

I. Email:

ID	EMAIL
1a	Basic e-mail functionality, including but not limited to send, receive, format, and attachment;
1b	Ability to integrate with the City's mail client configuration
1c	Ability to integrate with any mobile device that supports standard mail protocol;
1d	Ability to create user defined e-mail groups or personal folders based on search criteria
1e	Ability to journal to any e-mail archiving solution
1f	Ability to define roles for e-mail handling
1g	Ability to add both personal signatures and notes
1h	Retention Policy and Litigation Hold
1i	Ability to retain e-mail (List per-user limit);
1j	Ability to copy, move, save, and store information to desktop or local storage
1k	Ability to print stored information to a City facility
1l	Ability to scan or fax from multifunction devices to e-mail;
1m	Allow addressing of emails to be sent via fax
1n	Allow for receipt of inbound faxes within resource mailbox
1o	Ability to send, assign, and delegate tasks
1p	Ability to use e-mail system remotely
1q	Ability to delegate e-mail functionality to another staff member (i.e., proxy assignments, mail folders, etc)
1r	Ability to define access levels (e.g., Read/Write; Subscribe to Alarms and Appointments, Modify Options, Rules, and Folders);
1s	Ability to integrate "send to" function with external apps
1t	Non-mailbox storage of email, contacts, calendar items, tasks and documents within the email infrastructure
1u	Allow send and receive of email messages with employees, Agents and Agents staff and parties outside the city
1v	Allow creation and maintenance of task lists within the email system
1w	Allow for users to recover deleted mail messages for a set period of time
1x	Allow for delegation of all or portions of the user's mailbox, calendar, and/or contacts
1y	Allow for creation of automated rules that can manipulate email in the inbox
1z	Allow for Out of office messages that indicates the user is out of the office
1aa	Allow for setting of message priority (high, normal, low)
1bb	Allow for setting of message sensitivity (normal, personal, private, confidential)
1cc	Provide a web based email client. Including but not limited to: Calendar, Contact, and Document Management.
1dd	Allow for alternate SMTP addresses to be assigned to a mailbox

1ee	Allow for binary overwrite of deleted pages in the email database
1ff	Allow for prohibiting sending of new email if user is over mailbox quota setting
1gg	Allow for mailbox size quota restrictions
1hh	Allow for customized quota warning messages
1ii	Allow for different maximum mailbox sizing based on user classification
1jj	Allow for individual mailbox sizing to differ from user classification
1kk	Allow for individual mailbox size of 25Gb
1ll	Use of security group to control access to Resource Mailboxes
1mm	Search or Sorting feature available in the Mail Client
1nn	The solution meet federal, state, industry and web hosting best practices for security including access management and configuration management of the web hosting/service aspects of the email infrastructure
1oo	Document and execute an effective security patch management plan
1pp	Security controls (malware scanning, secure messaging, content, custom policies) applied against all inbound internet email
1qq	Security controls (malware scanning, secure messaging, content, custom policies) applied against all outbound internet email
1rr	Block email that is spoofed and claims to be from a specific domain
1ss	Provide for encryption of emails that contain sensitive data
1tt	Secure exchange of mail between Customer and defined list of business partners via VPN
1uu	Provide secure connection between the email client and the email server for required user groups
1vv	Develop and execute an access management plan for the email infrastructure for vendor provided resources and Customer personnel
1ww	Allow for single sign on capabilities
1xx	Allow for accepting of emails generated by Customer Mass Mailer
1yy	Allow for a programmatic method of sending email messages to large groups of users. This could range from a workgroup, to a department, to an office, to the entire company.
1zz	Allow for Public Distribution lists to be added/updated /deleted by Customer DL
1aaa	Allow for Customer developer email TBA to work with the email system
1bbb	Allow for the programmatic generation of email messages via Windows, and other application interfaces
1ccc	Allow for integration with internal IM and web conferencing solutions
1ddd	Allow for the email system to accept SMTP based messages from 3rd party applications
1eee	Allow for IMAP access by 3rd party applications that require mailbox on the email system
1fff	Allow for presence integration from IM solution with email system

1ggg	Prevent public distribution lists from being used externally for sending mail into Customer
1hhh	Copy mailbox data prior to deletion from the mail system and retain for agreed upon number of days
1iii	Control placement of users based on City defined parameters
1jjj	Maintain existing Customer email address naming standard
1kkk	Allow for new email address naming
1lll	Allow for making a copy of an individual email message or mailbox for internal Customer use.
1mmm	Allow for approved personnel to conduct searches within the email system
1nnn	Allow for removing access to a mailbox outside of normal update/synchronization process
1ooo	Allow for the physical destruction of storage media that contains email data when replaced due to infrastructure or upgrade.
1ppp	Allow for binary overwrite of media used to backup email data before being reused.
1qqq	Allow for accepting SMTP mail from 3rd party applications hosted internally at Customer
1rrr	Allow for integration with 3rd party application hosted internally aspects of the email system
1sss	Restrict email access to only approved devices on the City network

II. Calendar:

ID	CALENDAR
2a	Allow send and receive of calendar entries for internal and external users and events
2b	Allow creation of events and reminders within the email system
2c	Search or Sorting feature available in the Calendar Client
2d	Basic calendaring functionality, including but not limited to appointment, event, meetings, and sharing
2e	Ability to synchronize calendar to industry standard devices
2f	Ability to view multiple calendars at the same time (both personal and global);
2g	Ability to schedule resources, including but not limited to facilities, conference rooms, and equipment;
2h	Ability to manage resources by proxy (e.g., delegate calendar management, set "view-only" or "edit" rights, etc.) to another staff member
2i	Ability to print calendars locally in standard formats (such as daily, weekly, monthly, Franklin format, etc.);
2j	Ability to view and schedule from "free-busy" information; and
2k	Ability to view or hide appointment details.
2l	Integration with Document Management System used in Law Department
2m	Public Calendar displaying all event details for City and Public use

III. Contact Management:

ID	CONTACTS
3a	Allow creation and maintenance of personal contacts within the email system
3b	Prevent public distribution lists from being used externally for sending mail into Customer
3c	Allow public distribution lists to be used for securing access to mail system resources
3d	Allow creation and maintenance of public distribution lists/groups stored within the email system
3e	Allow creation and maintenance of private distribution lists/groups stored within the email client
3f	Search or Sorting feature available in the Contact Client
3g	Basic contact management functionality, including but not limited to last name, first name, middle initial, department, title, phone number, fax number, mailing address, e-mail address, business address, contact log, notes, etc.;
3h	Ability to synchronize contact information with desktop applications
3i	Ability to synchronize contact information with industry standard mobile devices;
3j	Ability to share contact lists
3k	Ability to centrally manage and distribute Global Address Lists (GALs)

IV. e-Discovery:

ID	e-DISCOVERY
4a	Ability to search based on the following criteria: Content; Sender and/or recipient; Date Range; Search Terms; and Metadata
4b	Ability to store search results with any metadata
4c	Ability to add and delete from search results to create an e-Discovery set;
4d	Ability to provide a detailed report addressing standard practices and policies related to e-Discovery.
4e	Allow for journaling (server-side capture of all sent/received email) of individual mailboxes within specified departments or ad-hoc capture groups to satisfy internal compliance needs
4f	Allow for journaling (server-side capture of all sent/received email) of individual mailboxes within specified departments to satisfy regulatory needs
4g	Allow for journaling (server-side capture of all sent/received email) of designated resource mailboxes
4h	Ability to enable and disable journaling for new departments, ad hoc users/groups, and to process updates to existing departments and ad hoc listings

4i	Ability to retain, store and search all internal and external email for a period of no less than 10 years
4j	Ability to disallow copying of emails into unapproved location and/or storage media
4k	Ability to restrict individuals from creating .pst files.
4l	Ability to allow for plain text version of encrypted emails to be created for capture purposes.
4m	Ability to store native emails/documents with retention properties in a shared or personal repository.
4n	Ability to store encrypted emails/documents.
4o	Ability to retrieve stored emails/documents and open them back into their native application.
4p	Ability to maintain metadata integrity when storing an email/document in the repository (such as create date, owner, sent date, to, from, etc?)
4q	Ability to set retention properties (category, location and trigger date) pulled from RMR.
4r	Ability to single-select retention properties on an individual email/document.
4s	Ability to provide the county with this stored data should the county decide to change providers.
4t	Ability to single-select retention properties at a parent level, allowing for metadata inheritance of these retention properties when storing within the parent level
4u	Ability to view retention properties at all levels (single and parent).
4v	Ability to sort folder contents on metadata (e.g., To, From, Subject, Sent/Received).
4w	Ability to view metadata when navigating to stored emails/documents (this goes beyond IRP e.g., To, From, Subject, Sent/Received).metadata,
4x	Ability to allow both declared and non-declared (draft) emails/documents within the repository.
4y	Ability to update retention properties for one email/document, however once an email/document is declared, the retention properties cannot be set to "draft."
4z	Ability to have a configurable "grace period" on declared documents. (To change a declared email/document back to a draft within a configurable period of time.)
4aa	Ability to bulk-update retention properties, with authorization.
4bb	Ability to bulk add/store (and declare) emails/documents within the repository, to a configurable limit.
4cc	Ability to delete a single declared email/document, with authorization.
4dd	Ability to delete declared emails/documents within the repository that have met retention criteria, considering trigger events, hold orders and IRP Annual Review timing.
4ee	Ability to retrieve emails/documents from a "trash folder" for a configurable number of days (soft delete)
4ff	Ability to set delegate/security access at an individual email/document level and at a parent level.
4gg	Ability to change email/document security (to allow others access/view).

4hh	Ability to provide a URL link to documents/emails in repository.
4ii	Ability to delete email/document from origination/source when it is added into the repository (move not copy)
4jj	Ability to delete non-declared (draft) emails/documents.
4kk	Ability to lockdown editing of declared emails/documents within the repository.
4ll	Ability to transfer declared documents to another associate or collaborative group (ownership & location)
4mm	Ability to maintain metadata integrity when transferring or moving declared emails/documents.
4nn	Ability to access active and terminated associate information within the repository.
4oo	Ability to search on email/document metadata and content, including content within attachments.
4pp	Ability for e-discovery searches including access and copy-out capabilities
4qq	Ability to expire non-declared emails/documents after a configurable period of time.
4rr	Allow for recovery of deleted mailboxes from the copy taken prior to deletion to a "recovery" mailbox for viewing by approved City personnel
4ss	Recall and/or retrieve within City e-mail system and/or current/future City archiving system.
4tt	Allow for email retention management within the email system

V. Data File Collaboration:

ID	Documents - General
5a	Applications allow real-time sharing, editing, viewing, and/or commenting of data and files stored within the solution for multiple users
5b	Litigation Hold and Retention Policy on all documents
5c	Permissions for each document that allow for edit and view access
5d	Users can share documents with others outside the organization
5e	Administrators can restrict users' right to share documents outside the organization
5f	All documents can be both viewed and edited in a web browser
5g	Ability to have multiple staff members work on common files at the same time from different or separate City work locations
5h	Ability to collaborate with staff members that are telecommuting or otherwise away from a City facility
5i	Ability for screen sharing of user applications and streaming video
5j	Provide All screen sharing capabilities and webinar features
5k	Auto-save of draft documents
5m	Availability of a Wiki-type solution for collaboration that allows changes to be tracked by the user;
5n	Ability to setup, create, and maintain process flow;

5o	Different access levels can be shared with individuals, groups, the entire organization or the public
5p	Ability to maintain version control (i.e., who, what, when)
5q	Support for the following browsers: IE, FF, Safari and Chrome
5r	Import function supports .doc, .docx, .html, plain text (.txt), .rtf
5s	Save function supports HTML, RTF, Word, PDF, Text
5t	Comments feature that allows users to comment on the document instead of editing
5u	Support for footnotes, headers, and footers
5v	Document translation
5w	Documents can be published as static web pages
5x	Import function supports .xls, .xlsx, .ods, .csv, .tsv, .txt, .tsb
5y	Save function supports CSV, HTML, ODS, PDF, XLS, TXT
5z	Spreadsheets can be extended with industry-standard JavaScript
5aa	Graphs and charts can be published and embedded into websites
5bb	Spreadsheets can be turned into web-based forms
5cc	Forms automatically create summaries of responses
5dd	Import function supports .ppt, .pps
5ee	Save function supports PPT, PDF
5ff	Web-based presentations can be shared to provide real-time editing, viewing, and/or commenting.
5gg	Ability to embed rich media including photos, maps, video
5hh	Users can create, web sites directly without assistance from IT
5ii	Templates for both entire Sites and Pages within Sites
5jj	Web sites can embed any document type or video
5kk	Users can share edit rights for a site with individuals, groups, or the entire organization
5ll	User can restrict who can view a site to individuals, groups, the entire organization
5mm	Administrators can restrict users' ability to make sites public
5nn	Provide a minimum of 100GB storage for video
5oo	Users can upload videos directly from the web-browser
5pp	Video owners can add title and description for videos
5qq	Videos can be shared with individuals, groups, or the whole company
5rr	Users can tag video content
5ss	Users can search across content, including title, description, and user tags
5tt	Users can rate videos they watch
5uu	Videos can be embedded into websites
5vv	User can adjust the playback speed of videos
5ww	Closed captioning available for videos

VI. Solution Administration:

ID	SOLUTION ADMINISTRATION
6a	Provide necessary support structure to meet service level and performance standards
6b	Ability, from the administrative console, to;
6c	o Fully manage all City accounts within the City network, including but not limited to addition, deletion, manipulation and suspension;
6d	o Control SPAM or provides anti-spam
6e	o Control virus or provide anti-virus (including spyware);
6f	o Fully manage SaaS identity and user accounts;
6g	o Apply content filter;
6h	o Ability to apply policies in managing solutions;
6i	o Review restricted e-mail;
6j	o View all calendars and appointments;
6k	o Print historical, statistical and usage reports locally;
6l	o Manage attachment size;
6m	o Setup mail routing;
6n	o Manage multiple separate Address Lists/Books;
6o	o Use "Whitelist", "Blacklist" and aliases;
6p	Ability to use all domain names and aliases within City as e-mail extensions
6q	Ability to synchronize e-mail identities with identities that are managed in our internal authentication directory;
6r	Ability to control industry standard mobile/smart devices such as, including the ability to synchronize calendar, contacts and e-mail;
6s	Ability to integrate with internal applications using e-mail, specifically using SMTP, IMAP, SOAP, POP3, etc
6t	Ability to manage Domain Names;
6u	Ability to migrate Historical or user Archives from current proprietary format to proposed solution after implementation;
6v	Extent to which administration can be implemented in a distributed manner to different departments
6w	Provide reports on common email system metrics (# of mailboxes, # of DLs, amount of email messages sent/received, average message size, etc)
6x	Provide trend analysis on common email system metrics
6y	Need to be able to generate ad-hoc email statistical reports based on individual or departmental attributes
6z	Provide notification of planned outages for maintenance and upgrades within agreed upon timeframe prior to planned outage
6aa	Provide an email test environment to be used with our development testing
6bb	Allow for administration of test accounts in the testing environments

6cc	Allow for the sending and receiving of messages via Android and IOS devices
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VII. Mobile:

ID	MOBILE
7a	Mobile Device Management System: At the minimum the ability to perform the following tasks
7b	Centralized Control Panel
7c	Asset Tracking of smartphone, basic phone, and modem devices
7d	Remote Wipe
7e	On device Application Control. Ability to push down specific applications and profiles to devices.
7f	Secure the device with Pin or Password
7g	Support all Industry standard devices
7h	Support Approved Personal devices

VIII. Disaster Recovery:

ID	DISASTER RECOVERY
8a	Provide proactive monitoring of the email system 24 X 7 X 365
8b	Provide support for email system 24 X 7 X 365
8c	Provide problem identification and tracking
8d	Service restoration within 1 hour of service interruption for both e-mail and data files
8e	Response Time: 30minutes for mission critical issue, 4 hours for all other issues
8f	Escalation Time: >4 hours No resolution for mission critical issue, =24 hours for all other issues
8g	Provide status and progress for any system outages and incidents
8h	Provide a written detailed business continuity plan
8g	Provide trend analysis on email system problems and problem resolutions
8j	At minimum, annual testing of the DR plan
8k	Predefined identification of roles and responsibilities;
8l	Identify qualifications for initiating and ceasing "Disaster" condition
8m	Email service is available 24 hours a day
8n	Immediate response from the Vendor for system restoration expected.
8o	Final report of any system outages/incidents (including cause, resolution, duration, number of impacted users and actions that will be taken to prevent future occurrences)
8p	Share Support area for City of Pittsburgh Personnel (admin users)

8q	Develop and execute effective backup schedule
8r	Retain email backup data for agreed upon number of days
8s	Retain email backup data beyond agreed upon timeframe at the request of Customer
8t	Develop and execute effective recovery measures in the event of data corruption or system infrastructure
8u	Develop and execute effective business continuity plan for providing continued email service
8v	Backup media used for email should only contain email data

IX. Legal:

ID	LEGAL
9a	Customer must be notified if the vendor is ever asked to search or produce Customer email in response to litigation or other investigation.
9b	Customer email data must be separated from other customer data
9c	Customer email backup data must be separated from other customer backup data
9d	Allow for email data for legal users to be stored on physically separate storage media from the rest of the enterprise
9e	Allow for email data for legal users to be backed up on physically separate storage media from the rest of the enterprise
9f	Customer data center assets must reside in continental US
9g	Customer email data (live, test and backup) must reside in continental US
9h	No City asset or data are to be managed by off-shore personnel.