

**FORM N(R2): NON-MANDATORY REQUIREMENTS**

Instructions for filling out Form N(R2): Non-Mandatory Requirements

1. Complete Form N(R2): Non-Mandatory Requirements
2. Follow the proposal instructions in the Proposal Instructions section below

**PROPOSAL INSTRUCTIONS**

1. **For each Non-Mandatory requirement indicate which Proponent response code that best describes your solution:**

**Y – Available Out of the Box:** the solution for the requirement is currently available in the existing product “out of the box”. Configuration may be required to enable the feature (requirement will be met through changes to settings of tables, switches, and rules without modification to the source code). Requirement is installed and operational at other sites and can be demonstrated to the City of Winnipeg.

**C – Available via Customization:** the solution for the requirement is not currently available in the existing product “out of the box”, but may be incorporated via customization of the solution components. Requirement will be met through changes to the source code which would require analysis and reapplication during updates, upgrades, or when applying software patches.

**F – Future Availability:** the solution for the requirement is not currently available, but will be available in an upcoming planned product release. If this option is indicated, include the date/timeframe when the requirement will be available for implementation, which should be either:

- a. A planned release up to **3** calendar months after the RFP.524-2020 competition close date, where an additional Proponent response code of 3 should be provided;
- b. A planned release up to **6** calendar months after the RFP. 524-2020 competition close date, where an additional Proponent response code of 6 should be provided, or
- c. A planned release up to **12** calendar months or longer after the RFP. 524-2020 competition close date, where an additional Proponent response code of 12 should be provided.

**3 – Third-Party Supplied:** the solution for the requirement is expected to be met by using a third-party vendor’s existing product, either integrated or non-integrated.

**N – Not Possible:** the solution for the requirement will not be provided by the Proponent.

Notes:

1. An omitted response will be assumed to be the same as a response code of “N”.
2. Any deviation from the response code will be re-coded at the discretion of the City of Winnipeg

<b>Non-Mandatory Requirements</b>		
<b>General Requirements</b>		
<b>Requirement Description</b>	<b>Requirement Category</b>	<b>Proponent Response (Y, C, F, 3, N)</b>
Should provide the ability for the Manager of department or portfolio manager to assign a priority to a project based on user-configured prioritization formulas (e.g. return on investment, anticipated benefit), so that he/she knows which projects to select or when to schedule a project if resourcing is constrained	Portfolio Management	
Should provide the ability to attach goals to a portfolio of projects and ability to report on progress against those goals as projects in the portfolio are delivered. Example: Goal is to increase residential waste diversion to 50% by 2024. Projects contributing to this goal are: introduction of composting program; introduction of penalty to increase the cost of overages on allotment of waste; introduction of recycling of additional types of plastics	Portfolio Management	
Should provide the ability to calculate and display ratios of budget for groupings of projects within a portfolio. Example: 30% of budget for projects in Portfolio X is for enhancements, 40% is for maintenance/ KTLO, 30% is for return on investment.	Portfolio Management	
Should provide support for both waterfall and agile project management methodologies. (Please describe how your solution supports both methodologies and be prepared to demonstrate). Note: It is not a requirement to maintain requirements, user stories, or product backlog items in the solution.	Task/ Project Management	
Should provide the ability for any team member to add tasks to projects they have been assigned to, regardless of project management approach (agile, waterfall, etc.)	Task/ Project Management	
Should provide the ability for a Project Manager (PM) to define rules for task assignment, so that if the PM chooses, team members can reassign their tasks to other resources	Task/ Project Management	
Should provide the ability for a project manager to be able to estimate duration of tasks for a given % allocation, e.g. if a resource is assigned 50% to a task, it will take the resource 3.5 days.	Task/ Project Management	
Should provide the ability for a project manager or system administrator to configure how team members record percentage complete (e.g. can select only 0%, 25%, 50%, 75% or 100%, or can enter an actual amount)	Task/ Project Management	
Should provide the ability for a project manager to take a baseline snapshot of my project so that he/she can compare actual progress to plan.	Task/ Project Management	
Should provide version control capabilities for documents	Task/ Project Management	

Should provide the ability for a project manager to set dependencies between tasks in a project plan, so that he/she can see the critical path in a project and so that he/she can take corrective action if tasks on the critical path are late	Task/ Project Management	
Should provide the ability to automatically define priority of tasks for team members based on such things as whether task is late, due soon and/or on critical path.	Task/ Project Management	
Should provide the ability to define relationship between projects so that the output of one project is an input into another	Task/ Project Management	
Should provide the ability to notify or alert the project manager when a change in the upstream project schedule could impact the downstream project manager's project	Task/ Project Management	
Should provide the ability to create/configure multiple project dashboards for a project	Project Dashboard	
Should provide the ability to restrict access to dashboards based on role	Project Dashboard	
Should provide the ability for a team member to configure their own dashboard, including charts and sorted/filtered views	Project Dashboard	
Should provide the ability to add external web content to a dashboard. For example, embedding a streaming video hosted on the internet.	Project Dashboard	
Should provide the ability to indicate a resource's availability for project work, since some resources may need to support operations and are not available 100% for project work	Resource allocation	
Should provide the ability to indicate vacation time, training, and statutory holiday days which take away from resource's availability for project work, so that resources aren't overallocated	Resource allocation	
Should provide the ability for resource managers to assign resources to non-project work, e.g. performance management, regularly recurring operational tasks	Resource allocation	
Should provide the ability for a project manager to foresee resource shortages for resources in particular roles/with particular skillsets before detailed estimates and resources are committed to the project.	Resource allocation	
Should provide the ability to create different "what if" scenarios to plan out or update schedules for a grouping of projects, so as to optimize resource usage, respect project dependencies and priorities, and meet critical project delivery dates	Resource allocation	
Should provide the ability to see project priority across a department or enterprise within the same view as resource availability by skillset or role, so that it is possible to identify availability and reassign required resources from low-priority to high-priority projects	Resource allocation	
Should provide a mechanism for resources to declare and update their skills as listed in the solution. For example, after a resource has taken training on programming language X, the resource can record in the solution that they now have beginner-level knowledge in programming language X.	Resource allocation	

Should provide a mechanism for resource supervisors to validate any skill updates made by the resources that report to them. For example, after a resource has recorded in the solution that they now have beginner-level knowledge in programming language X, the supervisor can validate or approve this change.	Resource allocation	
Should provide the ability for resources to record time against projects/tasks, OR solution integrates with time-tracking tools, e.g. Harvest	Timekeeping	
Should provide the ability for a project manager to define how team members track time for a given project: <ul style="list-style-type: none"> <li>a. At the project level; OR</li> <li>b. At the level of the phase/ type of task (e.g. design, development, testing, meetings)</li> </ul>	Timekeeping	
Should provide the ability for resource, portfolio, or project managers to view and report on the number of hours resources have worked on particular projects for user-selected time periods (day, week, month, year, from/to dates)	Timekeeping	
Should provide the ability to automatically copy project information from one project to another based on project events (e.g. project request is approved, and then project documents are automatically populated with data from intake form)	Automated Workflows	
Should provide the ability to modify, add or remove project information to tailor a project after it has been created using the standardized templates.	Configurability	
Should provide the ability to identify what data must be available on the intake form to create a new project (i.e. required fields to create the project)	Configurability	
Should provide the ability to make a change to a project template and apply that change automatically to any existing projects created previously with that template	Configurability	
Should provide the ability to pull in financial information from PeopleSoft Finance	Integrations	
Should provide the ability to integrate with PeopleSoft HR, so that resource can enter vacation time in one place only	Integrations	
Should provide the ability to integrate with common collaboration tools (e.g. MS Teams, Slack)	Integrations	
Should provide the ability to integrate with the project management features of Microsoft Team Foundation Server/DevOps	Integrations	
Should provide the ability to integrate with project management features of Atlassian JIRA	Integrations	
Should provide the ability to integrate with source control features of Microsoft Team Foundation Version Control (TFVC)	Integrations	
Should provide the ability to integrate with source control features of Git	Integrations	

Should provide the ability to integrate with the testing features of Microsoft Team Foundation Server/DevOps. <b>Examples include linking/updating tasks (testing performed, bugs fixed, etc.) from the testing tool with tasks in the project management tool so that updating one automatically updates the other.</b>	Integrations	
Should provide the ability to integrate with the testing features of Atlassian Jira/Xray. <b>Examples include linking/updating tasks (testing performed, bugs fixed, etc.) from the testing tool with tasks in the project management tool so that updating one automatically updates the other.</b>	Integrations	
Should provide the ability to integrate with other project management tools such as MS Project	Integrations	
Should provide the ability to take external project data and upload it into a consolidated project portfolio view either via a data upload or standard update input form. <ul style="list-style-type: none"> <li>a. Can capture the most recent information on current projects</li> <li>b. Upload process can be used to add new projects.</li> <li>c. The data captured can be defined by a system administrator and could include: project schedule, source, funding, status and other selected project details and status information.</li> </ul>	Integrations	
Should provide role-based security (screens/ functions/ workflow determined by role)	Security	
Should provide department or portfolio-based security (users can see only their area's data and documents)	Security	
Should provide the ability for team members to include individuals from different departments. For example, it should be possible to easily add team members from different departments, groups, or project teams to the same project.	Security	
Should provide the ability to have team members who are external to the City. These team members need to have access to same functionality as other team members, except are not required to record time	Security	
Should provide the ability to mask or hide resource rates, so that only users in certain roles can view resource rates.	Security	