

Ohio University Purchasing & Contracting Office
Request for Proposal #: 10-020MG
Name: Web Portal
Due: 2:00PM EST September 4, 2009

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Date of issue: 8/18/09

Table of Contents

SECTION 1	GENERAL INFORMATION	1
1.1	PROPOSAL DESCRIPTION	1
1.2	ALTERNATES AND VARIATIONS FROM REQUIREMENTS	1
1.3	METHOD OF AWARD	1
1.4	COMPLIANCE WITH FEDERAL, STATE AND LOCAL LAWS	1
SECTION 2	INSTITUTIONAL BACKGROUND	2
2.1	GENERAL	2
2.2	SPECIFIC HISTORY AND CURRENT INFORMATION	2
SECTION 3	SCOPE OF WORK.....	3
3.1	DESCRIPTION.....	3
3.2	OBJECTIVE.....	3
3.3	REQUIREMENTS.....	3
3.4	TIMELINE.....	5
SECTION 4	PROPOSAL EVALUATION.....	6
4.1	EVALUATION CRITERIA (IN NO PARTICULAR ORDER).....	6
4.2	METHOD OF EVALUATION	6
4.3	NEGOTIATIONS	6
SECTION 5	INSTRUCTIONS FOR BIDDERS.....	7
5.1	RECEIPT AND OPENING OF PROPOSALS	7
5.1.1	<i>Deadline & Delivery</i>	7
5.1.2	<i>Mailing the Response</i>	7
5.1.3	<i>Faxing the Response</i>	7
5.1.4	<i>Emailing the Response</i>	7
5.2	PREPARATION OF PROPOSALS	8
5.3	QUESTIONS REGARDING THIS PROPOSAL	8
5.4	ADDITIONAL TERMS & CONDITIONS OF SUBMITTING A PROPOSAL	8
5.4.1	<i>Costs incurred by bidder</i>	8
5.4.2	<i>Signature & submission</i>	9
5.4.3	<i>Obtaining clarification</i>	9
5.4.4	<i>Freight Terms</i>	9
5.4.5	<i>No Bid Requirement</i>	9
5.4.6	<i>Contractual obligations</i>	9
5.4.7	<i>Sales Tax</i>	9
5.4.8	<i>Formal & Informal RFPs/Proposal opening</i>	9
5.4.9	<i>Proprietary Information</i>	9
5.4.10	<i>Use of Ohio University's Name</i>	9
5.4.11	<i>Gratuities and gifts</i>	10
SECTION 6	PROPOSAL RESPONSE SHEETS	11
6.1	TERMS & CONDITIONS.....	11
6.2	REFERENCES:	12
6.3	FAX RELEASE DOCUMENT	13
6.4	DETAILED REQUIREMENTS AND QUESTIONS	14
6.4.1	<i>Branding Requirements</i>	14
6.4.2	CONTENT REQUIREMENTS	16
6.4.2a	<i>Content Search Requirements</i>	21
6.4.2b	<i>Content Monitoring and Reporting Requirements</i>	22
6.4.3	NAVIGATION REQUIREMENTS.....	23
6.4.4	<i>Technology Requirements</i>	24
6.4.6	<i>General Questions</i>	29

Section 1 General Information

1.1 Proposal Description

Ohio University of Athens, Ohio (hereafter called The University) invites proposals for the Web portal initiative described herein. The University will receive proposals at the Purchasing & Contracting Office, Ohio University, PO Box 640, Athens, OH 45701. If a street address is needed, replace the PO Box number with "213A HDL Center." Proposals are due at 2:00PM EST September 4, 2009. The package containing the proposal must be sealed, addressed to the attention of Matt Gibbs, and designated as Proposal #10-020MG.

1.2 Alternates and Variations from Requirements

Wherever items or services have been specifically described, such identification is descriptive and not restrictive. It indicates the quality and characteristics that are satisfactory. If the bidder has an equal, alternative proposal, that alternative must be clearly and completely described. The University will consider alternates that meet or exceed the quality and characteristics specified. The University is not bound to accept any proposals that are not in its best interest. The determination as to acceptability of the alternate offered is the responsibility of the University, and will be based on information furnished by the bidder, as well as information reasonably available to the University. Unless the bidder clearly indicates that an alternative is being offered, it will be assumed that the proposal meets the requirements exactly as specified in this document. CAUTION TO BIDDERS: It is not the responsibility of the University to secure any information not identified in the bidder's response. Information furnished may include specific references to catalogs, brochures, or other material previously furnished. Otherwise, such information must accompany the proposal.

1.3 Method of Award

Awards for goods and services will be made to the bidder(s) providing the lowest responsive and responsible proposal. The University reserves the right to reject any or all proposals and is not bound to accept the lowest-cost proposal if that proposal is not in the best interests of the University. In making an award, factors such as the firm's service capability, integrity, facilities, equipment, reputation and past performance will be weighed. In the event of a tie, the proposal that was date stamped into the Purchasing & Contracting Office first will receive priority consideration.

1.4 Compliance with Federal, State and Local Laws

Any vendor warrants, in submitting a proposal and in the performance of any resulting award, that they have complied with or will comply with all applicable federal, state, University and local laws, ordinances and all lawful orders, rules and regulations thereunder. The vendor agrees: 1) Not to discriminate against any employee or applicant for employment because of race, color, creed, religion, sexual orientation, national origin, sex, age, handicap or Vietnam era veteran status, 2) That every sub-contract for any ensuing order will contain a provision requiring non-discrimination in employment as specified above, and 3) That it is not now, and will not become subject to an unresolved find for recovery under ORC 9.24, prior to the award of any contract or agreement arising out of this RFP, without notifying the University of such finding. This covenant is required pursuant to Executive Order 11246, Laws and Regulations of the State of Ohio. Any breach thereof may be regarded as material breach of contract or purchase order and cause for cancellation.

Section 2 Institutional Background

2.1 General

Ohio University was chartered by the state of Ohio in 1804. It is a state-assisted University, with a total enrollment exceeding 28,000 students. The main campus in Athens, Ohio, has an enrollment of approximately 19,000 students. The remaining 9,000 students are served by five regional campuses in Ironton, St. Clairsville, Lancaster, Zanesville, and Chillicothe as well as College of Osteopathic Medicine sites. The University employs an estimated 3,500 full and part-time faculty and staff.

2.2 Specific History and Current Information

Currently, the University uses various methods of electronic communication but does not have an enterprise-wide Web portal. Different areas of the University use different solutions for various needs, including: *(seems to be a list of needs, not a list of solutions)*

- News and communication
- Applications access
- Bill payment
- Email
- Calendar access
- Chat
- “A-to-Z” communication with students
- Event and room scheduling
- Emergency notification
- Tracking of status and trends
- Assignments and workflow

The goal of the new Web portal initiative will be to provide all the required functionality in a single solution.

In addition, Ohio University is currently in the process of procuring an identity management system by October 2009. The successful bidder will be expected to collaborate with the chosen identity management system vendor.

Section 3 Scope of Work

3.1 Description

The successful bidder will develop and implement a Web portal for Ohio University by August 2010 that will meet requirements in the areas of branding, content, search functions, monitoring and reporting, navigation, technology, and security and role management. The bidder will recommend the use of either uPortal or Oracle Portal as the software product, and will respond to this RFP by describing how the recommended product may or may not be used. If the bidder would like to offer both products as a solution, please provide two responses. The bidder must also provide information about how they will facilitate knowledge transfer, including documentation and training.

3.2 Objective

As an institution of higher education, Ohio University is constantly adapting to changes in the educational marketplace, facing competitive pressures from traditional and online institutions and facing more and more federal and state regulatory scrutiny. These changes in turn depend upon improved process controls, better information sharing, and more effective use of intellectual assets. Ohio University desires to develop a portal to gain:

- More effective process management of students, faculty and staff
- Information sharing tools, including content/document management, project collaboration tools, and multi-platform search and navigation
- A single point of access to management information, such as data warehouses and related business intelligence repositories
- A single, consistent place for information and application services
- Dashboard-style interface integration, including personalization

Ohio University's portal definition:

The OHIO portal will integrate information, people, processes and resources across institutional boundaries to provide a secure, single sign-on access point for information, communication and transactions as defined by the characteristics of the user.

The successful OHIO portal will allow for de-centralized content contribution and content management, ensuring that the information and communication on the portal is current.

3.3 Requirements

Requirements must be considered in the following areas. These are primary, current requirements for bidders. However, functionality (or service, or technical needs) desired may be refined throughout the selection process, as the University selection committee becomes more familiar with options available. See section 6 for specific requirements.

3.3.1 *Branding*

A brand and design is important to the success of the Ohio University portal. The Ohio University Web site has been revamped with a more consistent look and feel, and easier navigation. A portal will need to be flexible enough to include the same branding theme and design guidelines that have been established. In addition, the portal will not replace the current Web site, which will continue to serve a much broader audience than those who will use the portal.

While the look of the portal is important, Ohio University advocates that “form follow function” and strongly supports ease of use, relevant and fresh content, and clarity in navigation above branding. The University’s Communications and Marketing unit should have a role in the initial deployment and ongoing development of the portal as branding and design is part of the overall user experience, and key to building the online relationship with users.

3.3.2 Content and Navigation

The key to a portal is maximizing the ability to provide access to information and user transactions. A variety of applications serve Ohio University students, faculty, staff, parents, prospective students, alumni and visitors in everyday business transactions and information gathering tasks. Users can become frustrated trying to easily find content and information. Carefully organized navigation will be just as critical as the content it contains. Navigation should help point users to content that is external to the portal as well (i.e., information residing on University, college or departmental websites). This will require careful planning and mapping of existing data and content as it resides on systems across the University.

Equally important was the expressed need to, not only organize content, but to make that content relevant to the role of that user. Content and navigation to that content should be controlled and secured based on the user’s role in the system. This will help to filter out data that is irrelevant to the user.

One of the most requested needs is for better and more instantaneous communication -- not only critical communication (i.e. emergency alerts), but the consolidation of communication from many different sources into one place. This would ensure that communication related to classroom changes, class assignment postings, holds, and checklist items are communicated in an effective way. The portal should allow the user to make a choice as to how these communications are delivered (i.e., email, text messaging, a portal announcement, or to-do list).

Ohio University is open to allowing trained end users in the Colleges, departments, and even students groups and organizations to develop content through a common workflow approval process.

3.3.3 Technology

The vendor should describe its approach for the design, development, testing, and deployment of automated interfaces between the various ERP systems and other University systems. The vendor should be responsible for the development and deployment of a set of standard inbound and outbound interfaces for Ohio University to process transactions to and from the Portal and all the various applications systems. The vendor will also be responsible for developing all required temporary interfaces due to Ohio University’s intended phased deployment approach. For each required interface, services to be provided by the vendor should include (but are not limited to):

- Interface design
- Interface development
- Testing
- Development of procedures that support interface operations.

Critical to choice is scalability, versatility and “openness.” Ohio University runs administrative applications on Oracle or MS SQL Server databases, using Red Hat Linux or Windows operating systems.

The implementation timeline is tight and training on new technology and development tools will have an impact on deployment.

Security is of the utmost importance to Ohio University. The vendor will need to describe in detail, its approach to analyzing, establishing, and documenting security functions across all software modules, and integrating these security functions into the Ohio University's security network. The vendor should outline options for configuring application security that OHIO University may want to consider, and advantages or disadvantages of proposed approaches.

The successful bidder should provide strategy and training plans, as well as various types of training itself, including, but not limited to:

- Project team functional training
- Project team technical training
- End-user training (through the use of a train-the-trainer approach)
- On-going training after the system is in production (e.g., new hire training, "refresher" training, and training on new software functionality).

The bidder also should describe its approach to issue identification, tracking, and resolution. This discussion should include the use of any tools or techniques that are integrated into configuration management, software change control, and the overall project management methodology. Topics to be addressed in this section include:

- Issue identification
- Issue tracking
- Issue review and prioritization
- Issue analysis
- Issue resolution
- Issue escalation.

In addition, the Vendor should describe its approach to making enhancements or modifications to the portal in a manner that facilitates an easy, low-cost, and low risk migration to new releases of the baseline product. The Vendor should describe its approach to coding and documenting modifications in such a way as to ensure that they can be easily re-applied when Ohio University upgrades to new releases of the proposed software. The Vendor should also include its business-justification process for prioritizing and approving each of the identified potential enhancements.

3.4 Timeline

Ideally, the award for this project would be made no later than September 2009, with go-live no later than August 2010:

Current portal deployment timeline

Milestone	Deadline
Requirements Gathering	July 16, 2009
RFP Draft Complete	August 1, 2009
Procurement Complete	September 2009
Implementation Begins	October 2009
Final Testing and Review	July 2010

<i>Go-live Deployment</i>	<i>August 2010</i>
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Section 4 Proposal Evaluation

4.1 Evaluation Criteria (in no particular order)

- Economic Costs and Benefits: *Overall price and cost efficiency of purchase*
- Quality and adequacy of response: *Completeness, responsiveness, clarity*
- Technical issues: *Compatibility with existing systems, ease of installation and maintenance*
- Ability to meet requirements as described
- Ability to meet timeline as described
- Demonstrated success of the bidder's firm and/or specific products and/or methods offered, to provide items and services as requested.
- Commitment to, and stated success with, emerging technologies: SMS, Viral (Social) marketing, API's, IM, etc.

4.2 Method of Evaluation

Responses will be reviewed by qualified University representatives. Bidders selected after preliminary proposal evaluations may be asked for further information and clarification, and/or to give an oral presentation. Individual interviews may be held with prospective firms, and site visits may be required.

4.3 Negotiations

The University reserves the right to conduct discussions with bidders, and to accept revisions of proposals, and to negotiate price changes. During this discussion period, the University will not disclose any information derived from proposals submitted. Once an award is made, proposal documents are public record and will be disclosed upon request (see Additional Terms & Conditions, in the Instructions for Bidders Section, below).

Section 5 Instructions for Bidders

5.1 Receipt and Opening of Proposals

5.1.1 *Deadline & Delivery*

Ohio University will receive proposals at the Purchasing & Contracting Office until 2:00PM EST, September 4, 2009. Firms submitting proposals will be responsible for delivery of the documents to the proper place and prior to the time of the proposal opening (as specified above). Any proposal received after the time and date specified or improperly marked, prepared or submitted, may not be eligible for consideration and may be returned unopened.

5.1.2 *Mailing the Response*

Proposals may be sent to Ohio University, Purchasing & Contracting Office, PO Box 640, Athens, Ohio, 45701, Each proposal must be submitted in an envelope (or other container), bearing on the outside the name of the firm submitting the proposal, the firm's address, and the proposal number and name. If a street address is necessary, replace the PO Box number with "213A HDL Center". Proposal documents must be delivered to, and date stamped into, the Ohio University Purchasing & Contracting Office prior to the due date and time. The bidder is cautioned against last minute, exclusive reliance on overnight carriers to meet the due date & time. The University's relatively remote location sometimes results in late delivery.

5.1.3 *Faxing the Response*

Proposals that do not require any type of bond, deposit or sample may be submitted by fax ONLY IF the release statement (page 11) is signed and included with the faxed bid. The transmission/receipt date and time that are automatically printed on the faxed bid will serve as the official date stamp. Ohio University Purchasing & Contracting Office fax number is 740-593-2144. Bids submitted by fax must be immediately confirmed by dispatching the original copy via conventional carrier.

5.1.4 *Emailing the Response*

If all response pages and documents needed (e.g., descriptions, flyers) are available electronically, proposals may be emailed to Matt Gibbs: gibbsm@ohio.edu. The date and time that is generated by the University's oak email system will serve as the official date stamp. You must use the guidelines below to email your response. Failure to follow these guidelines could void your response:

- Email the response to the University official listed above only. Do not include any other recipient on the response.
- Email the response from a company email system – i.e., use only an email account provided by your firm. Do not email proposals from a personal email account.
- The Subject (i.e., the email message title) should be: *RFP 10-020MG Response*.
- Clearly identify yourself, your company, and the RFP number, in the body of the email.
- Do not include any proposal information in the body of the e-mail. Proposal information should be only in the attachments to the email. Attachments will not be opened until after the RFP due date.
- Include the following text in the body of the email:
I understand that the Ohio University Purchasing & Contracting Office will take care to protect the confidentiality of my proposal prior to the bid opening date and time. I also understand and acknowledge that as a result of my choice, to attach the proposal to this email, confidentiality cannot be assured in the traditional manner (e.g., unbroken seals). I assume full responsibility for my choice to email this proposal and for the lack of assured confidentiality inherent in that choice.

5.2 Preparation of Proposals

Proposals must be prepared on the forms provided. Bidders should also provide their own sheets/documents, as needed, to fully describe their proposal. All spaces are to be fully completed and all prices must be clearly set forth. Bidders are cautioned to write all descriptions and prices clearly so there is no doubt as to the intent and scope of the proposal. Erasures and other changes in the proposal must bear the signature or initials of the bidder. In the event of a price discrepancy, unit prices will prevail. ALL PROPOSALS MUST BE SIGNED.

Bidders must submit the following with their proposal:

1. Section 6 Response pages, completed and signed in Section 6.1.
2. Complete description of all items and services proposed.
3. Sample contract.
4. Separate pricing sheet(s) labeled "Appendix A: Pricing", if emailing proposal provide in a separate file. Provide the pricing, and the payment structure proposed. You may propose more than one option if desired (flat fee, hourly rate, price per connection, etc.). Include all possible costs and fees to the University, such as (but not limited to), travel, lodging, meals, etc.
5. 15 complete copies of the proposal. (Not necessary if response is emailed. Simply attach one copy of your proposal to the email, as directed above.)

Failure to provide this information may result in rejection of the proposal. The University reserves the right to reject any proposal not prepared and submitted according to the provisions herein outlined, and may reject any or all proposals. Any proposal may be withdrawn prior to the proposal due date, upon written request (mail, fax, or e-mail).

IMPORTANT NOTE: The bidder is cautioned against last minute, exclusive reliance on overnight carriers to meet the due date & time. The University's relatively remote location may result in late delivery.

5.3 Questions Regarding this Proposal

Questions about the items requested or about proposal procedure should be directed to Diana Pugh, Purchasing & Contracting Office, at 740-593-1967. The University will answer informal questions orally. No guarantee is implied as to the correctness of any oral answers; oral answers are provided solely to provide minor clarifications rapidly. Oral statements or instructions do not constitute an amendment to the Request for Proposal.

All formal requests for information and interpretation, about substantial issues that could result in an addendum to this Request for Proposal, should be directed to Matt Gibbs, in writing, as soon as possible. Requests can be e-mailed to gibbsm@ohio.edu, faxed to 740-593-2144 or mailed to the address shown above. All questions will be gathered and answered in an addendum, which will be sent to all bidders as soon as possible.

5.4 Additional Terms & Conditions of Submitting a Proposal

5.4.1 *Costs incurred by bidder*

The bidder, by submitting a proposal, agrees that any cost incurred by the bidder in responding to this RFP, or in support of activities associated with this request, are to be borne by the bidder and may not be billed to the University. The University will incur no obligation or liability whatsoever to anyone by reason of issuance of this RFP, or action by anyone relative thereto.

5.4.2 Signature & submission

Proposals must be dated, signed by an official authorized to bind the bidder to the terms of the proposal and submitted to the Ohio University Purchasing & Contracting Office in accordance with the terms and conditions of this RFP.

5.4.3 Obtaining clarification

All issues and questions raised in this RFP must be answered in full. Each bidder understands and agrees that it has a duty to inquire about and clarify any RFP issue that the bidder does not fully understand or believes may be interpreted in more than one way. Every attempt will be made to promptly answer all inquiries from each bidder.

5.4.4 Freight Terms

All prices quoted are to be F.O.B. Destination. Unless clearly stated otherwise by the bidder, prices quoted will include all charges for transportation, packaging, etc., necessary to complete delivery on an F.O.B. Destination basis.

5.4.5 No Bid Requirement

If you are unable to submit a proposal, please date and sign the Terms & Conditions sheet, and indicate "NO BID". Give a brief explanation, and return the sheet before the due date.

5.4.6 Contractual obligations

The contents of proposals submitted by the successful bidder will be considered contractual obligations upon award.

5.4.7 Sales Tax

The University, as an instrumentality of the State of Ohio, is exempt from Ohio sales tax and Federal excise tax, including Federal transportation tax.

5.4.8 Formal & Informal RFPs/Proposal opening

This is an informal RFP and will not be read at a public opening. Written requests for proposal results must include the Request for Proposal number and closing date. If the bidder wishes to obtain a copy of the proposal tabulation and/or evaluation form(s) once award is complete, bidder should provide a self-addressed, stamped envelope with the proposal.

5.4.9 Proprietary Information

All evaluation documents for proposals are non-proprietary and subject to public disclosure after contract award. All proposal documents and information are subject to public disclosure under Ohio Revised Code Section 149.43. To exempt information provided in the proposal from public disclosure, bidders should identify any and all sections of their proposal they consider trade secrets or proprietary information. In the event of a public document request, the Ohio University Legal Affairs Office will review the sections so identified, and will make the final determination as to the need to disclose. Bidders will be solely responsible for protecting their own trade secret or proprietary information, and will be responsible for all costs associated with protecting this information from disclosure. The University will keep one (1) copy of proposals in accordance with its record retention schedule.

5.4.10 Use of Ohio University's Name

No Supplier providing proposals, products or services to the University will appropriate or make use of Ohio University's name or other identifying marks or property in its advertising without prior written consent of Ohio University.

5.4.11 *Gratuities and gifts*

Gratuities are not acceptable. Ohio University, by written notice to Bidder, may immediately reject any proposal, or cancel any contract that results from this RFP, if the University finds that gratuities were given or offered. Gratuities are defined as gifts, entertainment, or any other compensation offered or given by the Bidder, or any agent or representative of the Bidder, to an Ohio University officer or employee, in an effort to secure an award or preferential treatment.

Section 6 **Proposal Response Sheets**

This section must be completed and returned with your proposal. This document has been prepared using Microsoft Word. If you do not have an electronic copy of this RFP and wish to obtain one, email Matt Gibbs at gibbsm@ohio.edu.

6.1 **Terms & Conditions**

Provide complete Company Name and address to which to send a Purchase Order (if awarded):

Fax number for order	
Website address	

Proposal Prices are valid for		days (a minimum of 60 days is preferred).	
FOB pt	Destination		
Payment Terms			
Representative name			
Rep Phone number		Fax number	
Email address			

For reporting purposes only:

Is bidder's firm a certified Minority Business Enterprise in the State of OHIO (Y or N)?

Certified with the State of Ohio as an EDGE Supplier?

Otherwise certified as a Disadvantaged Business Enterprise? (if yes, explain):

If needed, provide complete information about proposed terms and conditions on your own forms.

Signature | _____ Date | _____

6.2 References:

Provide a minimum of 2 and a maximum of 6 references. They should ideally be similar to Ohio University - i.e., mid to large size state-funded institutions of higher learning, who use PeopleSoft Campus Solutions 8.9 or higher, **and have contracted with the bidder for the same services and/or products**. If such references are not available, list references which match as closely as possible.

Company Name			
Address			
Contact Name & Title			
Phone		Email address	

Company Name			
Address			
Contact Name & Title			
Phone		Email address	

Company Name			
Address			
Contact Name & Title			
Phone		Email address	

Company Name			
Address			
Contact Name & Title			
Phone		Email address	

Company Name			
Address			
Contact Name & Title			
Phone		Email address	

Company Name			
Address			
Contact Name & Title			
Phone		Email address	

6.3 Fax Release Document

(Faxed Proposals will not be accepted unless this sheet is signed and faxed along with the proposal)

Attn: Matt Gibbs

Re: RFP #10-020MG

In order to meet the specified proposal opening date and time, this proposal is hereby submitted via fax. I understand and acknowledge that the proposal contents cannot therefore remain completely confidential until the time of proposal opening. The signature below certifies that I understand the Ohio University Purchasing & Contracting Office will process my proposal in accordance to standard University procedures, taking care to protect confidentiality. However, I assume full responsibility for this fax, and the lack of confidentiality inherent in the process of faxing a proposal.

Signature: _____

Date: _____

Company name: _____

6.4 Detailed Requirements and Questions

Detailed requirements and questions are presented below for each topic area. Requirements are presented in a chart with a column for yes/no answers and a column for notes. Ohio University has designated the importance of each requirement as follows:

R*: Required as part of initial implementation phase by August 2010

R: Required as part of a later phase if needed (phase timeframes to be determined in contract negotiations)

D: Desired as part of overall Web portal initiative

Please only provide pricing for the requirements listed as R* ONLY. We will use these responses to help determine future costs.

Questions for each topic area follow each requirements section. Please respond to each requirement and answer each question realistically and to the best of your ability based on the recommended portal product. For questions, provide a “Yes or No” answer as appropriate, and then provide further details to explain your answer fully. Please provide responses directly below the question or in a similar format that allows easy reference back to the original list of questions.

Before beginning to answer the questions below, let us know which portal product you are recommending (uPortal or Oracle). If you wish to recommend both, provide separate responses for each.

RECOMMENDED PORTAL PRODUCT	Reasons for Recommendation

6.4.1 Branding Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Allows full customization of look and feel of portal design	R*	<i>Colors, images, logos, links, shades, shaping, tabs, fonts; Must allow the University to manage and control style and branding directly</i>		
Supports placement of interactive media	D	<i>Videos, slideshows, audio,</i>		
Branding is “locked” into templates and can only be updated by key individuals	R*			
Is software “agnostic” in accepting a multitude of media formats	R*	<i>i.e. .jpg, .gif, .png, .mp4, etc.</i>		
Is browser “agnostic”; should work across various web browsers	R*	<i>i.e. Firefox, Opera, Chrome, mobile browsers</i>		
CSS compliant	D	<i>Allows full flexibility for design and branding</i>		

Allows for user configured style sheets to control pages and pagelets	D			
Allows users to select alternate style sheets, based on user role/security?	D			
Allows for importing of content from external HTML editors	R*			
Recognizes standard HTML formatting tags	R*			
Application includes an HTML editor, allowing for direct editing	R			
Provides tools within the application to validate and identify errors within HTML scripts	R			
Provides formatting to accommodate mobile hardware	R	<i>iPhone, Smartphone, small-screen cell phones</i>		
Support for ADA compliance standards	R*	<i>Americans with Disabilities Act</i>		
Allows for various web design programming languages	D	<i>AJAX, JAVA, Pearl, php, etc.</i>		
Allows for co-branding based upon user role and affiliations	D			
Allows for co-branding with external sites	D			
While the main Branding "wrap" is locked, other individuals can update co-branding areas	D	<i>Portal pages for schools, departments, organizations affiliates with OHIO</i>		
Provides an authorization system that requires manager approval of branding changes made by another user, before it is published	D			

Additional Questions:

1. Provide a sample, showing the branding capabilities of the product.
2. Give an overview on how style templates and style sheets can be used for maximum branding flexibility.
3. Describe how the product applies and enforces style restrictions and constraints.
4. Explain any branding restrictions of the product.
5. Provide examples in how the product maintains ADA compliance.

6.4.2. Content Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Content Features				
Provides Instant messaging capability	D			
Provides voice chat capability	D	<i>i.e. help desk</i>		
Integrates with VOIP applications	D	<i>i.e. Skype</i>		
Provides scrolling news/information tickers	R	<i>Promotes University news, events, alerts, etc</i>		
Provide delivered pagelets with functional tools and third party integration such as calculators, notepads, stickies, Weather Bug, Google maps, news feeds, etc	R			
Provide the ability to print portal content in "printer friendly" format	R*			
Allows for customizable content without user having to log in, i.e., with user as a guest	D	<i>i.e. OHIO has this feature now for prospective students to indicate major and activity interests through drop downs to create a customized portal focusing on those interests</i>		
Allows interfacing with content from other portal applications	R	<i>i.e. 3rd party Alumni portal</i>		
Supports creation of content that can also be rendered on mobile hardware	R	<i>i.e. iPhones, Smartphone, small-screen cell phones</i>		
Provides mobile features that identifies specific mobile hardware logging and is automatically formatted to meet the display requirements of that hardware.	D			
Provides ability to deliver BI content, such as KPIs in a secure, graphical environment	D			
Provide a bookmarking feature for internal and external content	R			
Allow guests to RSVP to invitations to events regardless whether he/she is a registered user	D			

Provide gateway for secure, financial transactions	R			
Provide ecommerce functions for bookstore or alumni products	D			
Easily allows for third-party integration of point-of-purchase providers	R*			
Provide security for "limited access" portals	R	<i>i.e. At OHIO, students can grant access to parents to view and pay bill through CASHNet. A parent portal provides access where students can grant parents access to pay their bills, look at grades, etc</i>		
Provides event creation/scheduling, tied into calendaring feature	D	<i>Enables user to create or select events and manage attendee list</i>		
Provide "To Do" functions that allow user to manage personal as To Do lists	R	<i>Personal To Do items</i>		
Provide a comprehensive "To Do" list that draws task items from several sources and combines them into one list	R	<i>Administrative To Do items</i>		
Includes tools to allow portal content to push content through external APIs such as Facebook or MySpace	D			
Provide customizable calendar that allows content from other external calendars (i.e. University, Oracle, Outlook, Google) to be pushed into one comprehensive user calendar with features to filter content by user	R*			
Allow students to create their own portal page and content for student groups and organizations	D			
Provide tools and features for creating and promoting polls and surveys	D			
Editing Tools				

Provides editing tools to easily allow creation of content in the form of pages, tabbed sections, pagelets and other sites	R*			
Provides an easy to use preview tool to review content in WYSIWYG format, before publishing	D			
Includes tools to publish content as magazine/newsletter formats	D	<i>i.e. student newspaper, departmental newsletters, etc</i>		
Provides project management tracking for content development	D			
Includes the ability for content developers to record notes and version update comments that are directly related to the content	R			
Provide role-based security that defines who has access to edit/manage content	R*			
Provide role-based security that defines how a user has access to edit/manage content	R*	<i>i.e. view only, update only, creation only, etc.</i>		
Provides easy to use editing tools for users with minimal skill set to add or update content	R	<i>i.e. to add/update portal content</i>		
Provides built in spell checker	R*			
Supports the copying/moving of content from one portal site to another	R			
Provides tools to optimize/reformat uploaded content such as pictures/videos for optimal performance	R			
Allows assigned user to create content/pagelets made up of internal and external hyperlinks	R*			
Provide the ability to publish content for future dates	R			
Provides workflow features that require manager approval of content created by another user before it is published. Workflow should also include notification features.	R			
Provides automated notification workflow to manage approval system	R			

Provide feature that allows customizable “ads” or badges that visually promotes critical transactions, notices or events	R	<i>i.e. “Give to Current Campaign” “Promote sporting or theater event” and other alerts or announcements</i>		
Supports various interface/API standards to external content	R	<i>i.e. WeatherBug, Facebook/MySpace streaming, RSS feeds</i>		
Easily stores and organizes uploaded content	R*	<i>Pictures, videos, documents, etc.</i>		
Provides tools for building database queries into content	R			
Provides delivered, single sign-on integration to Oracle/PeopleSoft Campus Solutions	R			
Provides delivered, single sign-on integration to Oracle HR and Finance	R*			
Provides delivered, single sign-on integration to Adirondack housing system	R*			
Provides delivered, single sign-on integration to Blackboard	R*			
Provides delivered, single sign-on integration to DARS (degree audit reporting system)	R*			
Provides delivered integration to CommonSpot (Web content management system)	R*			
Provides delivered, single sign-on integration to CRM system (TBD August 2009)	R*			
Provides tools to enable single-sign on with other applications	R*	<i>(e.g. Symplicity, Pyramed, Titanium)</i>		
Alerts/Notifications				
Provide an emergency alert notification system through the portal	R*			
Provides tools to push information/announcements/alerts to users via delivery medium of their (users’) choice	D	<i>i.e., email, text message</i>		
Allows content from other systems to be pushed to the portal, based on user roles, providing highly visual alerts and notifications	R*	<i>i.e. alerts from an emergency notification system pushed to the portal</i>		

Sends notices to administrators/authors when content has expired	D			
Allow alerts to be created that notify users of updates or additions to content	D	<i>i.e. content has been revised on a pagelet or article.</i>		
Provides visual/audio alerts to notify of upcoming To Do/Calendar events	D			

Additional Questions:

1. Describe how content is created using the application.
2. Describe the process for submitting and approving content in the application.
3. Explain the workflow process the application provides. Include how developers and managers are notified throughout the workflow process.
4. Demonstrate how the application builds internal and external RSS feeds are into content.
5. Provide a demonstration for the best way to alert a user to each of the following:
 - a. Campus emergencies
 - b. Individual student related alerts related to to-do items, holds, late payment notifications
 - c. Campus events and activities, including the ability to filter relevant content
 - d. Academic calendar events and deadlines
6. Give an overview of the project management tools the application provides.
7. Describe the process that occurs when content is revised.
8. Describe how content is secured and linked to users and roles using the application.
9. Describe how your product integrates with other editing tools for creating content. Explain how content can be imported from HTML editor.
10. Give an overview of the latest scripting technologies (i.e. AJAX, Pearl, PHP) the application uses in delivering content.
11. Explain how the application integrates with other 3rd party content using APIs (i.e. Facebook, Google, Yahoo, etc).
12. Give a demonstration showing how database queries can be displayed as content.
13. Explain the type of skills a user will need in order to create content, using the application.
14. Describe how the application validates and reports on issues/errors related to content.
15. Explain how developers and managers are notified of content that has been expired or has not been updated within a certain period of time.
16. Describe how standards are applied to uploaded objects (i.e. images, video, and documents), and how it is automatically formatted to meet those standards.
17. Give an overview on how uploaded content is managed and stored in the application's directory system.

6.4.2a. Content Search Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Supports tagging and linking metadata tags to for content searches	R*			
Allows for the creation of indexes to optimize content search	R			
Prevents searching on secure data that user is not authorized to access	R			
Capable of using Google search engine for portal searches	R			
Provides ability to create pagelets to execute searches within other systems	D	<i>i.e. University Library, campus staff/student/faculty directory</i>		

Additional Questions:

1. Demonstrate how the application performs content and navigation searches. Include examples of your advanced search capabilities.
2. Explain how archived content can be included in searches.
3. Show how 3rd party search engines can be integrated into the application.
4. Describe how your system tracks and indexes content and content metadata. Provide examples on how content is classified and indexed for optimal search:
 - a. Text
 - b. Images and other objects
 - c. Keywords
 - d. Tags and metadata
5. Explain how the application indexes images and other objects that are uploaded. Provide an overview on how metadata is linked to these objects.
6. Give a description in how content navigation is indexed and optimized for best optimal search. Show an example of how this would appear in search results.

6.4.2b. Content Monitoring and Reporting Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Allows querying of portal database through delivered query tools or via third- party reporting tools	R			
Provide tools to monitor links, indentifying dead links with notifications/alerts	R			
Provide reporting tools to track content as it is developed and throughout the content lifecycle	R			
Provides tools that monitor user access, tracking statistics on user navigation, and content accessed	R*	<i>Currently use Google analytics</i>		
Provides tools to monitor searches performed while logged into the portal	R			

Additional Questions:

1. Provide an overview of the tools the application has for querying the application database.
2. Give examples of the integrated monitoring tools the application uses to track content and user usage.
3. Explain how the application integrates with other major analysis tools.

6.4.3. Navigation Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Provides features that allow for the automatic creation of navigation or menus based on content creation options	D			
Provides the ability to automatically repair menu links when content is deleted/moved	D			
Includes tools that validate menu structure and links	R			
Allows user to personalize content by selecting content to appear that is relevant to that person	R*			
Allows user to personalize content by moving content/pagelets around on page	R*			
Allows administrators to lock down content, preventing user from removing or moving it	R*	<i>i.e. emergency alert pagelet</i>		
Allows groups/departments to create their own portal sites, independent of the "main" portal site, yet with all the controls and security	D	<i>This would be sub-portal (not an additional tab), which might allow a department to set up its own portal and content, with the overall control of branding, content, security residing with main portal administrators</i>		

Additional Questions:

1. Give an overview on how the menus and navigation can be generated as content is created. Include how that content can be managed and manipulated by developers.
2. Provide an example, showing how the application updates navigation when content is moved or the hierarchy is changed. Include a demonstration of the tools that provide the checks and balances.

6.4.4. Technology Requirements

6.4.4a. Authentication and Authorization Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Integrates with AD for authentication	R*			
Uses LDAP for roles?	R*			
Integrates with new identity management system (TBD October 2009)	R*			
Enables users to change their own passwords securely	R			
Allows passwords to be entered in a non-display field	R*			
Allows passwords to be encrypted during network transit	R*			
Does not store passwords in application	R*			
All attempted and successful logins are logged	R*	<i>Log should include date, time, user ID, network address</i>		
Accounts can be locked after an Ohio University-defined number of unsuccessful login attempts	R*			
Logs users off after an Ohio University-defined period of inactivity	R*			
Provides different levels of user access	R*	<i>Ability to restrict access to particular application functions based on role assignment.</i>		

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Provides role-based authorization (rather than user ID based or managed by ACLs)	R			
Allows roles to be tailored to Ohio University needs	R*	<i>Customize roles to match our business processes</i>		
Provides security reports of users and access levels, so access can be reviewed periodically for appropriateness	R*	<i>Reports that are easy to read by supervisors, not IT staff</i>		

Additional Questions

1. Identify and describe all roles that can be assigned to users within the portal, as well as the system's mechanism for managing those roles. Describe the level and flexibility to which roles can be used to restrict access to various data.
2. Describe how you will protect user sessions. (Encryption, Session Timeouts, Forced Logouts, Session Hijacking, Spoofing, etc.)

6.4.4b Data Security Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
All network transfer of restricted and/or sensitive data is encrypted, when traversing a public network, or any wireless network including the Ohio University wireless networks (consider data transmissions between end user devices and application and database servers as well)	R*			
Restricted or sensitive data is stored by design, temporarily or otherwise, on end user workstations	R*			

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Restricted data that is stored on end user devices or removable media is encrypted	R*			
If vendor requires remote access to restricted or sensitive data to deliver contractual services (i.e. support), access is attended by Ohio University or otherwise controlled	R*	<i>When access is needed, access is temporarily enabled by Ohio University staff. When not needed, access can be disabled.</i>		
Activity of technical staff, including the Vendor/Developer, is logged when performing system maintenance	R*			
Provides simple ways to generate meaningful and actionable reports from access audit logs	R*	<i>Established audit reports (anomalies) readable by non IT staff.</i>		
Access to audit log reporting can be restricted by role	R*	<i>Compliance, Privacy or Security officer can run audit reports as needed without IT staff intervention. IT staff access can be restricted from user activity audit logs.</i>		
Vendor/developer has and exercises a process to monitor for and test its software when security patches for the operating system are released	R*			
Supports HIPAA Compliance	R*			
Supports FERPA Compliance	R*			
Supports PCI Compliance	R*			

6.4.4c System and Infrastructure Requirements

Requirements	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
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Uses Oracle Portal or UPortal	R			
Is compatible with existing operating system (either Red Hat Linux or Windows OS)	R*			
Is compatible with existing database platform (either Oracle or MS SQLServer)	R*			
Can tune the various components within the architecture	R			
Supports major standard email applications integration	R*	MS Exchange (administrative email system) and MS Live (student email system)		
Integrates University email system into alerts and messages as a result of actions occurring within the portal, with opt in/out options	R*	.		
Supports most internet browsers	R*	Internet Explorer, Fire Fox, Google Chrome		
Supports screen resolution variations	R*			
Integrates content from current CMS system	R*	i.e. Paperthin's CommonSpot CMS application		
Provides the ability to access the system from a mobile device	R	iPhone, Palm, Blackberry		
Adheres to portlet standard JSR 286	R			

Additional Questions

1. Describe the architecture of your solution. (N-tier, Load balancer, etc.) Describe the role of each system component within that architecture. Identify components which are "added on" (e.g., Reporting tools), which components are optional, which components come from a third party, and which components must be provided by Ohio University.
2. Describe all technical standards and/or specifications to which the system complies. (W3C or Supported Browsers, IEEE, DOD, etc.) The description should address standards and/or specifications for security, communications, user-interfaces, and so forth. Note any external certifications of conformance to those standards.
3. Describe all existing interfaces to externally supplied systems. Include interfaces to authentication and authorization services, exposed web services, centralized logging

facilities, and service monitoring facilities. (Active Directory, LDAP, SAML, federated authentication, identity management, SOA, SNMP, Message Brokers, Service Buses, etc.)

6.4.4d Scalability Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Affords the ability for future growth in the number of users accessing the system	R*			
Affords the ability for future growth in the number of roles accessing the system	R*			
Provide a backup and system recovery capability to minimize down time	R*			
Configurations should allow 24/7 accessibility	R*			
Offers load-balancing, clustering, and failover capabilities	R*		Integrate with existing Load-balancing hardware	

6.4.5 Services and Support Requirements

Requirement	Importance	Ohio Univ. Notes	Yes/No	Vendor Notes
Provides procedures for error reporting and resolutions	R*			
Provides procedures for contacting the vendor helpdesk	R*			
Provides access to a knowledge based site to search for fixes and solutions	R*			
Provides procedures for escalating incidents	R*			
Provides 24/7 support	R*			
Outlines an implementation approach that maximizes mentoring, coaching, and knowledge transfer	R*			
Provides a schedule for patches and fixes	R*			
Offers development tools for implementation	R*			

Provides an automated implementation tool and full release or version-automated upgrade tool	R			
Provides schedule for proposed upgrades and updates	R*			
Provides technical and user training	R*			
Provides documentation supporting and outlining the configuration	R*			
Provides network specifications outlying system requirements and dependencies	R*			
Provides a dedicated technical resource for initial implementation	R*			

Additional Questions:

1. Provide an overview of the included standard support offering for the product. Explain any additional related costs.
2. Provide information on extended support and related costs.
3. Explain your company's system support policy. Include an overview of issues escalation and prioritization.
4. Provide an overview of your training program. Include current training offerings and the type of training material that is included.
5. Give an overview of the various skill sets and roles required to support the application.
6. Provide an overview of the professional services available to implement and support continued ongoing development of the solution. Explain how these services are factored into the licensing and maintenance cost of the application.

6.4.6 General Questions

1. See Section 3.4 for ideal timeline, and describe the timeline for a typical implementation of the solution. Timeline considerations will be part of the evaluation, but the bidder will not be rejected due to inability to meet the ideal timeline described. Please provide a realistic view of the time needed.
2. Can customizations be requested? How does such a request affect timelines and future support and upgrades?
3. What can be expected in terms of upgrades and product expansion for the near and distant future?
4. Please provide separate sheets with comprehensive pricing. Include:
 - a. Cost estimate for implementation services (Show breakdown of cost/hr, and estimate of hours needed, for any consulting recommended. Include estimate for any actual-cost charges such as hotel or document fees, etc.)
 - b. Costs for building initial portal pages – at least two will be needed (Student and Faculty). Include any costs associated with outside or internally developed software that you intend to use.

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- c. Cost model for training and documentation with description of what will be provided for costs outlined.
 - d. Costs for maintenance – i.e., ongoing support.
 - e. Description of, and pricing associated with, any other charges or fees which might be expected.
5. Describe your project implementation plans – typical tasks with timeline, milestones and phases as appropriate.
 6. How many years have you been in business?
 7. How many persons do you employ?
 8. How many locations do you have? How many locations in Ohio?
 9. How many years have you provided the type of product and service proposed?
 10. Describe your customer support – both technical and functional.
 11. List any partners or subcontractors you expect to participate in providing the product or service proposed, and describe the role they would play.
 12. Provide the name(s) of persons who may be assigned to the University for implementation:

Name	Title	# of yrs with your firm

Please provide brief biographies or resumes for the persons listed above.

22. Provide the name of person(s) who may be assigned to the University for ongoing support:

Name	Title	# of yrs with your firm

Please provide brief biographies or resumes for the persons listed above.