the Contractor;
- Provision of guidance to the Contractor, where possible and upon request, with respect to the Contractor's obligations in relation to the privacy legislation, regulations, and policies of Canada; and,
- Other assistance and support as appropriate.

## **11.0 Diversity**

IRCC is committed to making our Department more inclusive for everyone and fostering an equitable workplace culture that values diversity and creates an environment that is welcoming and rewarding for all. We encourage the businesses that work with us to reflect these values. More information can be found at:

<https://www.canada.ca/en/government/publicservice/wellness-inclusion-diversity-public-service/diversity-inclusion-public-service2.html>

**ALL OTHER TERMS AND CONDITIONS REMAINS THE SAME.**