

Pre-bidding Conference Minutes
RFP: e-Forms Processing System for the National Bureau of Statistics

25 February 2010, 11:00
UN Conference Room

Agenda of the day:

1. Short introduction on RFP purpose
2. Qs & As

1. SHORT INTRODUCTION ON RFP PURPOSE

Purpose: - selection of one company for development of the system form collection and processing of statistical electronic forms from statistical respondents (from now on "e-Reporting"). The system that is a key part of portal of National Bureau of Statistics (NBS), comprising several implementing stages. The first stage is to select / create a portal platform and build an e-Reporting system on its foundation.

2. Qs & As

Question: When will all 5 export formats for electronic reporting system be available?

Answer: The 3 export formats are already available on the NBS webpage, the link is provided in the Technical Specifications. Other 2 will be available on the same link next week.

Question: Please specify what language must the system support? Point 9.7 of the Technical specifications states that 2 languages must be supported and 9.4 states only Romanian.

Answer: The system must support two languages: Romanian and Russian.

Question: Could you please elaborate on "Standard, industrial solution, proven by time and big customers base, having implementations with large number of users" (point 7.2.1)?

Answer: The minimum requirements are as follow:

- at least 3 years of active usage;
- at least 5 public authorities/ countries/ organizations/ companies-customers;
- at least 50 thousand active users.

Question: The several requirements as they are formulated seems to be oriented to one specific supplier –IBM that have all requested features built-in. Is it possible to remove from the TOR such requirements? Examples: API, XForms, "modern graphical toolset"

Answer: API (application programming interface) as a standard attribute of any IT system used to enable interaction with other software; XForms is the open industry standard supported by all major vendors; graphical toolset for e-forms design is not a proprietary feature of a single vendor but a modern and simple way of allowing the customer to design forms without using programming. There are several industrial systems besides IBM, like Oracle, SAP, Sun, MS Share Point, Biztalk (as well as from less known actors) *etc* which satisfies TOR requirements. As such, these requirements could not be removed from the TOR. To further enlarge number of available solutions, beside open industrial W3C standard of electronic forms XForms, the proprietary format Adobe PDF will be accepted. The corresponding parts of the Request For Proposal should read as follows:

7.1 Functional requirements

[...]

7. Integrated platform for electronic forms:

- a. Mandatory support of one of the industrial standards for e-forms, such as: W3C XForms open standard or Adobe PDF;
- b. Native support for open standards, such as XML, XML Schemas, etc;
- c. Support for dynamic data integrity check and format validation during the data entry;
- d. Ability to define formulas for fields with automatically calculated values;
- e. Support for building convenient user interface by including navigational elements and using of data-driven wizards;
- f. Visual tools for rapid form development and debug, with support of WYSIWYG and drag-and-drop;
- g. Mandatory support for fill-in electronic forms on-line by using a standard web-browser without installing additional software and/or browser plug-ins on user's computer;
- h. Digital signature support:
 - support both for PKI and for shared-secret digital signatures;
 - ability to sign the form, including data, presentation and logic using web-browser;
 - provision for signing a whole form or its parts, including overlapped sections;
 - automatic signature validation using web-browser;
- i. Application Programming Interface (API) to manipulate electronic forms programmatically in custom applications;
- j. Ability to print e-form directly from web-browser with the preservation of design elements, formatting and styles exactly as in form's on-screen presentation;
- k. Support for integration with back-end, content management systems, databases and middleware;

9.2 E-forms

Electronic forms for statistical reports and questionnaires must be based on an industrial standard for handling of e-forms, such as: W3C XForms open standard and Adobe PDF.

The development of electronic forms must be performed by modern graphical tools which allow developing presentation (WYSIWYG), navigational elements, automatically calculated fields and rules for logical validation of data integrity. Such tool has to include an integrated testing environment to simplify electronic form debugging.

The process of data entry must be preformed on-line by using standard web-browser without requiring users to install any additional software and/or browser plug-in(s) on user's computer. Data validation must be performed

automatically while the user enters data and in case of any error(s), invalid fields have to be highlighted and explanations have to be provided. While working on-line, users must be able to print out the form, by preserving of design elements, formatting and styles exactly as in form's on-screen presentation;

Electronic forms, as well as development tools must provide support for digital signatures, including both PKI and shared secret infrastructures. Creating a digital signature should be performed by using a web-browser – users should be able to sign a whole form, parts/overlapped parts of the same form, including presentation, data and logic. Users must be able to perform automatic signature validation for selected form using web-browser

It is mandatory to provide an API to manipulate electronic forms, including presentation, data, logic and digital signatures in order to integrate electronic forms with custom applications.

Question: Why the TOR requests to build the system on "industrial integrated portal platform" platform?

Answer: According to the draft Technical Concept of Information System of the National Bureau of Statistics the developed system will be quite complex therefore it is preferably to be built on industrial integrated portal solution. The original developed system based on well grounded solutions with proven exploitation results proposed by companies could be accepted.

However, there are many examples when partial financing from different donors led to creation of many isolated SW applications not very well integrated and with short lifetime. Maintenance of separate applications and systems implies higher costs and potentially higher security risks.

This is why having a limited IT budget not sufficient for creation complete integrated IT system immediately (which imply high costs and many years), BNS has set two main deliveries in the announced tender:

1. Industrial integrated portal platform
2. E-Forms Processing System

Portal will serve as presentation and integration platform for E-Forms application and future applications to be created in BNS that will replace legacy applications. Modern three-tier architecture was chosen with web presentation level based on pure browser solution. BNS follows here the global trend to use integrated enterprise portals with one-stop authentication, uniform access to applications, and efficient content management as the best tool to integrate enterprise applications and provide a productive and complete environment to users.

To ensure for the new IT system of BNS long lifetime, sufficient scalability and security the portal platform should be integrated, multiplatform and mature on the market

Several web portal platform implementations from IBM, Oracle, SAP, Sun, MS Share Point, Biztalk (as well as from less known actors) exist on the market that satisfies the requirements.

Question: Would you elaborate the evaluation criteria "Is the scope of task well defined and does it correspond to the TOR?" (pt. 26)? If our proposal doesn't include an industrial solution will it be disqualified?

Answer: The industrial platform included in the proposal will be an advantage, and lack of such solution will not disqualify the offer.

Question: Why are x-forms and integration with corporate messaging servers (Microsoft Exchange, Lotus Domino) required? Should it be included in the financial proposal?

Answer: XForms is the open industry standard for electronic form. Now it is one of two accepted formats, see the answer above. Microsoft Exchange and Lotus Domino are two leading enterprise mail servers

with combined market share ~90%. (MS Exchange ~48%, Lotus Domino ~40%, Independent consultant: GARTNER GROUP, 2009). At the moment neither MS Exchange, nor Lotus Domino is used. It is seen as possible future development. Possibility to integrate the portal platform with both is mandatory. No, the financial proposal should not include cost of either Microsoft Exchange or Lotus Domino.

Question: Why in this RFP the selection/creation of Portal platform is necessary (p.18 RFP)

Answer: The e-Reporting is just first "brick" in the Metadata Based Information System of the National Bureau of Statistics, therefore the Portal platform could be the basement for further development. Also see answers above.

Question: Is the definition of E-Form correct and full (p.20 RFP)?

Answer: This is a short definition of electronic form in a context of statistical activity.

Question: Why are graphic tools required? Could a simpler process sufficient? (P.29 RFP)

Answer: WISYWIG tools greatly simplifies form design:

- the same tasks can be performed by less experienced staff;
- the number of human mistakes is significantly decreased;
- development goes faster;

According to RFP, further development of new statistical forms will be carried out by BNS staff with a little or no IT-background, meaning also more independence from external Supplier and less cost for support and further development.

Question: Why is data entered only through selection from the list (Page 30 p.6.2.3)? Could some data be entered manually?

Answer: NO, selection from the list is mandatory, as it eliminates typos. User simply selects item(s) from pre-populated list.

Question: Regarding the fact that the screen form should preserve the print out exactly, could we propose a screen form that varies from the print out, in case if this is more user-friendly (Page 30 p.6.2.3)?

Answer: General requirement – the preference will be given to the functionality of the same look of screen and printed forms. The printed form should look consistent in terms of graphics, proportions, styles, fonts, etc.

Question: Could you please specify the period of validity of proposals?

Answer: Proposals shall remain valid for sixty (60) days after the date of Proposal submission, as indicated in the pt. 12 of the Annex I.

Question: Please indicate if the forms filed online by the respondents have to be identical with the hard copy? Could they be modified in order to increase the usability?

Answer: Usability of electronic form is very important, as it facilitates the data entry process. However, keeping similarity with a hard copy would be an advantage. Users are accustomed with the existing hard copies.