

Request for Proposal

JOLIET JUNIOR COLLEGE
Institution-wide
VoIP TELEPHONY MIGRATION
1215 HOUBOLT ROAD
JOLIET, ILLINOIS 60431
June 11, 2009

Table of Contents

I.	General Info	1
II.	Vendor Qualifications	7
III.	Technical Requirements	8
	A. Communications System.....	8
	B. Messaging Requirements	20
	C. Call Center Requirements	30
IV.	Implementation and Training	56
V.	Warranty, Maintenance and Support	57
VI.	Terms and Conditions.....	59
VII.	Pricing and Financing Options	64

I. General Info

Executive Summary

The proposing vendor must include an Executive Summary highlighting the vendor's offer and outlining the benefits to Joliet Junior College.

Background

Joliet Junior College is a comprehensive community college. The college offers pre-baccalaureate programs for students planning to transfer to a four-year university, occupational education leading directly to employment, adult education and literacy programs, work force and workplace development services, and support services to help students succeed. The College has a combined total of 14,000 credit and 17,000 non-credit students attending classes on its main campus, located within the city of Joliet, and its four extension campuses located in Romeoville, Morris, southeast and downtown Joliet.

Vision

Joliet Junior College, the nation's first public community college, will be a leader in teaching and learning, and the first choice for post-secondary education.

Mission

Joliet Junior College enriches people's lives through affordable, accessible, and quality programs and services. The college provides transfer and career preparation, training and workforce development, and a lifetime of learning to the diverse community it serves.

Strategic Goals

Improve student success with an emphasis on enrollment, retention, graduation, and transfer rates and effective teaching strategies and learning outcomes.

Increase institutional sustainability with an emphasis on obtaining necessary resources, state-of-the-art facilities, professional development, and environmental stewardship.

Increase and improve partnerships with organizations that support the college's mission.

Utilize technology strategically to advance teaching and learning, expand online and alternative delivery methods, and enable effective administrative and support services.

Improve the success of minority, underrepresented and underprepared student populations in addition to closing the gap between high school and college performance.

Develop programs that anticipate and respond to labor market demand.

Current Environment

Cisco core switch, Cisco POE switches throughout all campuses (Cisco 3560, Cisco 3750e), single mode fiber backbone, all network cabling is Cat5e, Fujitsu 9600 w/ Centigram voicemail. Data connections between campuses: 5 Mbps from Main Campus to Weitendorf, 20 Mbps from Main Campus to City Center, 20 Mbps from Main Campus to Morris, 50 Mbps from Main Campus to North Campus (Romeoville). Main Campus has 700 telephones, City Center has 120 telephones, Grundy County has 8 telephones, Weitendorf has 8 telephones and North Campus has 35 telephones. Amcom is used for E911 services. There are 39 internal and 22 external emergency phones on Main Campus, one internal emergency phone at City Center and one internal emergency phone at North Campus. Weitendorf Center has 6 ring-down internal emergency phones on one party line. There are no emergency telephones at Grundy County. CodeBlue and Ceeco are the providers of the emergency phones.

Objectives/Scope of Work

This project has been initiated to address the need to replace four end of life Fujitsu 9600 PBX's. We seek to provide unified communications, detailed reporting and find me follow me features to our end users in the College community. It is important that departments, who all differ in work flow and business processes, are able to shape the development of the system and drive its design through their business needs.

Liability and Reserved Rights

This RFP does not commit Joliet Junior College to pay any cost incurred in the preparation or submission of any proposal or to procure or contract for any services. Joliet Junior College (JJC) reserves the right to accept or reject any or all proposals. It is the College's intent to award this contract to the vendor who provides the best overall value to the college. Joliet Junior College is not obligated to award this contract to lowest bidder.

Junior College reserves the right to amend this RFP by an addendum issued up to five business days prior to the date set for receipt of proposals. Addenda or amendments will

be EMAILED to all vendors who have procured copies of the RFP. If revisions are of such a magnitude to warrant, in Joliet Junior College's opinion, the postponement of the date for receipt of proposals an addendum will be issued announcing the new date.

Instructions to Bidders

This section outlines specific instructions for proposal submission. Vendors not adhering to these instructions may be subject to disqualification without further consideration.

General Procedures

Issuing Authority

This RFP is issued by: JUDY MITCHELL, DIRECTOR BUSINESS & AUXILIARY SERVICES

Contact name	<i>Judy Mitchell</i>
Issuing office name	<i>Business & Auxiliary Services</i>
Street address	<i>1215 Houbolt Road</i>
City, state and zip code	<i>Joliet, IL 60431</i>
Telephone number	<i>815-280-6640</i>
Fax number	<i>815-280-6631</i>
Email address	<i>jmitchel@jjc.edu</i>

Price Guarantee

Vendors are asked to guarantee their prices for a period not to exceed 60 days from the date of submission of the response to this RFP.

Pre-Proposal Conference

Pre-Proposal Questions

In order to have questions addressed vendors must submit them VIA EMAIL to:

Name of responsible person or office	<i>Judy Mitchell, Director Business & Auxiliary Sv</i>
Email address	<i>jmitchel@jjc.edu</i>

All questions must be received by Joliet Junior College by June 18, 2009, 10:00 am to allow for answer preparation.

Clarification and Interpretation of RFP

The words must or will in this Request for Proposal (RFP) indicate mandatory requirements. Taking exception to any mandatory requirement may be grounds for

rejection of the proposal. There are other requirements Joliet Junior College considers critical but not mandatory. Therefore, it is important to respond in a brief but concise manner to each section of this document.

Indicate the level of compliance with:

- **“Acknowledge.” – The Vendor has read and understood the information provided; however, no action is required of the Vendor.**
- **“Comply.” – Vendor meets the specifications.**
- **“Partially comply.” – Vendor meets part of the specification; always explain how, or the deviation.**
- **“Comply with clarification.” – Vendor meets the specification; however, the manner in which it is accomplished may be different from that specified by Joliet Junior College. Always provide clarifying information.**
- **“Exception.” – Vendor does not meet the specification. Please provide an alternative when possible.**

Preparation of Proposals

Proposal Format

All proposals must be on 8½” x 11” paper in three-ring binders. One (1) ORIGINAL and seven (7) COPIES must be submitted to the address below identified in Proposal Delivery:

The complete proposal must include the proposal document with a point-by-point response to the RFP and all other materials requested in the RFP. Vendors may include any additional materials they feel could assist in the evaluation of the proposed system. However, each question must be responded to completely. References to other documents will not be accepted.

Vendors are cautioned that proposals which do not follow the format required by this RFP will be subject to rejection without review.

Proposal Due Date

All proposals will be received by 2:00 pm on July 15, 2009 and will be labeled: Response to VoIP Telephony Migration Request for Proposal for Joliet Junior College.

Proposal Delivery

Complete proposals will be submitted to:

Mail Address

Name JUDY MITCHELL
Title DIRECTOR, BUSINESS & AUXILIARY SERVICES
Joliet Junior College Joliet Junior College
Address 1215 HOUBOLT ROAD, H1018
City JOLIET
State, Zip Code IL, 60431
Telephone Number 815-280-6640

Proposal Inclusions

All equipment, accessories, database information, training, software, hardware, labor, and materials must be furnished for the installation of the telecommunications system specified. Any additional material or equipment necessary for installation and operation of the system not specified or described herein, will be deemed to be part of these specifications.

Standard Agreements

The vendor must provide a copy of their standard product agreements which Joliet Junior College will be asked to sign should the bid be awarded to the vendor.

Guarantee of Compatibility

The vendor is responsible for guaranteeing their proposed solution will work with the existing JJC network infrastructure.

Identify any network infrastructure dependencies that if changed (upgraded or selecting a different vendor's equivalent network hardware) could potentially cause issues with any part of the VoIP system.

Proposal Modification and Withdrawal

Once submitted, a proposal may be modified or withdrawn only by appropriate notice to Joliet Junior College. Such notice will be in writing over the signature of the vendor. A withdrawn proposal may be resubmitted up to the time designated for the receipt of proposals provided it then fully conforms with the general terms and conditions.

Confidentiality

Proposals submitted to Joliet Junior College for consideration will be held in confidence and not made available to other vendors for review or comparison. Proposals submitted and terms and conditions specified in each vendor's bid response will remain the property of Joliet Junior College.

All information in this RFP is confidential and will not be disclosed except to those responding to this RFP. The vendor may designate the portions of the proposal that are proprietary in nature, and Joliet Junior College agrees not to disclose those portions except for purpose of evaluating the proposal.

Calendar of Events

The following reflects the project schedule:

Activity	Date	Time
<i>RFP released to vendors</i>	<i>June 12, 2009</i>	
<i>Pre-Proposal Conference questions deadline</i>	<i>June 18, 2009</i>	<i>10:00 am</i>
<i>Pre-Proposal Conference</i>	<i>June 22, 2009</i>	<i>1:00 pm</i>
<i>Site survey</i>	<i>June 22, 2009</i>	<i>2:30 pm</i>
<i>Addendum from Pre-Proposal Conference released</i>	<i>June 23, 2009</i>	
<i>Final questions deadline</i>	<i>June 26, 2009</i>	<i>10:00 am</i>
<i>Addendum from final questions released</i>	<i>July 2, 2009</i>	
<i>Proposal delivery and opening</i>	<i>July 15, 2009</i>	<i>2:00 pm</i>
<i>Evaluation</i>	<i>July 16-21, 2009</i>	
<i>Demonstration of proposed solution (if necessary)</i>	<i>July 24, 27 & 28, 2009</i>	
<i>Contract negotiations completed</i>	<i>August 3, 2009</i>	
<i>Notification of selection</i>	<i>August 12, 2009</i>	
<i>Final contract signed</i>	<i>August 12, 2009</i>	

II. Vendor Qualifications

Company History

The vendor must provide a brief description of its company.

The vendor must provide a description of its experience in providing VoIP communications systems migrations in higher education environments.

The vendor must provide evidence of financial stability with either an annual report, 10K, or audited financial statement.

Who is the manufacturer of the proposed system?

The vendor must have a technical support center that provides remote maintenance.

What other types of customer support is available from the technical support center?

The vendor must have provisions to provide emergency service.

The vendor must submit at least three higher education reference customers with systems similar in size and architecture to the one proposed to Joliet Junior College. Reference information must include company name, contact, telephone number, and the system name with model number.

Please describe the project management and implementation services you will provide for the proposed solution. Service description must be of the services included in the price quoted for the proposed solution.

III. Technical Requirements

A. Communications System

This section specifies those requirements the proposed communications system must provide.

System Architecture

The proposed communications system must be a digital switching system capable of integrated voice and data communications. It must have stored program control, self-diagnostic routines, modular design, and optional duplication of critical subsystems. It must be registered for compliance with FCC Part 68 Rules for Registration and must be in compliance with Part 15, Subpart J of the FCC rules relating to electromagnetic interference (EMI).

Briefly describe your IP Solution.

Describe in detail your IP Solution and system architecture below.

Complete the Table of Characteristics that summarizes the proposed system.

Capability	Brief Description
Call Processing Software	
Number of Features Supported	
Processor	
Operating System	
Memory Size (min-max)	
Storage Mediums	
Translations Back-Up/Media	
Duplication options available	
Reliability Rating (5-9's)	
Busy Hour Call Completions	
Number of End-Point Connections	
Gateways	
Remote Survivability Options	

What is the operating platform for your VoIP solution?

The Gateway must be “Universal” slot oriented and support any type of port circuit pack.

Provide a list of the Media Modules or port circuit packs your system supports and the number of ports supported by each circuit pack or modules.

Media Modules/Circuit Pack	Number of Ports
Stations	
Analog	
Analog Caller ID	
Proprietary Digital	
Voice Only	
Data Only	
Voice/Data	
ISDN-BRI	
Voice Only	
Data Only	
Voice/Data	
Combination Analog Trunk and Line	
Central Office (CO), Direct Inward Dial (DID), CAMA E911 or Analog	
Trunks	
Central Office (CO)	
Direct Inward Dial (DID)	
Tie Trunks	
DS1	
E1	
ISDN-BRI	
ISDN-PRI	
ATM	

How does your system handle QoS?

Does the system provide industry standard application programming interfaces (API's) such as, TAPI, TSAPI, and JTAPI?

Describe how the components that provide PSTN accesses are integrated with the other system components including the IP Telephone Sets.

Can the system support the use of multiple CODECs simultaneously. For example, a call originating and terminating within the same LAN segment uses G.711 while another call that traverses the WAN uses G.729.a?

Does your IP solution support other networking services such as TFTP, DHCP, DNS, etc.?

The proposed IP solution must have a power back up system. Please describe your options.

System and Traffic Capacities

State the maximum number of ports (trunks and stations) that the system will support without requiring main processor upgrade or change out.

Describe what is required (hardware and software) with the proposed system to expand to meet a 25% growth off the stated equipped and wired for requirements.

How many talk paths and simultaneous conversations will the proposed system support? Please stated as proposed and system maximum.

State the Busy Hour Call Completion capacity of the proposed system.

Describe the tools and technologies available to assist in migrating to the new system. For example, can Joliet Junior College provide an electronic file containing extension numbers and user names to populate the new system?

System Redundancy and Reliability

The system should provide a minimum availability of 99.9%, with the capability of increasing the availability to 99.99% and 99.999% as an option.

Describe the reliability, redundancy or duplication options offered by your system.

Standards

List the standards bodies the manufacturer/company actively participates in.

List the various standards supported by your IP solution

Environmental Requirements

Please describe the environmental requirements for your solution. Be sure to include:

- *Room preparation*
- *Temperature and humidity ranges (both long term and short term)*
- *Power requirements*
- *Grounding requirements*
- *Heat dissipation of the proposed system in BTUs per hour.*

System Features – Voice

Does the IP Voice Solution offer features that are equivalent to those offered on a class leading enterprise TDM PBX? State the number of features provided on the base system.

Speed Dialing/Abbreviated Dialing

Can your system provide speed/abbreviated dial personal, group and system lists for quick access to frequently used numbers?

Automatic Callback

The system must be able to support Automatic Callback through an analog station without the user having to enter a code or flashing the hook.

Automatic Callback Message

Must be able to leave an automatic call back message by the press of a button without having to wait for a voice mail announcement or attendant.

Announcements

System must be able to provide announcements over a LAN.

Call Forwarding/Call Coverage

The system must include a calling coverage type feature that allows calls to be redirected to a coverage path consisting of up to six answering positions accessed in sequence if coverage criteria are met. Describe.

Call Coverage feature must be assignable by time of day and day of week. Describe.

Redirection criteria must include the following:

- Active/Busy

- No Answer
- All Calls
- Time of Day
- Day of Week

and must be programmable by the System Administrator. The no answer period before redirecting the call from the called party to the first coverage point must be able to be different from the no answer period between coverage points. How many rings can both of the no answer periods be?

Redirection criteria must be assignable separately for internal and external calls.

The system must support overriding criteria which are checked before the redirection criteria, and the call redirected accordingly. The following capabilities must exist:

An internal caller must be able to send the call directly to coverage without ringing the called party's phone.

The called party must be able to temporarily direct incoming calls to coverage regardless of the assigned redirection criteria.

The called party must be able to forward his/her calls to another extension and have calls complete to this extension before redirecting to coverage.

Explain how each of these overriding features works.

The system must provide the following options to the covering user:

For display-equipped sets, the incoming call must be identified to the covering user as a call coverage call, and the principal must be identified on the display.

The covering user must be able to call the covered principal for a consultation, then conference or transfer the calling party.

The covering user must be able to leave a message for the principal to call an internal caller back simply by pressing a designated button.

Explain how each of these covering user options work.

The Call Coverage feature must allow any of the coverage answering positions in the coverage path to be on a different system. Describe.

Is the Call Coverage feature to an off-network coverage answering position monitored? Describe.

Call Forwarding: What Call Forwarding options does your system support?

Caller ID

What information will be displayed at the set?

What information will be displayed at the set if the user is on a call and a second line rings?

What information will the PBX send (e.g., company name, or name of station user)?

Can individual users block this feature on a per call basis? How?

Call Pickup

What Call Pick Up options does your system support?

Conferencing

How may parties can be conferenced together?

Must be able to toggle or switch between multiple conference parties and maintain ability to drop, transfer, access or leave a conference call.

Must be able to scroll though the display to see who is on the conference call and selectively drop desired parties.

Must be able to establish meet conference arrangements whereby conferees can dial a pre-determined number, input an access code and join the conference call.

Must be able to provide users on an as needed basis the ability to conference on other parties without placing original call on temporary or hard hold.

No Hold Conference

Must have ability to conference another party on an existing call without going on hold or temporarily disconnecting from the existing call or conference call.

Hunting

Briefly describe the system's hunting features and capabilities.

Integrated Directory

A Directory function that allows internal system users with display equipped sets to access the system database, use the touch-tone pad to key in a name, and retrieve an extension number. Describe how this feature works.

Intercom

Does your system support automatic intercom whereby a dedicated intercom group can be established specifically for a group that often calls each other.

Can intercom calls within a specific group be automatically answered?

Does your system support a separate dial intercom whereby a dedicated intercom group can dial a one or two digit code to reach frequently called members within that group.

Last Number Dialed

The proposed system must be able to easily re-dial the number used for the last call initiated, whether it was dialed from the dial pad or using an abbreviated dial button. How many dialed digits does your solution support?

Music on Hold

Briefly describe how your solution handles music on hold.

Night Service

Briefly describe the system's Night Service Arrangements.

Paging

The system must provide paging access for at least nine zones.

Does your system offer paging through the set?

Ringling Pattern

Does your system offer different Ringling Patterns for different calling situations?

Station Lock

Can a user lock a station to prevent unauthorized use when they are not present?

Telecommuting

Does you solution offer a remote worker arrangement?

Does the server maintain control of the call until it is answered or receives a busy and is returned to the server for possible further routing?

Can the user change primary and secondary coverage paths locally? Describe.

Telecommute: Can the user change primary and secondary coverage paths remotely? Describe.

System Features – Networking

Explain how the proposed systems' Voice over IP application will interface with existing PSTN Local and Long Distance networks.

The system must support the ITU-T-defined Integrated Services Digital Network (ISDN) Primary Rate Interface (PRI) and the European Telecommunications Standards Institute (ETSI) ISDN-PRI.

The ISDN-PRI interface must support the following features:

- **Call-by-Call Service Selection**
- **Channel Negotiation**
- **Calling Party Number (CPN)**
- **Billing Number (BN)**
- **Non-Facility Associated Signaling (NFAS)**
- **D-Channel Backup**
- **Administration Connections with Automatic Restoration Temporary Signaling Connections**

Describe how the proposed system provides each of these features.

Private Networks

It must be possible to connect multiple remote sites in a private network.

Describe the support the system provides for QSIG.

Describe how remote site functions and feature transparency are supported.

Call Routing

The system must provide software to route long distance calls over the appropriate, usually least costly, trunk group via public or private networks. Describe how this is accomplished.

The system must be able to screen up to 28 digits in order to determine how the call is routed.

The system should route a call to a Routing Pattern consisting of trunk groups accessed in a predetermined order. How many Routing Patterns are supported by the system, and what is the maximum number of trunk groups that can be accessed from a routing pattern?

The system must support Time-of-Day (TOD) routing, which allows the routing patterns accessed to be changed based on the time of day. How many TOD tables are supported?

The system must be able to automatically change the routing plan based on the time of day. How many times can this occur per day?

The system administrator must have the capability to establish an override schedule to take advantage of special situations such as low holiday toll rates. Describe.

Certain routes for call completion must be permitted only when the station user enters a valid Authorization Code. Describe.

How many Classes of Service (COS) and Classes of Restriction (COR) are supported by the system?

System Features – Management

Describe, in detail, the system management features provided by the proposed system.

Can your System Management solution support multiple switches?

Can the proposed System Management solution be used to manage all proposed applications.; switch, remote switches, Call Center; Voice Messaging platform?

What is the maximum number of administration terminals supported?

How many simultaneous system management connection does your proposed solution support?

Can the connections support multiple switches?

Provide in details the necessary hardware/software requirements for supporting the proposed System Management solution. Include local and remote requirements.

Indicate if the systems management solution can be accessed via remote modem dial-up, LAN/WAN, and/or Internet Web browser.

What is the maximum number of station users supported by the solution?

What is the maximum number of administration/maintenance terminals supported (total and active)?

Does the actual administration of the system use a simple, English language-based, full screen interface?

Can a new station user plug their telephone into an unused jack and dial an access code to identify themselves to the server as one of these stations without hardware, thereby completing the database entry and establishing their own service?

How can I verify if QoS for voice is working correctly on my network?

Reports

Can the system provide traffic and status reports, or is an external system required to compile and print such reports?

What Standard Reports are available with the system?

Can reports be generated on demand and on a customer-defined schedule?

Do you offer any WEB based System Management Tools?

Call Routing Security

To prevent unauthorized use of facilities after hours, the system must support Alternate Facilities Restriction Levels (AFRLs). Facilities Restriction Levels (FRLs) are used to determine a user's calling privileges when initiating public or private network calls. The AFRL feature, when activated, must automatically change the FRL to the appropriate AFRL. Describe how the system implements AFRLs.

How is the AFRL feature activated/deactivated?

Can the system restrict call transfers to an outgoing trunk?

As an option, the system must provide Authorization Codes. These codes, when dialed, will provide a user with additional call routing capabilities than would otherwise be available. Authorization Codes must be validated by the server and must be included in the CDR generated for the call. Describe.

Station Equipment and Features

IP Hardphones & Softphones

Describe the IP Hard phone options.

Describe the options for powering IP Telephone Sets.

Regarding IP telephones, can the device be used as an Ethernet hub/switch? If yes, how many ports are supported?

Can the same extension number appear multiple times on an IP Telephone Set?

Is the two-way speakerphone full or half duplex?

Can the same extension number appear on more than one IP Telephone Set?

Describe the relationship between MAC addresses and IP Telephone Sets and extension numbers.

Does the system support auto-registration of IP Telephone Sets?

Describe the options for connecting the IP Telephone Sets to the LAN. Can IP Telephone Sets share existing Ethernet ports with data devices or do they require separate Ethernet ports?

Do the IP Telephone Sets contain a hub or a switch? List the speeds at which it will operate.

Please describe your IP Softphone option.

Does IP Softphone Remote Worker Support for E911 Emergency Services?

What are the minimum requirements for supporting the IP Softphone?

Analog Stations

All analog sets provided by the vendor must be 2500-type compatible, and must include a flash button and a message-waiting lamp. Describe the analog sets being proposed.

Digital Stations

Will your system support Traditional PBX Digital sets? Please describe the sets you support.

All digital sets must provide one-button-access to the most commonly used features such as Hold, Transfer, Conference, and Disconnect.

Attendant Console and Features

The system shall provide an attendant console for servicing incoming calls to the system. The console should provide a jack to accommodate either a handset or headset. The console should feature a simple, uncluttered layout of call appearance keys, numeric keypad, attendant function keys, an easy-to-read display, system time indication, and major and minor alarm indication. Describe the attendant console available with the system.

The console should include the ability to determine the status of an extension number (busy/not busy) and to call an extension without having to key in the number.

The console display should provide information on the calling party (name, extension, and Class of Service/Class of Restriction); called party (name and extension); and call purpose (direct call, forwarded call, returned call, and so forth). Describe the information available on the console display.

Calls must be distributed to active attendant consoles on a most-idle-attendant basis. When all consoles are busy, calls must be queued to an attendant queue and served on a First-In-First-Out

(FIFO) basis. The console should provide an indication of the state of the attendant queue. Describe.

The attendant should have the ability to restrict calls to or from individual extensions or groups of extensions. In addition, it must be possible to activate or deactivate call forwarding all calls for individual extensions. Describe.

The attendant must be able to establish a five-party conference, and hold the conference on the console. The conference must be able to include both internal and external parties. Describe, including the numbers and types of parties that can be included.

Visually Handicapped Attendants Console – Suppliers should state what equipment and facilities are available.

The attendant must be able to use an automated directory of server extension numbers from the console. Describe.

Does the proposed solution support a PC base Console solution?

What other options and applications can be offered in conjunction with the PC based console solution?

B. Messaging Requirements

A multi-media messaging solution is required that meets today's needs and yet allows for future growth. Provide an overview of the system's universal messaging capabilities. Voice, fax and visual desktop access to messaging functionality and e-mail access must be included as standard features. What growth strategy is available?

Who is your preferred messaging vendor?

What other vendors are compatible with your system?

If you are proposing multiple messaging solutions, please answer the following questions for each vendor/solution.

Call Answering

Note: Caller refers to any non-user.

Automated Attendant

The voice messaging system is required to have Automated Attendant as part of its integrated platform. This feature must provide single digit menu choices to callers for automatic transfer, as well as provide the opportunity to reach assistance.

Multiple menu layers must be accessed by single digit selections. How many menu layers are supported?

The Automated Attendant must transfer callers who do not select a choice within a given timeframe to an answering position.

Automated Attendants menus can differ based on time of day and holiday schedules.

Users can access their mailboxes from an offsite location after reaching the Automated Attendant menu.

Caller Options

Each mailbox must be able to have a unique destination if the caller presses "0" to reach an attendant before or after leaving a message.

Call coverage must be able to be customized for each user. For example, some users may need to have their calls routed to live assistance first, others may need external calls to be routed differently than internal calls, and some may need after-hours call routing.

Callers must be able to transfer out of voice mail by specifying a user's name or extension either before or after leaving a message.

The system must provide a names directory for callers to access.

Callers must be given context-sensitive help prompts automatically and upon caller request.

Callers must be able to skip the greeting and immediately record a message.

The system must provide a warning when message recording is approaching the maximum length. What is the maximum message recording time?

Callers must be able to re-record a message.

Callers must be able to mark a message private.

Callers must be able to mark a message priority.

Callers must be able to attach a fax if fax messaging is configured.

If the called party's mailbox is full, the system must inform callers of other available options.

Multilingual Prompts

Multiple foreign language prompts are available for which the system can offer users and callers a choice of languages.

What foreign language prompts are available?

Call Processing

Broadcast Messages

The System Administrator and designated users must be able to broadcast system-wide messages without the use of a mailing list.

Login Announcement

An announcement can be created that will automatically play to users when they log on to their mailboxes.

Bulletin Board Mailboxes

Mailboxes can be designed to dispense information to callers.

User Mailbox Parameters

State the maximum messaging size of a user's mailbox.

The proposed system must alert users when their mailbox space gets low.

State the maximum message length.

Messages must be automatically deleted after a prescribed number of days. Different schedules must be available for new, old and unopened messages. In addition, the System Administrator must be able to initiate message deletion at any time. Describe in detail.

Users with desktop messaging privileges must be able to save a message indefinitely. Describe in detail.

Users can share a single telephone extension yet have a private mailbox. Callers can choose to be routed to a specific user when calling this extension.

Greetings

Users must be able to record multiple personal greetings. The system must recognize and play different personal greetings (if recorded) for internal vs. external, busy vs. no answer, and outside of business hours calls.

Users can choose to use a generic system greeting rather than a personalized greeting.

Creating Messages

The system must provide the following capabilities to users during message creation.

Re-record message from the beginning.

Re-record from any place within the message.

Pause during message creation.

Go forward and backward within the message in incremental steps.

Review before sending.

Users can press a single button or enter an access code to leave a prerecorded "return call" message in another user's mailbox.

Addressing Messages

The system must provide the following capabilities to users during addressing messages for delivery. In addition, the user must be able to cancel an incorrect address without affecting the message.

- **Address by extension**
- **Address by name**
- **Address to a list**
- **Address to a mixture of the above**

When addressing by extension number, the system voices back the name for confirmation.

Describe the dial-by-name feature.

Users can set up aliases for a short-cut way to address by name.

Users can address a message or dial an extension simply by speaking a person's name.

The user can verify receipt of a message at any time.

Mailing Lists

Mailing lists can be created and maintained by users that include both local and remote addresses. How many lists can each user have? How many entries in a list?

Mailing lists can be owned by one person but used by others without allowing access to the list owner's mailbox.

The System Administrator can create system lists that can be accessed by any user. How many lists can the system support? How many entries in a list?

A recipient can be removed prior to sending the message, even if the recipient was part of a pre-defined mailing list.

Message Delivery Markings

After addressing, the system must provide the following options.

The user can mark the message as private (cannot be forwarded).

The user can mark the message as priority, causing it to be queued before non-urgent messages in the recipient's mailbox.

The user can schedule the message for delivery up to one year in the future. A future delivery message can be changed or canceled any time before delivery.

The user can file a copy of the message within his/her mailbox.

The user can mark the same message with more than one of the above options for the same recipient.

Message Notification

How does the system notify users of new messages?

The system must make outcalls to offsite users at user-set telephone and pager numbers, based upon a user-set schedule and parameters such as notification of priority messages only. Describe.

The system provides instructions in the outcall message for the benefit of a non-user who answers the telephone. Outcall notification can be cancelled.

The System Administrator can limit the ability of users to request outcall message notification.

Message Retrieval

The system must give the number of new messages at login time, including specifying the number of priority and broadcast messages.

New messages are stored in a different category than saved messages and the categories can be presented in any order.

Messages can be played back first-in, first-out (FIFO) and last-in, first-out (LIFO).

The user can skip to the next message, choosing to have the message automatically saved or held in its current category.

The system can play one message after another without intervention.

What information is included in the message header?

Header information is automatically presented before each message and can be replayed at any time during message review.

The user can skip the message header and immediately hear the message.

The user can pause during message review.

The user can move backward and forward while listening to a message.

Speed controls (faster/slower) are available, without distortion of the message.

Volume controls (louder/softer) are available.

The message can be replayed.

A message can be deleted at any time before, during or after listening to it.

A message accidentally marked for deletion can be undeleted.

Message review can be canceled without affecting the remaining new messages.

The user can immediately reply by having the system call the message sender without entering any address information.

The user can record a reply to the message sender without re-addressing the message. The user is then returned back to getting messages at the point of exit.

The user can add a comment to the beginning or the end of a message not marked private and forward it to one or multiple recipients, including lists.

Forwarded messages not marked private can be re-forwarded with additional comments. All forwarded comments remain with the message.

Fax Messaging

Functionality

Fax messaging must be included as an integral part of the user's multi-media mailbox. Describe the fax feature in detail.

Header information must indicate a fax message and the number of pages.

Describe the printing options available for fax messages.

Visual Desktop User Interface to Voice, Fax and E-Mail Messages

User Options

An optional visual desktop user interface must be available that can be installed on the user's PC and/or that uses an Internet web-browser application. Please describe both.

Visual desktop user interface must support Windows and Macintosh desktop platforms.

Describe the on-screen options available to users.

Messages must be able to be audibly played on the PC.

The visual desktop user interface must provide a means to save a voice and fax message on the user's PC, providing unlimited storage time.

Message Addressing

The user must be able to use the visual desktop interface to address messages to multiple destinations.

The user must be able to use the visual desktop interface to create distribution mailing lists.

The visual desktop interface must have directory capabilities. Describe.

Fax Capabilities

Fax messages must be able to be viewed, manipulated and printed from the visual desktop user interface.

Fax cover sheet options are available from the visual desktop user interface.

The visual desktop user interface must allow users to turn any document into a fax, including those from another Windows or Macintosh application (for example, Microsoft Word) and send it.

Security

Describe the security measures that apply to the visual desktop user interface.

Architecture and Specifications

Describe the architecture and specifications required for the visual desktop user interface.

The visual desktop user interface application must use TCP/IP protocol to communicate between the users' PCs and the application.

The visual desktop user interface can be installed on a network file server for shared access.

Remote users not directly connected to the corporate LAN must still be able to access the visual desktop user interface.

The visual desktop user interface must support multiple message servers.

The visual desktop user interface must only require the use of server ports when the user is using the telephone or while a fax is being transmitted to a fax machine.

Security

User Mailbox Security

The following capabilities must be available.

Variable length user passwords must be supported with the ability for the System Administrator to set a minimum length. State the maximum length. What password restrictions can be imposed?

New users are required to change the System Administrator-assigned password to a personal password upon initial login to the system.

System must allow System Administrator to require users to periodically change their passwords.

The system prevents the System Administrator from obtaining personal passwords; however, if the password is forgotten, a new password can be issued.

The system disconnects after three incorrect attempts to log in.

The mailbox is locked after a fixed number of incorrect login attempts. These break-in attempts are recorded in a log to alert the System Administrator of potential hacker activity.

System Security

The following capabilities must be available.

Describe in detail the system security measures.

The system can prevent unauthorized system access or transfers from the system.

The system must encode messages to ensure storage security.

Administration

Mailbox Administration

The following capabilities must be available to the System Administrator.

Mailboxes can be added, deleted, or changed without service interruption.

Extension numbers can be changed without deleting messages or affecting the mailbox.

Describe how your system defines class of service. Mailboxes must be able to be given varying classes of service.

The system must allow customizable system prompts as an alternative to pre-recorded prompts from the manufacturer.

System Diagnostics and Alarms

Diagnostics must run 24 hours per day without system disruption.

Describe how alarms are logged and monitored.

The system must provide a history log that records system problems. Please describe.

Administration Terminal

Describe the system's administrative interface.

The system supports remote administration.

System Management Reports

Describe the available standard reports, as well as viewing and printing options.

Networking

Capabilities

The system must be able to support the AMIS Analog Networking protocol.

The system must support a a digital networking protocol. Describe.

When addressing a message by name or mailbox number to a remote user, the name is played back for verification.

The system can deliver and retrieve messages from a networked system on the same call.

PBX Integration

Integration

Describe the integration between the PBX and the messaging system.

PBX/Messaging Port Integration

Ports must be universal, allowing the system to support all features without requiring dedicated ports.

Describe how port contention problems between the messaging system and the PBX are eliminated.

Ports must not be required for activities such as lighting message-waiting lamps.

The system receives call disconnect information from the PBX and immediately terminates the session.

If a port has trouble, the system takes it out of service and automatically notifies the PBX to stop sending calls to that port, without requiring manual intervention.

The message waiting lamp will remain lit until all new messages are accessed.

Technical Specifications

Capacities

Mailboxes must be equipped with voice, fax, visual desktop and e-mail access capabilities as standard. State the maximum number for the proposed system.

Mailboxes should be available to be purchased in small increments in order to meet current needs and yet be expandable to meet future needs.

Ports must be universal. State the minimum and maximum number for the proposed system.

If available, additional port capacity can be purchased as needed.

Disks must be enabled for the full amount of message storage available on that disk. State the number of disks and storage for the proposed system.

Storage Utilization

The system must compress long pauses in recorded messages to efficiently utilize space on the hard drive. State the speech algorithm used.

Environmental, Physical and Electric Requirements

Provide the environmental requirements for the proposed system.

Provide the physical dimensions and weight of the proposed system.

Provide the power requirements for the proposed system.

C. Call Center Requirements

This section specifies the call center requirements.

Configuration Details

The system must be designed for the Wired-For Capacity. With Wired-For Capacity, cabinets and shelves/carriers are configured in the system and only the port cards must be added to achieve Wired-For quantities. The system must be equipped with sufficient CPU power, memory, shelf space, power, and all other equipment necessary to accommodate the Wired-For size and traffic. The Wired-For quantities represent expected growth and the Equipped quantities are the at-cutover requirements.

Requirements	Equipped Capacity	Wired for Capacity
Agents		
Agent Logins		
Splits/Skills		
Announcements		
Supervisor Voice Terminals		
Supervisor CRTs		
Voice Response Unit (VRU) Ports		
Anticipated Busy Hour Calls		
Average Length of Call		

Basic ACD Features

Integrated PBX/ACD Solution

Can your PBX system provide ACD functionality without requiring a separate ACD system, server, hardware, or software? Is there a separate cost for providing ACD functionality or is this a standard feature?

Order of Arrival Queuing

Can calls be delivered to agents in First In First Out order (order of arrival queuing)?

Priority Queuing

Can calls from certain trunk groups or to certain dialed numbers be assigned a higher priority than other callers? Can calls which overflow from another split be queued ahead of other calls? Describe the options.

Queue Capacity

State the number of queues available and the number of queue slots available.

Queue Size Limiting

Can the split/skill queue size be limited?

Most Idle Agent Hunting

Can calls be distributed to the "most-idle" agent? Describe your algorithm for selecting the most idle agent.

Music On Queue Delay

If an agent is not available to handle a call, the call must queue for the next available agent. The system must be able to provide music on hold until the call is answered.

Queue Specific Delay Announcements

For basic ACD applications, callers must be provided a queue specific (different for each queue) delay announcement if an agent is not immediately available to answer a call. After waiting a specified period of time, a second announcement must be provided. This period of time between announcements must be programmable by queue. Also, the second announcement must repeat after a specified period of time. For some applications, it is required that a queue specific announcement be provided first before talking to an agent even if an agent is immediately available. Describe your ability to meet these basic announcement requirements.

Agents in Multiple Split/Skill Groups

Can agents be members of multiple splits/skills? If so, how many?

Most Idle Agent Status for Agents in Multiple Groups

If an agent is a member of multiple split/skill groups, how does this affect the distribution of calls based upon Most Idle Agent? When we are delivering a call for a specified split/skill, can we choose whether we want to consider the agent Most Idle for only the split/skill in question or the agent Most Idle across all of their defined split/skill groups.

Automatic Availability after Each Call

Agents sets must have the ability to be automatically available to take the next call upon disconnecting from the current call.

Wrap Up Work

Agent sets must have the ability automatically to go into a wrap-up, unavailable work state at the completion of a call. Can agents also temporarily remove themselves from the call queue to perform call related tasks?

Time spent in this work state must be included in the individual agent and group statistics.

In addition, the supervisor should be provided with a visual real time indication of agents spending time in this state. Please describe.

Timed After Call Work/Agent Pause Between Calls

Can the system force the agents to be put into an ACW state for a predefined period of time in order to provide rest time between calls, pace calls to the agents, or limit the amount of time an agent spends in completing wrap up work? Does your proposed solution support this capability? Please describe.

Can the agent get back into queue immediately after the call?

Temporarily Unavailable Mode

When unavailable for calls for reasons such as scheduled breaks, lunch, group meetings, etc., agents must have the ability to temporarily remove themselves from the call queue but still have this time tracked as staffed time without logging out. Describe how your proposed solution supports this capability.

Multiple Call Handling

If an agent is handling a call and needs to put the call on hold and wait for further information can the agent go ahead and request that an additional ACD call be delivered while waiting? Can one or more additional ACD calls be forced to an agent?

Redirection of Unanswered Calls

Can the system redirect unanswered calls? For example, what happens to a call that is sent to an agent who left a position without logging out or a failed VRU port? Can the supervisor be notified of this condition? How can you keep calls from continually being sent to this agent position?

Call Overflow

Can calls be redirected to other agent groups on the same system? Can calls also be overflowed to an attendant, automated attendant, voice messaging, or voice response system? Please describe. Include any limitations.

Night Service

All calls for each ACD group must be redirected to a different extension after hours. Supervisors must be able to activate this from their voice terminal. Each group may have different hours of operation.

Abandoned Call Disconnect

Automatic and immediate disconnect of calls after a calling party hang-up.

ACD Groups for Modems, Voice Response Ports

Can ACD groups be defined for modems, voice response ports, recorders, and other non-human members that provide automatic login and availability and ACD-type statistics for the group? Will all members of the group be automatically logged in and available after a system restart?

Emergency Notification

The system must allow agent positions to activate an alarm notifying a supervisor of an emergency condition. The system must also have the ability to automatically record the trunk number and/or calling number if provided, agent position involved in the emergency, and activate a recording of the conversation if recording equipment is provided. Does your proposed solution support these capabilities? Please describe this process.

Agent Request for Assistance

The agent set shall have the ability to directly signal the supervisor when the agent requires assistance handling an active call. Answering of agent requests for supervisor assistance must be provided on the supervisor's telephone set with special audible and visual notification, so that the supervisor may readily identify that an agent requires support. The LCD or alphanumeric display should provide identification of the calling agent to the supervisor without referring to the supervisor terminal. An agent's request for supervisory assistance should be forwarded to a backup supervisor when the primary supervisor is busy or unavailable. Does your proposed solution support these capabilities?

Supervisors As Agents

Can supervisors make themselves available to receive ACD calls during busy periods?

Logout of Agents by Supervisor

Can supervisors logout agents from their own voice terminal without having to go to the agent's desk? Can they log them out from a remote location?

Monitoring Agent Conversations

The supervisor should be able to monitor an agent's conversation for training or administrative purposes from the supervisor telephone, without plugging in to the agent's telephone set. Does your proposed solution support this capability? State whether a special type of voice terminal is required for either the monitored or monitoring telephone.

Both silent monitoring and tone indication to the agent during monitoring should be available. Are the parties on the call given an indication that the call is being monitored?

Can consecutive calls be monitored without any action by the observing party?

Does the monitored telephone have access to all normal switch features while Service Observing is active?

Does the system allow monitoring of calls from a remote site? What security measures are provided?

Does the system offer a voice terminal option for monitoring directly at the agent's voice terminal for "ride along" agent training? Please explain.

Systemwide ACD Functionality

Are there any inter-cabinet restrictions? Can ACD agents for the same split/skill be physically located in different modules/nodes?

Incoming Call Information Display

Agent shall receive identification of trunk group or type of incoming call when the call is presented at the agent position. What type of information can be displayed on the supervisor's voice terminal with each incoming call?

Access to Real Time ACD Statistics On the Voice Terminal

Each agent set must have the ability to view a customizable list of call center MIS information on the digital display of the agent telephone. This information can individually configured or selected from a pre-defined list of MIS templates such as current split/skill performance, application performance, and individual performance status. Does your proposed solution support these capabilities? If so, how many individual items and/or templates are supported?

Can agents and supervisors be notified via the voice terminal indicators when thresholds are reached for individuals and groups?

Can the agent receive continual real-time display updates of ACD statistics via the telephone display including such information as a comparison of individual performance to group averages or objectives?

The display of ACD statistics on the voice terminal must include, but is not limited to, the following items:

- ***# acd calls***
- ***# calls abandoned***
- ***# calls waiting***
- ***oldest call waiting***
- ***average speed of answer***
- ***average time to abandon***
- ***percent in service level***

- **# agents staffed**
- **# agents available**
- **# agents on acd calls**
- **# agents on extension calls**

Agent and Supervisor Voice Terminals

The agent and supervisor telephone sets should use state-of-the-art digital technology, and should provide a display for call related information, ACD statistics display, and other applicable information. Does your proposed solution support these capabilities? Describe and provide illustration of the proposed voice terminals for ACD supervisors and agents.

Proprietary Voice Terminals

Is a proprietary agent voice terminal required? For low-volume basic ACD applications, can any type of system voice terminal be used by ACD agents?

Agent Headset/Handset Operation

The agent telephone set must be able to support both an agent headset and an agent handset. There must be volume controls for either option.

Headset Compatibility

Are the agent voice terminals compatible with industry standard GN-NetCom headsets?

Audible Indicator During Headset Operation

During headset operation, the system shall have the ability to provide the agent with an audible zip tone prior to the automatic connection of an ACD call to the agent. Does the agent voice terminal offer both ringing and zip tone options?

Hold, Transfer & Conference Buttons

A dedicated, fixed feature button, for each function, will be provided on the agent and supervisor telephone set. The system will have the capability for agents and supervisors to set up conference calls for up to 6 parties (including the agent or supervisor) as required without requiring attendant assistance. Does your proposed solution support these capabilities?

Non-ACD Functionality

Does the agent have to be logged in to an ACD group in order for the agent voice terminal to generate a ring? Can the extension function as a normal system extension when the agent is not logged in? Does the agent's extension have full system extension capabilities? For example, can agents transfer and conference calls, access abbreviated dialing lists, and so on?

Outgoing Calling Capabilities (Non-ACD)

Can agents and supervisors place outgoing calls? How does the system track outgoing calls on ACD reports? Can agents be restricted from placing certain types of outgoing calls while allowing other types of calls? Can agents access least-cost routing features for outbound calls?

Dual Headset Option

Do you offer an ACD voice terminal equipped with two jacks in order to permit a supervisor to plug into the telephone set for training purposes.

PC Based Telephone Option

Do you offer an ACD voice terminal that is controlled by a PC-based agent interface? Please describe options for implementing screen based telephony control.

Agent Personalized Greeting Option

Do you offer an ACD voice terminal option with the capability for agents to record personalized greetings that can be played to the caller prior to connection to the agent?

Advanced ACD Call Handling, Treatment, and Routing Features

Entering Wrap Up Codes

Can agents enter codes to identify events that occurred during a call? Can an agent be forced to enter wrap up codes before becoming available for another call? How many codes are available? Explain.

Entering Call Identification Codes

Can agents associate other types of identifying information, such as account codes or service codes, to particular calls? Can your system support up to sixteen digits per code? Can an agent be forced to enter codes before becoming available for another call? How many codes can be supported? Explain.

Audio Difficulty Trace

When an agent experiences static or a noisy trunk, can this audio difficulty be easily reported and traced? What types of audio difficulty tracing capabilities are available?

Redirection of Unanswered Calls to Alternate Destinations

If a call is sent to an agent who left a position without logging out or a failed VRU port, can the system redirect the unanswered calls to an alternate destination rather than just back to the head of the queue?

Automatic Call Processing After Disconnecting from an Agent

Can callers be instructed to remain on the line after talking with an agent and be automatically connected to other service options or applications such as an IVR application, customer satisfaction survey application, etc. without requiring the agent to manually transfer the caller to the application?

Queuing Calls to Multiple Splits

Does the system provide multiple split/skill queuing? State the system capacity for simultaneous queuing to agent groups.

Queue Size Limiting by Application

Can queue size be limited by the dialed number or application or can only the split/skill queue size be programmed?

Route Calls Directly to An Agent

Can the system route direct inward dialed (DID), attendant directed, or private network telephone calls directly to an ACD agent? Please explain.

Monitoring the Customer Experience

Can silent monitoring be directed at a particular application or call type and automatically follow the call as it is transferred to different agents, announcements, prompts, and so on? Can the monitoring session follow the call to a distant center?

Can silent monitoring be directed at a particular application or call type, yet avoid hearing announcements and music and only begin observing after the agent answers the call?

Remote Monitoring

Can a user dial a number to gain access to the system, supply a password, and be granted access to monitoring agents and applications from a remote site? Team Leaders, Directors, etc. should be able to perform silent monitoring when out of the office or when dialing into a remote office. Monitoring should be restricted by Class of Service.

Automatic Load Balancing and Conditional Routing

Does your proposed solution support automated load-balancing capabilities and customized conditional routing capabilities? Can comparisons be made in queue conditions before routing calls to ensure that split/skills are not overloaded? Can comparisons be made in queue conditions after routing calls to determine if calls should be re-routed to alternate destinations? Please describe your system's conditional routing capability.

Call Routing Commands

Does the ACD promote an autopilot approach to call routing by providing routing tables of selectable commands and conditions? Does this feature use standard English commands? List all commands available.

Call Routing Table Capacity

How many distinct routing tables are provided? How many steps can be in each table? Can call routing steps be "chained" together? What is the maximum number of steps that can be executed?

Integrated Routing Database Tables

Can databases tables of numbers be maintained in the system for specialized routing purposes? For example, can you have a table of priority customers which would receive priority routing and possibly queue to a dedicated agent? Please state how this can be accomplished and the limitations of your integrated database table solution.

Call Routing Comparators

Are comparison operators such as "less than", "greater than", etc., available for constructing call routing commands. List comparators available and give examples of their use.

Digit Matching for Call Routing

Can the ACD system match ANI or other digits in routing tables using sequences such as 303+ which would identify and route all calls from area code 303 to a certain destination. What type of digit matching is available?

Answer Supervision

Can the call routing program determine when answer supervision is returned to the network? Can this vary according to current conditions? Describe the options available to provide answer supervision?

Routing Based on DNIS

Describe the system's ability to route calls based on Dialed Number Identification Service (DNIS).

Routing Based on ANI

Describe the systems ability to route calls based on Automatic Number Identification (ANI).

Information Indicator (II) Digits Routing

Can the system route calls based upon information about the type of the originating line provided by ISDN network facilities. In this way, calls from pay phones, cellular phones, or motelphones, for example, can receive unique routing? Describe this feature.

Support for Network Provided CINFO Digits (Caller Information Forwarding)

Describe the system's ability to collect caller entered digits (ced) and customer database provided digits (cdpd) supplied by the network in an incoming call's ISDN PRI SETUP message and provide routing based upon these digits.

Estimated Wait Time Predictor

Describe the system's ability to predict the wait time. How accurate is this prediction?

Estimated Wait Time Routing

Can the system use the estimated wait time or average speed of answer to make routing decisions? Can the system predict the estimated wait time for various split/skills and pick the best destination for a call to avoid excessive wait times and subsequent overflow? Can multiple split/skills which might typically be considered backup or overflow destinations be considered up front if it is predicted that the call will overflow anyway? Describe this capability.

Estimated Wait Time Announcements

Can the system announce to the caller the estimated wait time for the next available agent? Specify the options available for informing callers of their estimated wait time.

Priority Routing

Does the system provide priority routing? Does the system have the ability to prioritize calls based on variables such as length of time in queue and caller response to a prompt? Can the priority be changed after the call is initially queued?

Time of Day, Day of Week Routing

Can the proposed system provide alternate routing automatically based upon time of day and day of week? How are calls routed to night service after hours? Provide an example of how Time-of-Day, Day of Week routing is accomplished.

Holiday and Special Date Routing

Can the proposed system provide alternate routing for holidays and special dates automatically based upon time of day and day of year? Provide an example of how Time-of-Day, Day of Year Holiday routing is accomplished.

Automatic Overflow Routing

The system must provide the ability to automatically route incoming calls to alternate groups within the ACD dependent upon incoming call volume and/or number of calls waiting in queue. Each group, application, and/or trunk group will have the ability to overflow uniquely, dependent upon business requirements.

Overflow Destinations

Can calls be automatically overflowed to voice messaging or a voice response system? Can calls be automatically routed to a remote location based upon conditions in the call center including call volume and time of day? Please list overflow destinations.

Integrated Auto-Attendant

Can your ACD system provide integrated auto-attendant routing functionality such as "If you know the extension of the party you wish to speak with, you may dial it now"? Can your ACD system prompt callers for the type of service they desire, i.e. "Press 1..., Press 2..." Can your system support these capabilities internally within the proposed PBX/ACD system without requiring an external IVR system or announcement device? Does this require an adjunct voice processing system? If so, please describe the proposed platform, manufacturer, features, integration, and connectivity.

Route by Caller Prompted Information

Can your ACD system request information, such as a zip code or account code, before the call is sent to an agent and then route the call based upon that information? The system must have the ability to prompt a caller for up to 16 digits of information.

Routing by Voice Response Integration

Can information that the call routing commands collect about the caller (such as account number, position in the queue, estimated wait time, and menu selection) be forwarded to a voice response unit (VRU) and used for routing purposes, database lookups, or trigger IVR applications? Please describe what information can be forwarded and how. Can the VRU return information to the ACD such as caller identification information or routing destinations?

Maintaining Queue Position

Can the call routing program connect the caller to a voice response unit (VRU) while the call remains in queue for an agent? Does an incoming call lose its place in queue when the call is routed to voice applications, audio text announcements, or other VRU applications?

Database Assisted Routing Option

Can the routing commands be used to obtain information from another source or a database before routing the call?

Dynamic Routing Administration

Can the call routing tables be administered and controlled from a call center manager or supervisor terminal in real-time, without adversely affecting call processing? (Assignable by supervisor login ID.)

How do you change call routing in real-time? Is it dynamic and immediate?

Can more than one person be making changes to different screens or tables simultaneously? Please explain.

Testing Routing Instructions

Can call routing and announcement steps be tested prior to production, at the system administrator level based on customer defined permissions?

Can contingency call routing programs be stored in the system? How quickly can a contingency program be substituted for the live program?

Graphical Routing Administration Option

Do you offer an option for administering call routing through a Windows-based graphical user interface? Does your graphical solution provide drag and drop access to available functions in order to design the callflow graphically? Can comments be added to the design and be viewed graphically? Please describe.

Can graphical call routing be designed on an offline PC then uploaded at a later time? Can a call tree for one ACD be uploaded to other ACD's in order to support the same application at multiple locations without having to create and edit the application from scratch at each location?

Can frequently used sequences of routing steps-such as time of day tests, or music loops-be stored offline and quickly 'pasted' into new trees as needed instead of re-creating them for each new application? Can templates be created for common call-handling situations?

Multiple Announcements Per Call

Can multiple announcements be played to a caller? How many announcements can be administered per ACD split/skill?

Multiple Music Sources

Does the system support multiple music sources for callers in queue? If so, how many? How many music sources can be administered per ACD split/skill?

Incoming Call Announcement

For agents which handle calls for multiple applications, can the system provide a brief announcement heard only by the agent indicating what type of call is arriving so that the

agent can greet the caller appropriately? Can the voice terminal also display this information to the agent before delivery of the call?

Advanced ACD Skill Group Features

Skill Assignment and Preference Levels

The system must be able to assign individual skills to each agent. (i.e. bilingual, training or experience level, product knowledge, customer knowledge, etc.). Individually assigned skills must be able to be ranked and rated in terms of priority, proficiency, or preference. Does your proposed solution support this capability? Is this function provided natively within the PBX/ACD or does it require an external server? If an external server is required please state:

What is the maximum number of simultaneous skills queries and routing requests that can be executed at a time

In the event of a server or link failure how is call processing affected?

What are the backup and recovery options?

Skills-based Routing

Can the system match the requirements of the caller to an agent with the skills to handle the call? How is this accomplished?

Agent Call Handling Preferences

When an agent becomes available for a call, can your system assure that the agent will receive a waiting call for his/her primary assignments even if a secondary skill assignment call has been waiting longer?

Alternatively, on an agent by agent basis, can you specify that an agent always receive the highest priority oldest call waiting for any of the agent's skill competencies or a "greatest need" basis? Please explain.

Changing Agent Skill Assignments

Can the agent skills be added or removed dynamically while agents are on calls or must agents log out first? Can agents be logged into one or more splits/skills when being moved between agent groups? Can split/skill assignment be changed by both agents and supervisors?

Virtual Seating or Free Seating

The system shall support the concept of virtual seating. Agents can log-on from any physical telephone instrument within the system. Agents on the proposed system will be logically defined, rather than requiring a physical telephone extension and termination. Each agent and supervisor on the system should have an individually assigned log-on identification number which permits individual statistics to be collected by the ACD

management information system. Multiple log-on events by the same individual during a work period at different terminals should be tracked as one "shift".

Does the system provide the ability for all agent parameters including personal extension number to follow the login ID and be independent of the physical location of the voice terminal? List the characteristics that follow the agent.

Monitoring a Logical Agent

Can the system monitor calls by agent login rather than position or extension number?

Direct Agent Calling

Can the system route direct inward dialed (DID), attendant directed, or private network telephone calls directly to an ACD agent and treat these calls as ACD calls? Please explain.

Can calls queue to an individual agent? How is the agent notified? Can a delay announcement be provided if the call queues for an individual agent who is on another call?

What happens to an unanswered call that has been routed or transferred directly to an agent?

How are calls made directly to agent extensions classified for reporting purposes?

Tracking Agent Activities by Reason Codes

In order to give our call center managers detailed information about how agents spend their time and to develop precise staffing forecasting models, agents must enter a numeric code that describes their reason for entering non-available work modes or for logging out of the system. Describe your systems ability to provide this level of agent tracking. How many codes are supported?

Agent Occupancy

Please describe your proposed systems ability to address agent fairness relative to equitable agent call distribution for multi-skilled agents. Can your system distribute calls to agents based on ACD work occupancy instead of most idle or longest current idle time? An occupancy measurement would consider the total amount of time an agent has been occupied since logging on rather than just the longest time since the last call.

Recorded Announcement Features

Announcement Hardware

The system shall provide callers in the queue with a variety of announcements. This capability should be inherent within the PBX/ACD architecture avoiding the need for external announcement devices and/or IVR servers. Please describe your proposed announcement hardware technology. Is the announcement equipment internal to the

system or must it be mounted externally? Are announcement ports allocated dynamically?

Announcement Capacities

How many announcements are supported by the PBX/ACD system? What is the maximum recording time supported?

How many callers can simultaneously listen to a single announcement?

Announcement Access

The supervisor should, dependent upon security code, have the ability to control and change announcements and messages pertinent to his/her group. Supervisors should be able to make new recordings or change recordings directly from his/her own telephone set. Can announcements be changed from a remote location? Describe this process for both local and remote announcement access.

General Announcement Features

Can callers be required to listen to an entire announcement before being connected to an agent?

If an agent becomes available before an announcement is completed, can a call be immediately connected to the agent?

Does the system allow us to define announcement delays?

Does an incoming call lose its place in queue when the call is connected to an announcement?

Call Center Messaging Features

Can callers be automatically directed to voice mail to leave messages when the call center is closed or when all agents are busy?

Can you automatically route a call to voice messaging instead of queuing if the wait time is above a certain threshold?

Can the caller be given the option to continue waiting in queue or to leave a message?

Can an estimated wait time announcement be provided to help callers make an informed decision about how long they are willing to wait? Specify the options available for informing callers of their estimated wait time.

If the caller chooses to continue to wait, does the call retain the original position in queue?

Can messages be stored in a group mailbox? If so, how are the agents notified that messages are waiting? Can an agent be notified when voice mail messages are left for the personal extension number and separately for the ACD group?

Please explain.

Callback Messaging Options

Does the proposed system support an option for callback messaging capability? Can messages be scheduled for callback, at a specific time and date, by the caller? What options are available to the caller?

Queuing Callback Messages for Delivery to Agents

During slower periods, can the system automatically offer agents the option of returning calls to customers who had called earlier and left messages? How are callback messages accessed by call center staff? Can messages queue for the agents and be automatically delivered? Please explain.

Automatically Launching Callbacks to Customers

When the agent receives a callback message from the queue, is the callback to the customer launched automatically or does the agent have to dial the customer callback number? Please explain the options that the agent has for handling the callback message.

Displaying the Callback Message Queue

Can the supervisor to display customer messages and their status on a Windows PC? Can Callback messages be played back directly from the supervisor's PC? Can the supervisor reschedule, delete, re-prioritize, and launch messages to the agents from the PC? Describe the supervisor's graphical user interface.

Business Plan Routing

Can the goals and requirements of our business plan be incorporated into the system's call routing algorithms?

Achieving Desired Service Levels

Can your system distribute calls to achieve service level objectives for different call types as defined by our business needs? Can the system monitor whether service levels are above or below the objectives, and automatically adjust routing calls out of their normal place in queue (oldest call first) to attempt to meet our desired service level objectives?

Percent Allocation of Agent Time

To control the amount of time agents spend handling certain types of calls, can agent time be allocated on a percentage basis and can this allocation of agent time be incorporated into the system's call routing algorithms? Please describe your system's capabilities. Is an external CTI application required to accomplish this?

Automatic Queue Supervision and Activation of Reserve Agents

Can certain agents be defined as "reserve" agents for certain skill sets? Can the system monitor queue thresholds and expected wait times in queues and automatically activate reserve agents as needed in order to prevent bad service from occurring. Is supervisor intervention required to monitor the queue thresholds or to activate the agents?

Multi-Site Call Center Options

Redirection to Alternate Sites

Can calls be redirected to other agent groups on systems at another geographical location? Please describe.

Intelligent Call Routing between Sites

Can the system perform an intelligent query of a distant system to check status before redirecting a call to another ACD? Is it necessary to "tie up" a voice channel for each inquiry or can the query be performed on a separate signaling channel?

"Virtual" Call Center Operations

Can the proposed system support a multi-site call center environment with multiple distinct sites as a single virtual call center operation? Can calls be allocated between sites based upon agent skills, agent availability, queue times, and other criteria? Please describe your system's capabilities for implementing a virtual call center enterprise and whether ACD personnel are capable of controlling this routing function as business needs dictate.

Load Balancing Across Multiple Sites

Please describe the methodologies utilized to load balance calls among all available sites. How would you achieve uniform Average Speed of Answer among all/any networked sites in order to provide consistent service and maximum resource efficiency?

Multisite Predictive Routing

To eliminate the inefficiencies of queuing calls to multiple sites, can your system predict the best location to service an incoming ACD call? Based upon our defined criteria, can your system predict and route the call to the correct location up front rather than waiting in multiple queues at multiple sites for the first available agent then sending the call? Describe these capabilities.

Network Call Transfer and Deflection

When interflowing calls between sites, can your system take advantage of Network Call Transfer and Deflection provided by the public switch telephone network to redirect an

incoming ISDN call without requiring trunks to be tied up at the original destination after the call rerouting takes place?

Networking Connections between Sites

What physical means are used to interconnect each networked site (i.e. Dedicated tie-lines, ISDN-PRI/BRI, ISDN switched services, VTNS, IP, ATM, Q-Sig, etc.)?

Unique Call Identification Tag

Can a unique tag be associated with each call when it originates and remain with the call throughout a multi-site network to facilitate cradle to grave call tracking?

Multi-site Information Forwarding

In a multi-site network, can the proposed solution pass call center statistics along with the call for accurate wait time calculations required for real time monitoring, historic, and cradle to grave reporting? For example, can the wait time at Center A be passed to Center B in order to correctly represent wait times with the call type, ACD groups, and skill sets where they were answered? Do system reports reflect interflowed call activity? Please describe.

Remote Agent Options

At Home Agents

The system shall support true At Home Call Center Agent functionality. These remote call center agents should be able to work at home with no loss of call center agent functionality. Can At Home agents use the same voice terminal that onsite agents use? Describe your solution.

At Home Agents With PC Based Telephone Interface

Can your system provide At Home agent voice terminal solutions via the agent PC with the agent PC connected to our network for data applications? Describe completely your At Home PC based agent solution options.

Remote Branch Offices

Can your system support agents located in a small remote branch office environment? Please describe options for this capability.

Tracking Remote Agents

What type of flexibility will the proposed solution provide with respect to split membership? Can remote agents be members of splits that also contain local agents or do they have to be in a dedicated split?

Can the call management information system track remote agent activity? The MIS tracking for off-premises agents must be the same as that for on-premises

agents. Can the agent working at home be seen in a real time view on a supervisor's workstation whether that supervisor is in the call center or at home themselves? Do at home agent's activities show up on your standard reports?

Management Information System Options

Basic Internal Reporting Option

Do you offer an option for basic low-cost, integrated reporting that does not require administration or external processors or external storage?

Both real time reports and historical reports are required. Historical reports should be available for hourly or half hourly intervals. These reports can be displayed on a video display terminal in real time, printed immediately, scheduled to print at a later time, or scheduled to print periodically at times you specify.

Real Time reports should update automatically approximately every 30 seconds.

Can you also request an update on demand?

How long is historical data stored?

List and describe real time and historical reports available.

Basic Graphical, PC based Reporting Option

Can you provide a graphical user interface for supervisors to monitor call center activity on a PC?

Can you provide real-time graphical reporting (such as bar-chart, pie-chart, time trace, wallboard, or text report display formats) to Single or Multiple Supervisors?

Can multiple reports be displayed on a PC screen at the same time? List and describe reports available.

Can your reporting system support multiple external wallboards for display of real-time data to various ACD groups. Can text messages created by supervisors be displayed on wallboards?

Can you set thresholds on data items that alert supervisors both visually and audibly when thresholds are reached?

Can supervisors customize their views for real time monitoring of the items and resources of interest in the call center?

Can you provide long term storage of historical ACD data? How long is data stored? Where is data stored and how can it be accessed? Can data be exported to file or to other applications? List and describe historical reports available.

Can reports be scheduled? Can reports be printed at multiple printer destinations?

How many supervisors terminals can be provided?

Maximum Reporting Option

Supervisor Interface

Does the system support PCs as supervisor MIS terminals? The supervisor interface should be a Windows-based application on desktop PCs with a graphical user interface. Supervisors should be able to reconfigure agents using a drag and drop point and click interface. Does your system support these capabilities? If yes, please describe the PC hardware requirements.

Local Area Network Connectivity

Can our supervisors access the management information system via a PC connected to our local area network using TCP/IP protocol or are hardwired, dedicated terminals required?

Network Printing

Can management reports be printed on network attached printers or must printers be dedicated and connected directly to the management information system? If dedicated printers are required, what is the maximum number of printers which can be directly connected to the system?

Customized, PC based, Real-Time, Graphical Displays

Supervisor terminals must be PC-based, graphics capable. Individual supervisors must be able to customize screens (colors, chart formats, sorting, etc.).

Multiple Windows

Does the supervisor interface support multiple windows? How many windows can be opened?

Real Time Monitoring

The system must support real time monitoring of agents, split/skill groups, trunk groups, and applications. Are reports available in both text based and full color, graphical formats that are easy to interpret at a glance?

How often can real-time reports be updated?

The supervisor must be able to see (in plain language and color graphical formats) each of the following items:

- *the active agents and the current individual agent status (whether on an active ACD call, in after-call work, waiting for an ACD call, or in an inactive or idle state). Describe the possible agent states that can be reported on.*
- *the number of agents currently in various work states such available, on ACD calls, in unavailable modes.*
- *drill down capability to see individual performance data for a given agent*

- *the current queue status including calls waiting, oldest call waiting, number of calls handled, number of calls abandoned, service level, etc.*
- *a display of how agent time is spent based upon assigned reason codes for unavailable non-call associated work modes. For example: how much time agents spent on breaks, in group meetings, training, etc. At least nine different reason codes are required for reporting time spent unavailable.*
- *a call handling time profile which displays the number of calls answered and abandoned according to increasing service intervals. For example, how many calls were answered and abandoned from 0-5 seconds, 5-30 seconds, 30-60 seconds, 60-90 seconds, etc.*
- *the number of times during the current interval that an agent reported a call event. This will assist us in keeping count of specific customer request or types of calls. At least nine different call events must be tracked.*

Exceptions and Thresholds

Can real time reports display color threshold indications for items that are exceeding desired levels such as number of calls in queue or oldest call waiting time? Describe this capability.

Are exception categories and thresholds definable? Can thresholds vary between different splits and applications or are they set for the entire system? Please provide details.

Can supervisors be notified of exceptions to their groups only or do all supervisors receive notification of all defined exceptions?

Can recent exceptions be displayed on demand? Are printed reports available for past exceptions? Please describe.

Comprehensive Historical Reporting

Historical reports must be available for agents, split/skills, trunk groups, and applications in interval, daily, weekly, and monthly formats. Both graphical and text based formats are required. Describe the standard historical reports provided with the system.

Can reports be printed on demand and on a scheduled basis?

How long can historical data be stored?

Can our company define the data storage interval in increments of 15, 30, or 60 minutes?

Custom Reporting Options

Fast, easy creation of custom reports from scratch is required. Describe options for creation of customized reports. Modification of existing reports to customize them for our reporting purposes is required. Does report customization include the ability to create custom data items and define custom calculations?

Open DataBase Connectivity

What database is used to store historical data for your management information system (MIS)? Is this database ODBC compliant?

Exporting Data

Can call center data be exported to file or directly to other Windows applications? Can data from this system be sent to another database system such as INFORMIX, Excel, or Lotus? What file formats are supported? Describe how this is accomplished.

Exporting Data to the Web

Can ACD reports be sent to our Web server for access on our Internet via standard Web browser? Describe how this is accomplished.

Access Security

What flexibility exists to tailor access permissions to the duties/needs of appropriate personnel? Can supervisors view certain splits and applications while being restricted from others? Can supervisors be assigned read only or read/write access? Describe the method of providing security and assigning permissions to the MIS.

Access by Multiple Supervisors

Can separate supervisors access the same information simultaneously? Can separate supervisors access different information and be performing different tasks simultaneously?

What is the total number of simultaneously logged in supervisors that can access the system at one time?

Remote Access

Can supervisors access the management information system and monitor and administer the call center from a laptop PC at remote locations?

Tracking Agent Activity

Can the system track all agent activity in chronological order?

Can reports be generated for groups of agents that are not members of the same split?

Can an agent's statistics be tracked continually when the agent is assigned to more than one split/skill during the course of the day?

Are agents able to move from terminal to terminal and have their statistics follow them?

Tracking Calls

How are transferred calls tracked by the MIS?

How does the MIS track and report abandoned calls?

Does the MIS track and report forced busy signals and forced disconnects? If so, explain how.

Can a single call record be created to track a call when the caller is transferred several times?

Are agent's requests for supervisor assistance tracked by the ACD reporting system?

Changing Agent Assignments

Can agent split/skill assignments be changed via the supervisor terminal? Can agents be active and logged in when changes are made or do the agents have to log off in order for the changes to take effect? Can you change assignments for more than one agent at a time? Describe this process.

Changing Routing and Call Treatment

Can routing changes and call treatment changes be performed from the supervisor terminal? Describe how this is accomplished.

Scheduling Routing Changes

Can routing changes be created and stored for holidays and special days up to a year in advance?

Scheduling Call Center Tasks

Can a supervisor define "macros" that allow the printing of reports, changes in announcements or call routing, grouping of agents, and so on, to be executed at a predetermined time? What capabilities does the MIS provide for batch reconfiguration activities?

Graphical User Interface Scripting

Can reports and other tasks be automated and scheduled from the supervisor's PC using a commercial scheduling package? Describe these capabilities.

Backup Process

What is the recommended backup procedure for the MIS system? Can backups be performed automatically?

Online Help

Does the system provide Windows-based online Help?

Reporting System Platform

Describe the hardware, software, and operating system required for your Management Information System platform. Can this system be customer provided? How does this system interface with the ACD? Are there options for redundancy?

Alarms and Error Conditions

In the event of system problems or errors, can the system generate an alarm and notify service personnel? Are errors and alarms logged in the system and can error logs be viewed by administrators?

Detailed Call Tracking and Reporting Option

Long Term Storage of Detailed Call Records

Does your system offer an option for long term storage of detailed call history records? Where are call records stored and how long can they be stored? What kind of detail is stored for each call?

Cradle to Grave Reporting

Does your system support a "cradle to grave" reporting option which would reveal exactly what happened to a caller from the time they entered your system until the time they hung up, and everything in between?

Web Browser Interface

Does your system support customized queries of detailed call records via an industry-standard Web browser to meet specific needs of different groups of users with Internet access?

Custom Queries

Can you create highly customized queries to zero in on particular calls of interest? Please give examples of your customized query capabilities.

ANI Analysis

Can your system provide detailed calling records based on ANI, call origination information (such as calls from payphones, prisons, cellular phones, etc.), abandoned calls, and malicious calls?

Multi-Site Reporting Options

Does your management information system support multiple locations? Multiple ACD systems? What are the total numbers of physical PBX/ACD systems that can be monitored by a single MIS server?

If the reporting system supports multiple ACDs, any supervisor (with the proper security) must be able to monitor and report on any of the call center locations or report on all systems in a combined report. Does the system support this?

Do you offer a real time reporting solution that can monitor more than 64 separate ACDs systems from a single point?

Forecasting and Scheduling Options

Integrated Forecasting Options

Does your Management Information System offer integrated Forecasting capabilities?

Workforce Management System Options

*Can your ACD system interface to a workforce management and scheduling system?
Please describe your capabilities.*

Service Objectives

How does your system take into consideration service parameters and service objectives?

Forecasting Call Volume and Agents Required

Describe your forecasting functionality and how it is utilized to estimate call volume, AHT (Average Handle Time), and agents required.

What If Forecasting

Does your product have the ability to provide "what if" forecasting scenarios?

Special Days Forecasting

How are factors like holidays, special campaigns, season trends, billing cycles, and other date of month influences taken into consideration?

Scheduling Employee Shifts

Describe how work shifts are assigned to employees.

Optimizing Schedules

Can you generate an optimal schedule for agents for each hour that meets the forecasted call volume taking into consideration agent availability, calendar management, and desired service objectives? What other controls or options can be taken into consideration for scheduling?

Scheduling Other Activities

How is non-phone related work scheduled?

Real Time Adherence

Does your software have real-time adherence? If so, is this included with the base package, or is it a separate module?

ACD Integration

Describe how data from the ACD is transferred to your system. What hardware or software is required in the ACD?

Real Time Monitoring

What tools are provided for Real Time Monitoring of the actual call volumes, service levels, etc., versus what was forecast? Can you customize this monitoring capability to focus on key measurements?

Reporting

What reports are provided with the software?

Wallboard Display Options

Integrated Wallboard Options

Can your reporting system support multiple external wallboards for display of real-time data to various ACD groups. Can text messages created by supervisors be displayed on wallboards?

Advanced Wallboard Systems

Do you offer an external wallboard control system which offers display of real time and historical ACD statistics on multiple wallboards as well as advanced features like custom calculations, thresholds, messaging? Please describe the features available with your advanced wallboard system and how it is integrated with your ACD system.

Can your wallboard highlight in color ACD statistics which are exceeding desired threshold levels?

Can a supervisor broadcast messages to one or multiple wallboards? Can a message be automatically sent to wallboards at a scheduled time, on demand, or when a defined threshold condition in the call center is reached.

Can supervisors perform customized calculations on ACD data and create new data items such as group averages, sums, and more for display on wallboards?

Can supervisors be notified via pager when defined thresholds are reached?

Desktop "Wallboard" Options

Can your system display wallboard information such as real time ACD statistics and Call Center Messages on the agent's PC? If so, describe your solution and its capabilities.

Product Migration Strategy

Provide a concise explanation of the product migration strategy that will be employed to ensure that Joliet Junior college will not purchase and install a system in 2009 that will be made obsolete by the introduction of next generation equipment in the near term.

IV. Implementation and Training

The implementation criteria are detailed in this section.

Implementation and Testing

Describe how your company manages the implementation and testing process, including the roles of key project personnel.

Implementation Plan

The successful bidder shall be required to present a detailed implementation plan upon bid award.

Describe what responsibilities Joliet Junior College must provide in order to house the proposed system.

Facility Coordination

Will you be responsible for coordinating facility installations with the local telephone company.

Acceptance Testing

Vendor shall describe and list a detailed acceptance test plan. Describe the criteria for assuring full system performance and outline how tests will be conducted to demonstrate proper installation.

Subcontractors

Vendor must be fully responsible for the acts and omissions of its subcontractors.

List the services you will be subcontracting.

Code Compliance

Vendor must guarantee that installation of the system will be in full compliance with all federal, state, and local government building and fire statutes, codes, regulations, and industry standards.

Facility Restoration

Vendor must be responsible for full restoration to original condition of all Joliet Junior College surfaces, buildings, and grounds.

Software Station Review Process

Describe the Software Review Process

Final Change Date

When is the last date vendor can accept changes to the products for installation?

Implementation Staff

Identify the makeup of the implementation staff that will be assigned to the proposed system, citing their training and experience on the system proposed. List industry and product specific certifications of the implementation staff that will be assigned to the proposed system.

Training Requirements

Joliet Junior College views training as a critical element of the communication system. Explain the training curriculum available to support the products recommended by the vendor's company in the technical solution.

Identify the training you provide for your staff and for your customers when upgrades and updates are released for the proposed system.

Station User and Console Attendant Training

Describe the vendor's plan for station user and console attendant training.

System Administrator Training

Describe the vendor's plan for system administrator training.

End User Manuals

Hard copies and electronic copies of user documentation must be left with JJC.

V. Warranty, Maintenance and Support

This section asks the vendor to delineate warranty, maintenance and support offerings.

Warranties

Description

Provide a detailed overview of all applicable warranties, including any exclusions.

Describe the responsibilities Joliet Junior College will assume during the warranty or maintenance contract period.

Service

Describe service provided during warranty.

Maintenance

Service Organization

Describe your service organization.

Expert Systems/ Artificial Intelligence

Describe the use of state of the art computer and artificial intelligence systems to support the vendor's maintenance effort.

Maintenance Staff

Identify the makeup of the maintenance staff that will be assigned to the proposed system, citing their training experience on the system.

Post Warranty Maintenance Options

Describe your maintenance options available after the warranty period.

Response Time

What are the vendor's response times to major and minor system failures?

Remote Maintenance

Discuss your remote monitoring, diagnostic and repair capabilities, focusing on your ability to quickly and accurately identify and resolve reported troubles.

Trouble Reporting

Explain your established trouble reporting procedures including:

- *A trouble report telephone number to be answered 24 hours a day, seven days a week.*
- *Whether or not the telephone is answered at all times by members of your support organization.*
- *Whether or not that person has direct access to specific information about our system.*

Trouble Tracking via the Internet

Do you provide a means to problem status tracking via the Internet?

Upgrades and Additions Procedures

Describe your procedures for software updates and upgrades.

Escalation Procedures

Describe your escalation procedures.

Alarms

Discuss the capability of the proposed system to automatically call for help when alarm conditions occur.

VI. Terms and Conditions

In this section the vendor should provide a generic statement of compliance which includes the extent of vendor's compliance with terms and conditions stipulated by Joliet Junior College.

Information, Discussions, and Disclosures

Information Outside the RFP Document

Any information provided by Joliet Junior College or any vendor prior to the release of this RFP, verbally or in writing, is considered preliminary and is not binding for Joliet Junior College or the vendor.

Black Out Period

The vendor must not make available nor discuss the Request for Proposal (RFP) or any parts of the proposal to or with any employees of Joliet Junior College from the date of issuance of the RFP until the proposal submission date unless allowed for purposes of clarification by Joliet Junior College's Director, Business and Auxiliary Services in writing.

Cost Disclosures

The vendor must not make available nor discuss any cost information contained in the sealed copy of the proposal to or with any employee of Joliet Junior College from the date of issuance of this RFP until the contract award has been announced, unless allowed by Joliet Junior College's Director, Business and Auxiliary Services in writing for the purpose of clarification or evaluation.

Addenda

Interpretation

No interpretation of the meaning of the drawings, specifications, or other bidding documents, or correction of any apparent ambiguity, inconsistency, or error therein will be made orally to any vendor.

Every request for such interpretation or correction should be in writing, addressed to the Director, Business and Auxiliary Services In case Joliet Junior College finds it expedient to supplement, modify, or interpret any portion of the bidding documents prior to the proposal due date, such procedure will be accomplished by the issuance of written addenda to the RFP which will be mailed or delivered to all prospective vendors at the respective address furnished for such purpose.

Addenda

All addenda will become part of this RFP and be responded to by each vendor.

All addenda must be acknowledged in writing in the proposal submitted by the vendor.

This RFP, any subsequent addenda, and any written responses to questions takes precedence over any information previously provided.

Insurance

Insurance to be Provided

The vendor must provide all necessary Workman's Compensation Insurance, General Liability Insurance, Automobile Liability Insurance, and where applicable, Products Liability Insurance, with Joliet Junior College being included as a named insured on the liability insurance policies.

Certificates of Insurance

Certificates of Insurance on all such insurance coverage carried by the vendor must be furnished to Joliet Junior College prior to commencement of any work.

Minimum Limits of Liability

The successful bidder will be required to furnish a certificate of insurance in the following amounts:

The insurance coverage required here-in-under shall be the minimum amounts maintained by the Contractor and Subcontractors until all Work is completed and accepted by the Owner.

The Contractor will purchase and maintain “all risks” Builder’s Risk property insurance subject only to such exclusions as have been specifically approved by the Owner in writing.

A. Workers Compensation

1. **State: Statutory**
2. **Applicable Federal: Statutory**
3. **Employer’s Liability:**
 - a. **\$1,000,000 per Accident**
 - b. **\$1,000,000 Occupational Disease**

B. Commercial Comprehensive Liability- Primary Non-Contributory Endorsement Required.

1. **Each Occurrence: \$2,000,000**
2. **Products/Completed Operations Aggregate: \$2,000,000**
3. **Personal/Advertising Injury: \$2,000,000**
4. **General Aggregate: \$2,000,000**
5. **Policy shall include: \$2,000,000**
 - a. **Premises: Operations**
 - b. **Independent Contractors Liability**
 - c. **Products and Completed Operations: Maintained for minimum of one year after date of final Certificate for Payment, in full amount of the limits specified above.**
 - d. **Contractual Liability**

C. Business Auto Liability (including owned, non-owned and hired vehicles).

1. **Bodily injury**
 - a. **\$1,000,000 per person**
 - b. **\$2,000,000 per accident**
2. **Property damage: \$1,000,000 OR**
3. **Combined Single limit: \$1,000,000**

D. Umbrella

1. **Umbrella Excess Liability: \$4,000,000**
2. **If the Contractor’s Workers Compensation, Commercial General Liability and Business Auto policies do not have these minimum limits, an**

Umbrella policy written by an insurance company acceptable to the Owner may be used to meet the minimum limits required.

Joliet Junior College will be exempt from, and in no way liable for, any sums of money which may represent a deductible on the insurance policy. The payment, if any deductible applies, will be the sole responsibility of the vendor providing insurance.

Royalties, Patents, and Licenses

Patent and Copyright Infringement

Vendor will defend or settle, at its own expense, any claim or suit against Joliet Junior College alleging that any vendor products furnished under the Agreement infringe any United States patent or copyright. The vendor will also pay all damages and costs that by final judgment may be assessed against Joliet Junior College due to such infringement. Joliet Junior College will promptly notify the vendor in writing of such claim or suit and expect the vendor's obligation to be as sole control of the defense or settlement of such claim or suit. Joliet Junior College will cooperate with the vendor in a reasonable way to facilitate the settlement or defense of such claim or suit. The vendor will not be responsible if the claim or suit arises from Joliet Junior College's modifications, or from combinations of products provided by the vendor with products provided by Joliet Junior College or others.

Vendor Obligations

If any vendor products become, or in the vendor's opinion are likely to become, the subject of an infringement suit, the vendor will:

- 1. Procure for Joliet Junior College the right to continue using the applicable product;***
- 2. Replace or modify the product to provide a non-infringing product that is functionally equivalent in all material respects; or***
- 3. Refund the purchase price or one-time software license fee less a reasonable allowance for use.***

Exclusive Remedies and Limitations of Liability

Inclusions

For purposes of the exclusive remedies and limitations of liability, vendor will include itself, its parent, subsidiaries and their affiliates, and the directors, officers, employees, agents, representatives, subcontractors, and suppliers of all of them; and "damages" will refer collectively to all injury, damage, or loss incurred.

Liabilities

The vendor's entire liability and Joliet Junior College's exclusive remedies for any damages caused by any product defect or failure arising from the performance or non-performance of any work or service, regardless of the form of action whether in contract, tort, including negligence, strict liability or otherwise, will be:

- 1. For infringement, the remedies stated in Section 7.1.*
- 2. For failure of purchased equipment, the associated telecommunications or computer operating system software during warranty period, or failure of other software of the vendor, the remedies stated in the initial purchase agreement.*
- 3. For delays in the cutover date, the vendor will have no liability unless the cutover date is delayed by more than 30 days by causes not attributable either to Joliet Junior College or to force majeure conditions, in which case, Joliet Junior College will have the right as sole remedy, to cancel the order without incurring cancellation charges.*
- 4. For damages to real or tangible personal property or for bodily injury or death to any person negligently caused by the vendor, the vendor's right to proven damages to property or person.*
- 5. For claims other than those set out above, the vendor's liability will be limited to direct damages which are proven in an amount not to exceed \$100,000.*

Exclusions

Except to the extent provided in Section 8.2, Joliet Junior College will not hold vendor liable for incidental, indirect, special or consequential damages, or for lost profits, savings, or revenues of any kind whether or not vendor has been advised of the possibility of such damages.

Product Changes

Joliet Junior College is willing to establish a Change Control Date (CCD) for products, which is the date after which changes cannot be made to the hardware configuration until installation has been completed. Joliet Junior College will pay the then-current vendor prices for all such requested changes.

Force Majeure

The vendor will have no liability for delays, failure in performance, or damages due to: fire, explosion, lightning, pest damage, power surges or failures, strikes or labor disputes, water, acts of God, the elements, war, civil disturbances, acts of civil or military authorities or the public enemy, inability to secure raw materials, transportation facilities, fuel or energy shortages, acts or omissions of communications carriers, unauthorized

use of the products, or other causes beyond vendor's control whether or not similar to the foregoing.

Subcontracting

Vendor may subcontract the work to be performed, but will retain responsibility for all the work associated with the contract for system installation. The vendor must identify any subcontractors they intend to use in the execution of this contract.

Supplemental Terms and Conditions/Modifications

Any supplemental terms, conditions, modification, or waiver of these terms and conditions must be in writing and signed by the vendor and Joliet Junior College.

VII. Pricing and Financing Options

Pricing

Vendors are asked to guarantee their prices for a period not to exceed 60 days from the date of submission of this RFP to the date of contract award.

Vendors are cautioned to write all prices and descriptions in a legible manner so there will be no doubt as to the intent and scope of the proposal.

The base proposal price shall include all labor and materials required to install the items in accordance with specifications as approved by Joliet Junior College.

Vendors shall complete the following table to include all proposed system components. Price is defined as purchase price; install is the cost of installation; maintenance is the price of maintenance per month for that item; replace is the life of the component in years before the component should be replaced.

Proposed System Components

Qty	Itemized Description	Price	Install	Maint	Replace

Qty	Itemized Description	Price	Install	Maint	Replace
	<i>Sub-total</i>				
	<i>Shipping</i>				
	GRAND TOTAL				

Calculate total cost of ownership for system comprised of above components over 10 year period, including maintenance costs. _____

Vendors shall complete the following table to include all optional system components. Price is defined as purchase price; install is the cost of installation; maintenance is the price of maintenance per month for that item; replace is the life of the component in years before the component should be replaced.

Optional System Components

Qty	Itemized Description	Price	Install	Maint	Replace
	<i>Sub-total</i>				
	<i>Shipping</i>				
	GRAND TOTAL				

Calculate total cost of ownership for above components over 10 year period, including maintenance costs. _____

Financing

Joliet Junior College may choose finance the system covered in this RFP. Please provide background and general information on the financial institution the vendor will recommend as part of the proposal.

List the items from the vendor's proposal that can be financed and those that must be billed separately.

Vendor should complete the following table outlining the type and terms of the lease.

Lease Term	Lease Factor	Implicit %	Monthly Payment	Type
48 Months				
60 Months				

Outline the financing options available.

Explain the credit approval process required by the vendor's financial institution.