

REQUEST FOR PROPOSALS (RFP) NO. 10-0072
TO
PROVIDE, INSTALL, INTEGRATE, TRAIN, AND MAINTAIN
A VOICEMAIL REPLACEMENT
FOR
UNIVERSITY OF HAWAII AT MANOA
HONOLULU, HAWAII

OCTOBER, 2009

BOARD OF REGENTS
UNIVERSITY OF HAWAII
HONOLULU, HAWAII

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for University of Hawaii at Manoa, Honolulu, Hawaii

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**IT IS THE RESPONSIBILITY OF ALL OFFERORS TO CHECK THE TABLE OF CONTENTS
TO CONFIRM THAT ALL PAGES LISTED THEREIN ARE CONTAINED IN THEIR RFP
PACKAGE.**

NOTICE TO OFFERORS

PROPOSAL FORMS for Request for Proposals (RFP) No. 10-0072, Voicemail Replacement, will be available from and received in the OFFICE OF PROCUREMENT AND REAL PROPERTY MANAGEMENT, UNIVERSITY OF HAWAII, 1400 LOWER CAMPUS ROAD, ROOM 15, HONOLULU, HAWAII 96822, no later than **2:30 p.m., December 9, 2009**.

Proposals received after the time and date fixed for submission will not be considered.

Vendors located outside the Island of Oahu, Hawaii, USA, may request an official copy of the RFP to be sent via U.S. Postal Service by providing the vendor's name, address, contact person and telephone number. If express shipment is desired, requests must be submitted in writing with an account number, BILLABLE TO THE RECEIVER, and an authorized signature. Requests may be transmitted via facsimile, (808) 956-2093. Direct all questions to Kurt Minato, (808) 956-7159.

M.R.C. Greenwood
President, University of Hawaii

Posting Date: October 29, 2009

Vendors downloading the RFP shall be responsible for notifying the Procurement Specialist Kurt Minato (e-mail: minato@hawaii.edu;; fax: [808] 956-2093), so that the name, address, phone number, fax number, and e-mail address of the vendor can be listed on the University's register for the purpose of notification of any amendments to the IFB which are issued.

NOTICE TO OFFERORS

BUSINESS CLASSIFICATION CERTIFICATION STATEMENT

Vendors: Please complete the following information below. If you answer "No" to question No. 1, complete the certification portion and submit together with your bid document or quote.

(Terms used are taken from the Small Business Administration Rules and Regulations and the Federal Acquisition Regulation [FAR].) (Reference Section A on the reverse side of this form for Category Descriptions.)

This is to certify that the company identified below:

1. _____ IS a **small business** as defined in the Small Business Administration regulations.
(see reverse for size standards).

_____ IS NOT a small business as defined in the regulations.
(If you checked here, STOP, GO TO CERTIFICATION BELOW.)
2. _____ IS a **small disadvantaged business concern** and is identified, on the date of its representation, as a certified small disadvantaged business in the database maintained by the Small Business Administration (PRO-NET).
3. _____ IS a **women-owned small business concern** of which at least 51% is owned, controlled, and managed by one or more women; or in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women.
4. _____ IS a **HUBZone small business concern** that appears on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration.
5. _____ IS a **veteran-owned small business concern** of which not less than 51 percent is owned, controlled and managed by one or more veterans; or in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more veterans.
6. _____ IS a **service-disabled veteran-owned small business concern** of which not less than 51 percent is owned, controlled and managed by one or more service-disabled veterans, or in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans as defined in 38 U.S.C. 101 (16).

CERTIFICATION:

I hereby certify the information supplied herein to be true and correct.

Company Name: _____

Signature of Company Officer

Type of Goods/Services: _____

*NAICS Code: _____

Company Address: _____

Print Name: _____

Title: _____

Date: _____

Any misrepresentation shall be subject to the provisions stated in item B on the reverse side.

* North American Industry Classification System (NAICS)

- A. "SMALL BUSINESS" SIZE STANDARDS FOR FEDERAL SUB-CONTRACTORS. Small business size is determined by the primary NAICS Code. See Title 13 CFR, Part 121 to determine your NAICS Code and the threshold for determining small business (revised as of January 1, 2004).

A "small business" is a concern including its affiliates, which is independently owned and operated. It is not dominant in the field of operations in which it is selling goods and services to a federal contractor. It meets the following size criteria for its particular industry:

1. CONSTRUCTION TRADES - "Small" if average annual receipts for preceding 3 years do not exceed \$12 million.
2. CONSTRUCTION, GENERAL CONTRACTORS - "Small" if average annual receipts for preceding 3 years do not exceed \$28.5 million.
3. MANUFACTURING - "Small" if 500 employees or less, except for some specific products which will increase the complement of employees to 750 and 1,000, respectively.
4. TRANSPORTATION - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:

\$21.5 million – general freight trucking, local.
\$3 million – travel agencies.
5. WHOLESALE TRADE, DURABLE AND NON-DURABLE GOODS - "Small" if 100 employees or less.
6. RETAIL TRADE - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific products:

\$6 million - lumber and building materials, paints, hardware.
7. SERVICES - "Small" if average annual receipts for preceding 3 years do not exceed the amount shown for specific services:
 - a. \$21 million – computer systems design services, custom computer programming services.
 - b. \$10.5 million - refuse collection, protective guard services.
 - c. \$14 million - janitorial services.
 - d. \$21.5 million - passenger car rental
 - e. \$21 million – office Machinery and equipment rental & leasing
 - f. \$6 million - general automobile repair, refrigeration & air conditioning.
8. ALL OTHER TYPES OF BUSINESS - "Small" if 500 employees or less.

Where firm sizes are determined by annual receipts, and the concern is less than 3 complete fiscal years old, its total receipts means for the period it has been in business, divided by the number of weeks, including fractions of a week, and multiplied by 52.

- B. Notice. Under 15 U.S.C. 645(d), any person who misrepresents a firm's status as a small, small disadvantaged or women-owned small business concern in order to obtain a contract to be awarded under the preference programs established pursuant to sections 8(a), 8(d), 9, or 15 of the Small Business Act or any other provision of Federal law that specifically references section 8(d) for a definition of program eligibility, shall:

1. Be punished by imposition of fine, imprisonment, or both;
2. Be subject to administrative remedies including suspension and debarment; and
3. Be ineligible for participation in a program conducted under the authority of the Act.

SECTION 1 ADMINISTRATIVE OVERVIEW

1.1 INTRODUCTION

This is a Request for Proposals (RFP) issued by the University of Hawaii to solicit proposals from Offerors who wish to be considered to provide, install, integrate, train, and maintain a voicemail replacement.

1.2 AUTHORITY

This Request for Proposals (RFP) is issued under the provisions of the Hawaii Revised Statutes, Chapters 103 and 103D. All prospective Contractors are charged with presumptive knowledge of all requirements of the cited authorities. Submission of a valid executed proposal by any prospective Contractor shall constitute admission of such knowledge on the part of such prospective Contractor.

1.3 RFP ORGANIZATION

This RFP is organized into the following sections:

Section 1, Administrative Overview -- Provides Offerors with general information on the objectives of this RFP, procurement schedule, and procurement overview.

Section 2, Scope of Work -- Provides Offerors with a general description of the tasks to be performed, delineates University and Contractor's responsibilities, and defines deliverables.

Section 3, Proposal Requirements -- Describes the required format and content for the Offeror's proposal.

Section 4, Criteria to Evaluate Proposals -- Describes how proposals will be evaluated by the University of Hawaii.

Section 5, Special Provisions -- Provides Offerors the terms and conditions under which the work will be performed.

1.4 SCHEDULE OF KEY DATES

The schedule of key dates set forth herein represents the University's best estimate of the schedule that will be followed. Any of the dates listed below may be changed at any time at the sole discretion of the Director, Office of Procurement and Real Property Management:

RFP Advertised and Issued	<u>October 29, 2009</u>
Closing Date for Submission of Questions	<u>November 12, 2009</u>
University Response to Offeror's Questions	<u>November 23, 2009</u>
Closing Date for Receipt of Proposals	<u>December 9, 2009</u>
Proposal Review Period	<u>Dec. 10, 2009 – Jan. 8, 2010</u>
Contractor Selection and Award	<u>January 15, 2010</u>
Contract Start Date	<u>February 1, 2010</u>

1.5 SUBMISSION OF QUESTIONS

Offerors may submit questions in writing to the issuing officer. The deadline for submission of written questions is **4:30 p.m., H.S.T. on November 12, 2009.**

Offerors may call the Technical Representative, Harry Morita at (808) 956-6080, for questions regarding the content of the work specifications.

1.6 SUBMISSION OF PROPOSALS

Offerors shall submit an original plus SIX (6) copies of the proposal. Proposals shall be received by the Office of Procurement and Real Property Management, University of Hawaii, no later than **2:30 p.m., H.S.T. on December 9, 2009.**

Proposals shall be mailed or delivered to:

Office of Procurement and Real Property Management
University of Hawaii
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822

Any proposal received after this date and time shall be rejected.

The outside cover of the package containing the proposal shall be marked:

Office of Procurement and Real Property Management
University of Hawaii
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822
RFP No. 10-0072, Provide, Install, Integrate, Train, and Maintain a Voicemail
Replacement for University of Hawaii at Manoa
(Name of Offeror)

1.7 COSTS FOR PROPOSAL PREPARATION

Any costs incurred by Offerors in preparing or submitting a proposal shall be the Offeror's sole responsibility.

1.8 DISQUALIFICATION OF PROPOSALS

The University reserves the right to consider as acceptable only those proposals submitted in accordance with all requirements set forth in this RFP and which demonstrate an understanding of the scope of the work. Any proposal offering any other set of terms and conditions contradictory to those included in this RFP may be disqualified without further notice.

An Offeror shall be disqualified and the proposal automatically rejected for any one or more of the following reasons:

The proposal shows any noncompliance with applicable law.

The proposal is conditional, incomplete, or irregular in such a way as to make the proposal indefinite or ambiguous as to its meaning.

The proposal has any provision reserving the right to accept or reject award, or to enter into a contract pursuant to an award, or provisions contrary to those required in the solicitation.

The Offeror is debarred or suspended.

1.9 PROCUREMENT OFFICER

This RFP is issued by the Office of Procurement and Real Property Management, University of Hawaii. The Procurement Officer responsible for overseeing the contract is Duff Zwald, Director of the Office of Procurement and Real Property Management.

1.10 TECHNICAL REPRESENTATIVE OF THE PROCUREMENT OFFICER (TRPO)

The individual listed below is the Technical Representative of the Procurement Officer (TRPO):

Harry Morita
Telephone: (808) 956-6080
Facsimile: (808) 956-5150

Information Technology Services
2545 McCarthy Mall, Bilger Addition 503
Honolulu, Hawai'i 96822

1.11 ISSUING OFFICER

The individual listed below is the issuing officer and the official contact for all communication regarding this RFP:

Kurt Minato, Procurement Specialist
Office of Procurement and Real Property Management
University of Hawaii
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822
Telephone: (808) 956-7159
Facsimile: (808) 956-2093

1.12 CHANGES TO CONTRACTOR'S FEE

It is recognized that audit disallowances and other changes may require adjustments in the compensation due to the Contractor. In the event that future actions would either disallow or minimize the payments already made to the Contractor, the Contractor shall assist the University in defending the correctness of the claim for reimbursement. If the disallowance or adjustment is upheld, then the Contractor will participate in the payback to the extent the amount of the disallowance or adjustment contributed to the total fee received by the Contractor. Payment to the University shall be made within THIRTY (30) calendar days from which official notice is received by the Contractor from the University.

1.13 RFP AMENDMENTS

The University reserves the right to amend the RFP any time prior to the closing date for best and final offers.

1.14 AWARD ON INITIAL PROPOSALS

The University may award a contract on the basis of initial offers received, without discussions. Therefore, each initial offer should contain the Offeror's best terms.

1.15 AVAILABILITY OF FUNDS

Offerors are advised that the award of this contract is contingent upon availability of funds. If funds are not available, the University reserves the right not to make award of this contract.

1.16 NOTICE TO PROCEED

The University shall not be responsible for work done, even in good faith, prior to the University's Notice to Proceed unless specific provisions are made in the contract.

1.17 RFP SUBMITTALS BECOME PROPERTY OF THE UNIVERSITY

All proposals and other material submitted shall become the property of the University and may be returned only at the University's option.

SECTION 2 SCOPE OF WORK

2.1 OVERVIEW OF THE SCOPE OF WORK

The University of Hawaii at Manoa currently maintains a Nortel Communication Server 1000M and Meridian Mail system to provide telephony services to approximately 10,000 individual lines on the University of Hawaii at Manoa campus. As Meridian Mail will no longer be supported by the manufacturer, the University is seeking a replacement system to provide ongoing voicemail service to its users.

The system shall initially be provisioned for 6,000 voicemail accounts and be scalable for future expansion. Offerors shall propose the installation, integration and training of the voicemail replacement system, as well as an annual maintenance service agreement for items including, but not limited to hardware failures, software upgrades and feature enhancements. The installation shall include migration of the existing 6,000 voicemail accounts, but not the contents of each mailbox. After the initial installation has been completed, the University will primarily manage the system in-house and escalate problems to the vendor.

The University is also moving to a softswitch VOIP platform for telephony service in the future. At this time the vendor of the softswitch has not been chosen. The proposed voicemail replacement solution shall interoperate with both the current Nortel Communication Server 1000MG and current, leading softswitch vendor platforms.

With the installation of a new voicemail system replacement, options such as Unified Communications, Fax gateways and other feature enhancements may be desirable to provide value added service to the University community.

2.2 STATEMENT OF WORK

Offerors shall propose a turnkey solution for the installation, integration, training and support of a voicemail replacement system. The voicemail replacement system must provide the current voicemail services and emulate the Meridian Mail's menu system to ease transition for the users with minimal training. Proposal shall include the migration of voicemail user accounts, time of day schedules, prompt maintenance, auto attendant greetings, menus and other features to make the new system comparable to the existing Meridian Mail system. The contents of each mailbox will not be migrated to the new system. Specific mandatory and desirable functions and features are listed in Appendix C.

Provisioning of voicemail accounts shall be integrated with the provisioning of lines in the Nortel PBX if possible. No points will be deducted if a separate provisioning system is required, although this must be stated in the response.

Interfaces to the Nortel CS1000M shall be either PRI based or SIP based, with the understanding that the solution must work with the current revision of the Nortel CS1000M 4.5 software and hardware cards that are currently installed. The University may elect to upgrade the Nortel CS1000M to version 5.5 prior to the installation; however, no upgrades to the Nortel CS1000M will be performed as part of this proposal. If additional interface cards are required by the CS1000M, these should be identified and included as part of the cost.

The physical location of the voicemail replacement system shall either be within proximity to the existing Nortel CS1000M, or in an adjacent building where the campus network equipment is located. Copper pairs as well as IP connectivity are available for use to tie the two systems together in both locations.

Offerors shall propose annually renewable maintenance and support services in order to ensure the system remains fully operational. Support must include access to a knowledgebase, and a 24x7x365 toll free technical support number. Replacement parts shall be shipped prior to the receipt of the defective part, and shall be delivered next business day. Maintenance shall include hardware, software, and technical support for the initial year, as well as options for FOUR (4) additional years for a total of FIVE (5) years. Offeror shall include cost of spare parts kit, if available.

Training shall include, but not limited to, on-site system administration and maintenance training, including backup and restoring the application and configuration.

Documentation of as-built network interconnection diagrams and final configuration files shall be provided to the University in addition to TWO (2) sets of hard-copy and FIVE (5) sets of soft-copy documentation for all hardware and software installed for the voicemail system.

Offerors shall include options to enable Unified Communications, Fax gateways for inbound and possibly outbound calls, and other feature enhancements that will provide value added services to the users. Unified Communication enhancements must be cross platform (Windows & Mac OS X) and standards based. The University of Hawaii runs LDAP and Solaris systems as its directory and email platform, and does not utilize Microsoft Active Directory or Exchange.

Offerors shall include options to provide for hardware redundancy of the voicemail system, both in storage as well as system redundancy.

2.3 MINIMUM QUALIFICATIONS

Offerors shall include in its proposal statements describing their qualifications and experience with voicemail systems, including, but not limited to their implementation and use in similar sized public sector or education customers.

The University requires that Offerors possess current working knowledge of voicemail systems and the integration into a Nortel CS1000M system, as well their ability to provide ongoing support and maintenance of such an installation and future integrations into a softswitch environment.

2.4 TERM OF CONTRACT

The initial term of the maintenance contract shall be for ONE (1) year, commencing from the date of completion and acceptance of the voicemail system by the University, with the option to renew the maintenance service for FOUR (4) additional years. Either party may terminate this agreement at any time upon NINETY (90) days' written notice.

SECTION 3 PROPOSAL REQUIREMENTS

3.1 INTRODUCTION

This section indicates the proposal requirements for this RFP which shall be submitted by the deadline set for submission of proposals. Fulfillment of all proposal requirements listed is mandatory for consideration of proposals.

The Proposal shall include the following subsections:

Proposal Letter

Recent Experience

Project Narrative

References

3.2 PROPOSAL LETTER (Appendix A)

The Proposal Letter shown in Appendix A shall be signed by an individual authorized to legally bind the Offeror, dated, and be affixed with the corporate seal (if corporate seal is available). If said individual is not the corporate president, evidence shall be submitted showing the individual's authority to bind the corporation. The fully executed proposal letter shall be submitted along with the proposal.

3.3 OFFEROR'S EXPERIENCE (Appendix B)

Offeror shall complete and submit APPENDIX B, Recent (Within Last 5 Years) Experience

3.4 PROJECT NARRATIVE

- A. A description of the company, including number of employees, number of years in business in Hawaii, a list of key company principals, and types of services provided.
- B. Describe in detail how Offeror's company will be able to provide a turnkey solution for the University as described in its proposal.

- C. Detailed work plan showing all critical tasks and milestones expected during the implementation of the turnkey voicemail replacement for the University. The work plan will identify any critical participation by the University required to ensure successful implementation of the system.
- D. Provide price for turnkey voicemail replacement system or the University of Hawai'i at Manoa campus, including installation, integration, training, and maintenance support for FIVE (5) years of operation. Offerors shall provide SEPARATE pricing for optional hardware/software redundancy, and for Unified Communications and Fax features.

3.5 VOICEMAIL FUNCTIONAL AND FEATURE DESCRIPTION (Appendix C)

Offeror shall complete and submit APPENDIX C, Voicemail Functional and Feature Description. The "Feature Availability" column shall be completed on the form. Use a separate sheet for comments.

3.6 REFERENCES/RECOMMENDATIONS (Appendix D)

Offerors shall provide a minimum of at least THREE (3) references who can attest to the reliability of the Offeror's service and personnel. Furnish the names of companies, addresses, phone numbers, and contact persons. The University reserves the right to contact the references for additional information.

3.7 OFFEROR'S PROPOSAL SUBMITTALS CHECK LIST

The following checklist is provided to assist the Offeror in submitting the appropriate documents with their proposals:

- 1) _____ Business Classification Certification Statement
- 2) _____ Appendix A, Proposal Letter (if applicable, shall include a corporate seal and an Evidence of Authority if the individual signing the proposal on behalf of the company is not the corporate president)
- 3) _____ Appendix B, Offeror's Experience
- 4) _____ Appendix C, Voicemail Functional and Feature Description
- 5) _____ Appendix D, References
- 5) _____ Project Narrative

SECTION 4 CRITERIA TO EVALUATE PROPOSALS

The evaluation of proposals received in response to the RFP will be conducted comprehensively, fairly, and impartially. Contracts will be awarded to responsive, responsible Offerors whose proposals are determined in writing to be the most advantageous to the University taking into consideration the evaluation factors set forth in this RFP.

A committee will evaluate and score each proposal submitted based on the following criteria:

4.1	<u>Offeror Qualifications and Experience</u>	25 pts. Maximum
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4.2	<u>Proposed Solution</u>	35 pts. Maximum
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The University will assess the completeness of the proposed solution, including the degree to which the proposed solution satisfies the University's requirements stated herein.

4.3	<u>Proposal Evaluation Price</u>	40 pts. Maximum
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Price for turnkey voicemail replacement system for the Manoa campus, including installation, training, maintenance, and support for initial FIVE (5) years of operation. Provide separate pricing for optional hardware/software redundancy, and for Unified Communications and Fax features.

TOTAL POSSIBLE POINTS	100 pts. Maximum
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SECTION 5 SPECIAL PROVISIONS

5.1 SCOPE

The Providing, Installation, Integration, Training, and Maintenance of a Voicemail Replacement for University of Hawaii at Manoa, shall be in accordance with the terms and conditions of RFP No. 10-0072 and the General Provisions dated August, 2007, included by reference. Copies of the General Provisions are available at the Office of Procurement and Real Property Management, University of Hawaii, 1400 Lower Campus Road, Room 15, Honolulu, Hawaii 96822 or the General Provisions may be viewed at: <http://www.fmo.hawaii.edu/procure/doc/gp0807.pdf>

5.2 REFERENCES

The University reserves the right to contact the references named in Appendix D, REFERENCES, and to reject a proposal submitted by any Offeror whose performance on other projects has been unsatisfactory.

5.3 OPENING OF PROPOSALS

Proposals will be opened at the date and time specified in Subsection 1.4, SCHEDULE OF KEY DATES, or as amended, at the proposal submittal office. The proposal opening will not be open to the public. Proposals may be available for public inspection upon notice of award and shall be available for public inspection after the contract is signed by all parties.

5.4 CONTRACT INVALIDATION

If any provision of this contract is found to be invalid, such invalidation will not be construed to invalidate the entire contract.

5.5 PAYMENT

The Contractor shall be remunerated upon submission of a properly executed original invoice and ONE (1) copy, indicating the contract number, to University of Hawai'i, Information Technology Services, 2524 Campus Road, Sinclair Room 10, Honolulu, Hawai'i 96822.

5.6 CAMPAIGN CONTRIBUTIONS BY STATE AND COUNTY CONTRACTORS

Contractors are hereby notified of the applicability of Section 11-205.5, HRS, which states that campaign contributions are prohibited from specified State or county government contractors during the term of the contract if the contractors are paid with funds appropriated by a legislative body. Further information is available from the Campaign Spending Commission at www.hawaii.gov/campaign or at (808) 586-0285.

**APPENDIX A
PROPOSAL LETTER
UNIVERSITY OF HAWAII**

We propose to furnish and deliver any and all of the deliverables and services named in the Request for Proposals (RFP) to Provide, Install, Integrate, Train, and Maintain a Voicemail Replacement System, RFP No. 10-0072, for which prices may be negotiated.

It is understood that this proposal constitutes an offer.

It is understood and agreed that we have read the University of Hawaii's specifications described in the RFP and that this proposal is made in accordance with the provisions of such specifications. By signing this proposal, we guarantee and certify that all items included in this proposal meet or exceed any and all such specifications.

We agree, if awarded the contract, to deliver goods or services which meet or exceed the specifications.

Respectfully submitted,

Legal Name of Offeror

Date

Authorized Signature (original) (Typed Name)

Title

Street Address

Telephone No.

City, State, Zip Code

Fax No.

Social Security OR Federal Tax Payer ID No.

Hawaii General Excise Tax License No.

Remittance Address (if different from street address)

City, State, Zip Code

Location of Offeror's Plant

Offeror is: ☐ Individual ☐ Partnership ☐ Corporation* ☐ Joint Venture

State of Incorporation: ☐ Hawaii ☐ Other:

Is Corporate Seal Available In Hawaii: ☐ Yes** ☐ No

* Attach to this page evidence of authority of the above officer to submit an offer on behalf of the corporation, giving also, the names and addresses of the other officers.

* If yes, affix corporate seal.

APPENDIX B
RECENT (WITHIN LAST FIVE [5] YEARS) EXPERIENCE

Provide a minimum of THREE (3) firms.

Name & Address _____ of Firm _____	Contact Person _____	Telephone Number _____	Date of Services _____	Description of Services _____
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NOTE: Offerors may use this form or a separate sheet in another format, provided all information requested is supplied.

Appendix C
Voicemail Functional and Feature Description
NOTE: Use a separate sheet for comments.

Item	Functional/Feature Description	Feature Availability (Yes/No)
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A. Traditional Voicemail Features - MANDATORY

- A.1 System's Auto Attendant (AA) functions can provide at least 10 options, corresponding with touchtone keys 0-9. Describe in detail how your system meets this requirement and include any AA limitations or restrictions in your system such as the number of AA's that can be configured, etc. Also, list hard limit on the number of AA's available on your system as specified in your Proposal.
- A.2 System's AA functions allow for nested menus.
- A.3 System's AA functions allow caller routing to extension
- A.4 System's AA functions allow caller routing to voice mailbox.
- A.5 Auto Attendant (AA) Provisioning: system administrator as well as subscriber can record prompts and messages if desired.
- A.6 AA Provisioning: configuration of prompts and messages can be limited to system administrator level only.
- A.7 AA Provisioning: includes time of day, day of week, day of year (Holidays, etc.) conditionals.
- A.8 AA can support use of "*" and "#" as well.
- A.9 For an individual voicemail message, must have a Message Waiting Indicator (MWI). Please describe MWI options and any factors that may cause delay
- A.10 MWI refresh: MWI indicators are refreshed between the PBX and the voicemail system. Describe how often your system refreshed MWI indicators and note if MWI refresh can be manually executed both system-wide and on a per-mailbox basis.
- A.11 Able to send broadcast voicemail messages. Describe system broadcast voicemail capabilities and broadcast voicemail security.
- A.12 Able to create subscriber generated voicemail mailing lists. Describe how your system does that.
- A.13 Able to emulate Meridian Mail key mapping. Describe to what extent your system's telephone user interface (TUI) is able to do that. Include or attach a user guide (pocket card).
- A.14 Ability for subscribers via TUI to speed up, slow down and pause playback rate of recorded messages. Describe how the system does that.
- A.15 Message retrieval ordering can be set system-wide to "first in, first out" (FIFO) and/or "last in, first out" (LIFO). Indicate FIFO, LIFO, or both.
- A.16 System includes calling party automatic number identification (ANI) information in voice message headers. Provide detailed description of what can and cannot be included in message headers.
- A.17 System allows users to listen to message header information without listening to the entire message. Describe how the system does that.

Item	Functional/Feature Description	Feature Availability (Yes/No)
A.18	Ability for subscribers via TUI to skip forward and backwards within a message while listening to recorded voice messages.	_____
A.19	Mailbox Types: announcement only (bulletin board type function) – for example, a student can dial in and listen to the class reading assignments for the week, but is not offered the option to leave a voice message.	_____
A.20	Mailbox Types: shared extension whereby multiple users share the same campus phone extension but each can have his/her own private voice mailbox not accessible by others – for example, a caller into a shared extension hears “press 1 to leave a message for Jim, press 2 to leave a message for Jane, etc.”	_____
A.21	Mailbox Types: shared – when a message is left, multiple users are notified; each user has his/her own pass code or password to access the shared voice mailbox.	_____
A.22	Other basic voicemail features include but are not limited to all of the following: ability to record and send messages; retrieve and respond to messages; create personal greetings; forward messages with and without additional comments; password administration as both systems admin and subscriber level; increase and decrease message playback volume; skip messages; delete messages; restart/replay messages; and "help" option. Describe how your system does all of these.	_____
A. Traditional Voicemail Features - DESIRABLE		
A.23	Capture of calling parties names in voicemail headers of messages from other users on same system.	_____
A.24	System can substitute address book entries for ANI# in message headers.	_____
A.25	AA can support voiced/interactive voice options such as IVR.	_____
A.26	Message addressing via TUI by spelling name on keypad.	_____
B. Unified Communications Features - MANDATORY		
B.1	Voicemail system interoperates with leading softswitch vendor platforms. List softswitch vendor platforms that meet this requirement.	_____
B. Unified Communications Features - DESIRABLE		
B.2	System provides a "unified communications" solution that allows voicemail subscribers to access, manage and utilize voicemail messaging from their desktop computers and e-mail clients (PCs and Macs). Describe how this is achieved and include any global hard limits such as simultaneous IMAP sessions or simultaneous web client sessions.	_____
B.3	Features and functionality are packaged as the System's base product. Describe in detail which features and functionality are included in your base System, and which require additional per-seat licensing, if any.	_____
B.4	System solution is provided from a single vendor. If features or functionality are available through a third party, describe which components, and further detail the nature of the 3rd party relationship or partnership. Also, describe which System components are required to be provided by Offeror and which could be provided by the University and certified by Offeror.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
B.5	Create, send, receive, playback, and save voice messages from desktop computers (PC's and Mac's). Describe how your System complies with this requirement.	_____
B.6	Create and edit voicemail mailing lists and personal address books from desktop computers (PC's and Mac's). Describe how your System complies with this requirement.	_____
B.7	Create and edit shared voicemail mailing lists and shared address book from desktop computers (PC's and Mac's). Describe how your System complies with this requirement.	_____
B.8	Message Organization: For all voicemail messages, ability to create and manage or administer multiple personal folders on desktop computers (PC's and Mac's) and server message store as desired. Describe how your System complies with this requirement.	_____
B.9	Message Organization: For all voicemail messages, ability to create and manage or administer multiple personal folders on desktop computers (PC's and Mac's) and server message store as desired. Multiple separate users can be supported on the same desktop computer. Describe how your System complies with this requirement.	_____
B.9	Message Notification: Notify subscriber of new messages via MWI on phone set, if available, and via software application on desktop computer (PC and Mac). Describe how your System complies with this requirement.	_____
B.10	Notifications: subscriber configurable alerts of new voicemail messages using SMTP (e-mail).	_____
B.11	Notifications: subscriber configurable alerts of new voicemail messages using any phone number (outcalling security provisions permitting).	_____
B.12	System provides "find me/follow me" feature functionality. Describe how your System allows users to direct calls when away from their desk/office. Include how subscriber would set this up and maintain preferences here.	_____
B.13	Find Me/Follow Me: capability can be enabled or disabled individually per subscriber.	_____
B.14	FAX: Create, send, receive, view, save and print faxes from desktop computers (PC's and Mac's). Describe how your System complies with this requirement.	_____
B.15	FAX: Create and insert fax cover page from desktop computers (PC's and Mac's). Describe how your System complies with this requirement.	_____
B.16	Automated Voicemail Forwarding (AVMF) or the ability to forward voicemail messages as e-mail messages: System supports .wav message encoding formats. For example, the ability to forward a voicemail message as an e-mail attachment to someone not on the voicemail System. Describe all available message encoding formats supported.	_____
B.17	(AVMF): subscribers can set forwarding preferences for forwarding voicemail. Describe how your System meets this requirement.	_____
B.18	AVMF: subscriber options include "voicemail only" (no forwarding); "voicemail and forwarded" (both); and "forward only" (no voicemail).	_____
B.19	AVMF: enforcement of message encoding format on system-wide basis. Describe to what extent message encoding format can be enforced on a system-wide basis.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
B.20	AVMF: user selectable message encoding format. Describe the extent to which message encoding format can be user selectable.	_____
B.21	AVMF: messages are forwarded using (E) SMTP protocol.	_____
B.22	AVMF: SMTP forwarded messages support TLS (Transport Layer Security) protocols .	_____
B.23	Notifications: subscriber configurable alerts of new voicemail messages using SMS.	_____
B.24	Notifications: subscriber configurable alerts of new voicemail messages using alphanumeric/numeric pager.	_____
B.25	Notifications: subscriber configurable alerts of new voicemail messages using Instant Messaging (IM). If IM alerts are available, describe what IM infrastructure is required, if any, and what systems IM is compliant with (jabber, yahoo, MSNM, etc.)	_____
B.26	Ability to place outbound calls from within the system during message retrieval and as a standard out dial option.	_____

C. System Administration, Integration & Standards Compliance - MANDATORY

C.1	Integration & Standards: System fully integrates with University's existing Meridian telephone system. Describe, in detail, your recommended Meridian PBX integration method(s), assuming service quality, ease of maintenance and system stability are all first priority. List all hardware and software required.	_____
C.2	Integration & Standards: System supports various Meridian PBX integration methods (QSIG, SIP, H323, etc.). In addition to the integration method(s) recommended under C.1 above, list all additional currently available and supportable Meridian PBX integration methods. Include all hardware and software required for these options, and describe in detail the advantages and disadvantages of each.	_____
C.3	Integration & Standards: System integrates with standards-based LDAP authentication and authorization systems. Describe how system can make use of existing directory services, specifically standards-based LDAP, and list any LDAP attributes and/or schema that are required to integrate system into existing authentication, authorization and directory services.	_____
C.4	Integration & Standards: IMAP Protocol interoperability – must comply with RFC 3501 (IMAP V4 rev1), RFC and related RFCs) for voice message retrieval.	_____
C.5	Integration & Standards: System supports variable length extensions up to 7 digit dial plans with non-contiguous ranges.	_____
C.6	Integration & Standards: System supports SIP. Describe how your system meets this requirement.	_____
C.7	System Administration Options & Interfaces: System administrator access requires unique user IDs for each administrator.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
C.8	System Administration Options & Interfaces: System provides a secure web-based interface for performing subscriber account and system administrative tasks. Describe how your system meets this requirement.	_____
C.9	System Administration Options & Interfaces: subscriber account administrative tasks are scriptable (to ease administrative burden of bulk and/or repetitive tasks). Describe how your system meets this requirement.	_____
C.10	System Administration Options & Interfaces: all subscriber account and system administrative tasks can be performed both locally (at system console) and remotely (away from console). Describe how your system meets this requirement.	_____
C.11	System Administration Options & Interfaces: System provides for secure delegation of system administration tasks via flexible assignment of administrative privileges and accounts. Describe in specific detail how your system meets this requirement.	_____
C.12	System Administration Options & Interfaces: System and software administration can be done via separate, individually assigned, unique login accounts and passwords. Specify all areas where administration would typically be or must be done using built-in or designated account information (e.g., "Administrator", "Root", "sa", etc.).	_____
C.13	System Administration Options & Interfaces: Class of Service (COS)– minimum of 16 levels of COS available at systems administration level to set subscriber parameters and includes ability to set: total storage, message retention times, out dialing permission, toll out dialing, notification settings, use of "find me" service, auto attendant configuration permissions. Global feature template – ability to change settings in one COS that in turn changes settings for all subscribers assigned to that COS. Describe how your system meets this requirement, note where system fails to provide any of the items listed, and indicate maximum available COS levels.	_____
C.14	Client (Subscriber) Administration: System allows for subscriber access to voicemail store using a Web browser. List all Web browsers supported.	_____
C.15	Web-based subscriber access to voicemail system: System allows subscribers to access voicemail store via the web. Describe in detail how your system meets this requirement. Create a grid showing major client OS/web browser combinations along one axis, subscriber voicemail system access functionality along the other axis, and then within the grid indicate where full, partial or no system functionality is supported. Provide additional information (footnotes with details) if additional plug-ins, 3rd party software, or other nonstandard settings and/or software are required. Also provide sufficient supporting explanations for any "partial functionality" responses in your grid. OS will include Windows, Mac OS X, and Linux. Browsers shall include Firefox, IE and Safari. Supply all major version information for OS and browsers supported.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
C.16	Web-based subscriber access to voicemail system: System must allow subscribers to access voicemail self-administration settings via the web. Describe in detail how your system meets this requirement. Create a grid showing major client OS/web browser combinations along one axis, subscriber self-administration access functionality along the other axis, and then within the grid indicate where full, partial or no system functionality is supported. Provide additional information (footnotes with details) if additional plug-ins, 3rd party software, or other nonstandard settings and/or software are required. Also provide sufficient supporting explanations for any "partial functionality" responses in your grid. OS will include Windows, Mac OS X, and Linux. Browsers shall include Firefox, IE and Safari. Supply all major version information for OS and browsers supported (e.g., Firefox 1.7, IE 6.0, Windows XP, etc.)	_____
C.17	Subscriber Self-Service: voicemail subscriber must be able to manage/administer settings, configurations and customizations via standard TUI. Describe all user options available for compliance with this requirement.	_____
C.18	Interface: Voicemail system interfaces with the existing Nortel Communication Server 1000M with either PRI or SIP. Indicate PRI, SIP or both.	_____
C.19	Integration: Voicemail system integrates with Nortel CS1000M 4.5 software and existing hardware cards. The Nortel CS1000M may be upgraded to revision 5.5. If there are any incompatibilities with these 2 revisions, explain.	_____
C.20	Integration: Provisioning of voicemail accounts is integrated with the provisioning of lines in the Nortel PBX. If a separate provisioning system is required, please describe.	_____
C. System Administration, Integration & Standards Compliance - DESIRABLE		
C.21	System support 10 digit dial plans.	_____
C.22	System Administration Options & Interfaces: a command line (shell-based) interface is provided for performing subscriber account and system administrative tasks. Describe how your system meets this requirement.	_____
C.23	Client (Subscriber) Administration: System allows for subscriber access to some voicemail settings (account self-administration) using Web browser. Describe all web accessible voicemail settings and list all web browsers supported.	_____
C.24	System Administration Options & Interfaces: If a purpose-built software application or plug-in needs to be distributed and installed in order to use Unified Communications features, application has features built in to reduce system administration overhead (can be distributed pre-configured, etc.). Describe how your system meets this requirement.	_____
D. Hardware, Backups, Recovery, Sizing & Redundancy - MANDATORY		
D.1	System capable of initially supporting 6,000 voicemail subscriber accounts and scale easily to 10,000. Show and describe, in detail, the hardware configuration for 6,000 subscribers, and any additions required to scale to 10,000. Include any global hard limits for voice mailboxes and subscriber accounts.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
D.2	System Redundancy/Recovery: after a system component failure, voicemail transactions that were in progress at the time of the failure continue processing without any intervention, such as system/server reboot, required by system administrator.	_____
D.3	System Backup/Recovery: System allows for network backup and restoration of systems, names data. Describe how this requirement is achieved.	_____
D.4	System Backup/Recovery: System allows for network backup and restoration of subscriber messages. Describe how this requirement is achieved.	_____
D.5	System Backup/Recovery: System allows for "bare meta" recovery procedure e.g., after a server has been completely lost and replaced with new hardware. Describe procedure.	_____
D.6	System Backup/Recovery: System backup and restore processes have minimal impact on service to subscribers. List any and all system backup and restore/recovery processes that are service affecting both from a subscriber's and an administrator's perspective (e.g., prevents access to, reduces feature functionality, reduces speed or processing capabilities from normal runtime operation, etc.).	_____
D.7	System Backup/Recovery: Ability to restore individual subscriber messages (e.g., one user wants his/her voicemail messages restored). Restoring a user's complete voicemail spool from backup does not impact ability of other subscribers to use the system. If there is any impact in your proposed system, describe, in detail, what subscriber services are impacted.	_____
D.8	Hardware: System component servers must be 19" rack mount servers. Describe, in detail, the equipment rack space, power, cooling and any other pertinent facilities infrastructure requirements of your system.	_____
D.9	Hardware: System components must have redundant power supplies, allowing System to run off separately sourced power inputs (i.e., separately corded power supplies). Power supplies must be sized to allow System to run off one power supply/source at full load.	_____
D. Hardware, Backups, Recovery, Sizing & Redundancy - DESIRABLE		
D.10	Hardware in proposed system is comprised of industry-standard commodity components available on open market. Detail any exceptions to this requirement.	_____
D.11	System Redundancy/Recovery: System provides storage and hardware redundancy. Describe the redundancy of each system component.	_____
D.12	System Redundancy/Recovery: redundant system components have automatic failover to functioning components to maintain functioning state of operation during failover. Describe how your system meets this requirement.	_____
D.13	System Backup/Recovery: System can be backed up/restored using 3rd party industry standard backup software. List compatible 3rd party software agents.	_____
D.14	Voice messaging system components can be networked to provide reliable service to separate geographic locations while still being managed and administered as a single system.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
D.15	System able to serve as a primary voicemail system with a second voicemail system serving as a backup at another site. In the event of a total failure to the primary voicemail system, the backup system takes over full voicemail functionality. Describe how your system meets this requirement.	_____
D.16	All supplied systems hardware comes equipped with redundant array of inexpensive disks (RAID) for operating systems, and data store redundancy, respectively, to protect against outages from drive failures.	_____
D.17	Hard drive RAID systems can be monitored for health via onboard hardware or software, and SMTP or SNMP notifications will be sent when System health is not optimal.	_____
E. System Maintenance & Upgrades - MANDATORY		
E.1	Offeror has a 24x7, toll free support line.	_____
E.2	Offeror provides next business day delivery of parts to Hawaii.	_____
E. System Maintenance & Upgrades - DESIRABLE		
E.3	Offeror provides spare part kits. Describe what is included in the kit.	_____
F. System Alarms & Notifications - MANDATORY		
F.1	Able to monitor system performance and availability for both hardware and software components, and receive corresponding notifications and/or alarms at system console and remotely (away from console). Describe how your system meets this requirement to include how hardware and software components are monitored for availability and performance, how notifications/alarms can be configured, how alarm trigger events can be customized or thresholds adjusted (e.g., disk free space warnings).	_____
F.2	System alarms can notify via SNMP and SMTP.	_____
F.3	System processes and services can be internally (system console) and externally (away from system console) monitored for availability and performance.	_____
F.4	Customer can clear all alarms without requiring vendor (or other outside 3rd party) intervention. Describe how your system meets this requirement and detail any alarms that cannot be cleared by customer.	_____
F.5	System provides alarms and notifications for following conditions: a) subscriber authentication failures, b) system administrator authentication failures, c) database corruptions, d) failed subscriber access attempts, e) server to server connection drops for any System component, f) failure to write message to disk, g) LDAP query failures from any System component, h) System capacity/quota problems.	_____

Item	Functional/Feature Description	Feature Availability (Yes/No)
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G. Logging, Debugging & Tools - MANDATORY

- G.1 System provides various logging options. Describe, in detail, what logging options are available, what services are logged, levels of logging detail available, and options for logging elsewhere using syslogd or other protocols (list those). _____
- G.2 Logging captures system administrator activity. Describe how your system does that. _____
- G.3 Logging captures system subscriber (user) activity. Describe how your system does that. _____
- G.4 Logging system provides for optional ability to increase information level/detail in order to debug and/or troubleshoot system hardware and software errors. Describe, in detail, how your system meets this requirement. _____
- G.5 Logging system provides for optional ability to increase information level/detail in order to debug and/or troubleshoot subscriber account errors. Describe, in detail, how your system meets this requirement. _____
- G.6 System provides diagnostic and debugging options and tools. Describe, in detail, what diagnostic and debugging options are available and what tools are provided. Include information about what services and processes can be observed with these tools, and what information can be obtained. Emphasize how these tools can be used to diagnose issues with subscriber sessions (TUI, IMAP, POP, Web, and any other supported sessions). _____
- G.7 System is capable of allowing more than one administrator to do "Adds, moves, changes" (MAC) at one time, but disallow multiple access to the same mailbox or AA. _____

G. Logging, Debugging & Tools - DESIRABLE

- G.8 System administrator able to turn on complete logging of a session (TUI, IMAP, POP, Web, etc.) showing each command executed and the results of that command. _____

H. System Utilization/Operations Information & Statistical Tools - MANDATORY

- H.1 System provides statistics tools that provide the following over a defined period of time: AA usage by the option key pressed by layer. _____
- H.2 Logging tools capture the following over a defined period of time: a) subscriber authentication failures, b) system administrator authentication failures, c) database corruptions, d) failed subscriber access attempts, e) number of server to server connection drops to any System component, f) number of LDAP query failures from any System component, g) System capacity/quota problems. _____
- H.3 System administrator has access to various levels within the System. Describe what level of administrator access is available (root/administrator, or some lesser level). If access is less than root/administrator, describe what operations administrator is restricted or limited to. _____

Item	Functional/Feature Description	Feature Availability (Yes/No)
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H. System Utilization/Operations Information & Statistical Tools - DESIRABLE

- H.4 System provides statistics tools that provide the following over a defined period of time: a) number of user accounts, b) number of simultaneous TUI sessions, c) number of simultaneous e-mail client software sessions, d) number of simultaneous Web browser sessions. Include whether the timing interval for producing these statistics is configurable by systems administrator.

I. Audible Indicators - MANDATORY

- I.1 Subscriber is presented with an audible sound (interrupted or stuttered dialtone) indicating status of a voicemail message via the TUI (unread) as required for analog phones without MWI.

J. System Security & Patches - MANDATORY

- J.1 System OS and software patches must be pre-approved (vetted) by vendor before they are installed in System. List the components of System for which offeror will supply and/or pre-approve software (OS and application) patches. Describe, in detail, your process for OS patches for System servers and System application software patches. Include all patches you typically provide, those you don't, and those that are negotiable. For those you provide, with what frequency are patches vetted and released to customer. How do you handle software component patches (e.g., MS Exchange, SQL server, etc.) for System servers? If OS or software component patches are not vetted and/or supplied by offeror, describe your support and/or policy regarding OS patching by client or 3rd party should problems arise from such patching activity.
- J.2 Offeror pro-actively informs users of security patches for System. Describe how you will meet this requirement.
- J.3 If outbound calling from System is offered, the System has strong security/fraud detection controls. Describe, in detail, how your System meets this requirement.
- J.4 Web access for System software and subscriber account administration is encrypted. Describe how your System meets this requirement.
- J.5 System administration access to System components are available using secure protocols (ssh, https), insecure protocols (telnet, http) and can be disabled without limiting administrative access and functionality.
- J.6 Subscribers can set their personal passcode (password) when entering the System for the first time with the System default passcode (password). Describe how your System meets this requirement.

Item	Functional/Feature Description	Feature Availability (Yes/No)
J.7	Different logins and passcodes are required for different means of access to the System (e.g. TUI vs. Gui, etc.) Describe to what extent, if any, different logins and passcodes are required.	_____
J.8	System solution includes security features. Describe, in detail, the security features of your System to minimally include any host based or network based IDS (intrusion detection system) and any fraud detection means.	_____
J.9	System administrator has the ability to reset a subscriber's passcode (password) but cannot view the passcode. Describe how your System meets this requirement.	_____
J.10	System administrator has the ability to reset another administrator's passcode (password) but cannot view the passcode. Describe how your System meets this requirement.	_____
J.11	System administrator can enforce minimum password length and password aging requirement for subscriber accounts.	_____
J.12	Voicemail messages passed over the network are encrypted. Describe, in detail, how your System meets this requirement to include the encryption method/mechanism used and the strength of that encryption. Describe options for encrypting system and subscriber data backup network traffic.	_____
J.13	Server and client components can be configured to use only encrypted (no clear text) passwords over the network. Describe, in detail, how your System meets this requirement.	_____
J.14	System use encrypted passcodes (no clear text) when user enters passcodes through GUI or TUI.	_____

J. System Security & Patches - DESIRABLE

- | | | |
|------|---|-------|
| J.15 | System must work behind network firewalls to include Juniper NetScreen and Cisco PIX. List what hardware firewalls your solution is certified to work behind (e.g., subscribers and administrative access available through firewall). List minimum firewall OS required. | _____ |
| J.16 | Ability to sync any pre-configured system account (e.g., "root", "Administrator") administrator passcodes (passwords) for all servers in the System. | _____ |
| J.17 | System provides ability to configure file encryption on disk for subscribed data and/or system data. Describe what may be encrypted and how it's done. | _____ |

APPENDIX D REFERENCES

Provide the name of company, address, contact name, and phone number for at least THREE (3) references.