



Solicitation Information  
**6 Feb 2012**

**RFP# 7449461**

**TITLE: E Commerce Software, Support and Maintenance - Rhode Island College**

***Submission Deadline: 9 March 2012 @ 10:30 AM (Eastern Time)***

**PRE-BID/ PROPOSAL CONFERENCE: No**

Questions concerning this solicitation may be e-mailed to the Division of Purchases at [questions@purchasing.ri.gov](mailto:questions@purchasing.ri.gov) no later than **21 Feb 2012 @ 12:00 Noon** (Eastern Time). Please submit questions in a Microsoft Word format and reference the LOI # on all correspondence. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

**SURETY REQUIRED: No**

**BOND REQUIRED: No**

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**Vendors must register on-line at the State Purchasing Website at [www.purchasing.state.ri.us](http://www.purchasing.state.ri.us).**

**NOTE TO VENDORS:**

Offers received without the entire completed three-page RIVP Generated Bidder Certification Form attached may result in disqualification.

**THIS PAGE IS NOT A BIDDER CERTIFICATION FORM**

The Rhode Island Department of Administration/Division of Purchases, on behalf of **Rhode Island College** requests letters of interest from qualified vendors to provide an E Commerce Software, Support, and Maintenance System. This solicitation is issued in accordance with the State's General Conditions of Purchase, which is available at [www.purchasing.ri.gov](http://www.purchasing.ri.gov)

#### INSTRUCTIONS AND NOTIFICATIONS TO OFFERORS:

Potential offerors are advised to review all sections of this Request carefully and to follow instructions completely, as failure to make a complete submission as described elsewhere herein may result in rejection of the proposal.

Alternative approaches and/or methodologies to accomplish the desired or intended results of this procurement are solicited. However, proposals which depart from or materially alter the terms, requirements, or scope of work defined by this Request will be rejected as being non-responsive.

All costs associated with developing or submitting a proposal in response to this Request, or to provide oral or written clarification of its content, shall be borne by the offeror. The State assumes no responsibility for these costs.

Proposals are considered to be irrevocable for a period of not less than sixty (60) days following the opening date, and may not be withdrawn, except with the express written permission of the State Purchasing Agent.

All pricing submitted will be considered to be firm and fixed unless otherwise indicated herein.

Proposals misdirected to other State locations or which are otherwise not present in the Office of Purchases at the time of opening for any cause will be determined to be late and will not be considered. Proposals faxed, or emailed, to the Division of Purchases, WILL NOT BE CONSIDERED.

It is intended that an award pursuant to this Request will be made to a prime contractor, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered, but subcontracts are permitted, provided that their use is clearly indicated in the offeror's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.

In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401 222-3040). *This is a requirement only of the selected vendor.*

Bidders are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Proposals will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

Submitters should be aware of the State's MBE requirements, which addresses the State's goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, contact the State MBE Administrator at (401) 574-8253 or [dorinda.keene@doa.ri.gov](mailto:dorinda.keene@doa.ri.gov) Visit the website <http://www.mbe.ri.gov>

Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this LOI.

Equal Employment Opportunity (RIGL 28-5.1) § 28-5.1-1 Declaration of policy. –

(a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090 or via email [raymond1@gw.doa.state.ri.us](mailto:raymond1@gw.doa.state.ri.us)

## **1.0 Introduction**

### **1.1 Background**

Rhode Island College has determined the need to implement a comprehensive commerce management system for enabling a number of RIC's business automation and e-commerce initiatives. This commerce management solution should provide the ability to process online credit card and ACH tuition payments, electronically present student statements, accept student and third-party bill payments, automate tuition payment plan administration, distribute student refunds electronically, establish online storefronts and payment pages, and integrate cashiering functions with our PeopleSoft Campus Solutions system and payment devices. The commerce management system must incorporate a single payment gateway through which all payment transactions are processed. The solution must also include real-time integration with our PeopleSoft Campus Solutions system. The selected vendor will provide an infrastructure for other Board of Governors for Higher Education institutions (URI or CCRI) should they opt for any or all of the services described in the RFP.

Request for Proposal is to enter into a three (3) year agreement to commence on approximately *April 1, 2012 – March 31, 2015– with one additional one (1) year option.*

### **1.2 Summary**

Rhode Island College is seeking proposals from qualified software providers for a turnkey software system that must be hosted, easy to implement, have a single point of support, and keep pace with future commerce opportunities. The solution vendor should offer an ASP licensing agreement. This RFP will be used to acquire the software, implementation services, customer support, and any required hardware devices.

The primary function of this system is to provide an out-of-the-box solution that will allow Rhode Island College to offer campus constituents secure electronic payment processing and the convenience of self-service, online access to campus payment systems. At the same time, it should reduce costs and boost operational efficiencies through business system automation. Further, it should meet today's guidelines and requirements for the safeguarding of sensitive campus information.

### **1.3 Requirements Overview**

The system must provide campus constituents with a secure infrastructure for making online payments. It should automate business systems for electronic bill presentation and payments, tuition payment plan management, student refunds, student deposits, and campus cashiering. The system should facilitate the management and operations of

campus-wide e-commerce. In addition, solutions should be integrated in real time with campus student information and finance systems.

The solution must:

- Be a turnkey installation with configuration and support originating from one source;
- Be easy and fast to install without placing a demand on RIC's resources;
- Integrate in real time with PeopleSoft Campus Solutions; including General Ledger
- Be PCI DSS and PA-DSS certified;
- Be scalable to incorporate future system expansion;
- Be flexible enough to communicate with our bank's recommended credit card processor and to change processors in the future;
- Provide a central payment gateway capable of processing campus wide payments, including transactions made by electronic checks, credit cards, and debit cards;
- Have a proven track record with institutions of Higher Education;
- Provide web-based usage, reporting, and setup.

#### **1.4 Projected Environment**

RIC envisions an environment in which all campus payments are centralized through a single payment engine. The engine must be capable of integrating with user applications available online and to cashiers at the point of payment. The engine must be processor independent and allow RIC to continue its existing banking relationships.

#### **1.5 RFP Evaluation**

An evaluation committee comprised of RIC representatives will evaluate responses and determine the firm(s) best suited to fulfill our requirements. The responses to the RFP will be evaluated using the following criteria including but not limited to:

- Has the vendor been fully certified as PCI compliant? If not, is certification being pursued and what is the status of that certification?
- Can the application integrate with existing College directories to authenticate users when required?
- Is the hosting relationship one which is secure and reliable, but at the same time allows for convenient administrator access?
- Years in Higher Education
- Knowledge of PeopleSoft
- Timeline
- Use within other Higher Education institutions
- Detail response to questions

#### **1.6 RFP Response Guidelines**

- An original Request for Proposal (RFP) plus nine (9) copies shall be mailed or delivered to the following address with the name and number of this RFP# : "E Commerce Software, Support, and Maintenance" clearly marked on each:
- **Proposals received after the closing date/time may not be considered.** In addition to responding to the items specifically requested, Vendor(s) are encouraged

to offer innovative or creative proposals that address the needs of Rhode Island College.

### **1.7 RFP Questions & Communications**

All questions and responses concerning this request for proposal must be directed to:

#### **Pre-Submission Questions & Proposal Submission**

Questions concerning this solicitation may be e-mailed to the Division of Purchases at [questions@purchasing.ri.gov](mailto:questions@purchasing.ri.gov) no later than the date & time indicated on page one of this solicitation. Please submit questions in Microsoft Word format and reference the RFP # on all correspondence. Answers to questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. If computer technical assistance is needed, please call the Help Desk at 401 574-8100.

Send one original, and three copies (all marked with the bid number on the outside of the envelope or Package to the following location:

R.I. Department of Administration  
Division of Purchases, 2<sup>nd</sup> floor  
One Capitol Hill  
Providence, RI 02908-5855

NOTE: Responses received after the above-referenced due date and time will not be considered. Responses misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and will NOT be considered. Proposals faxed to the Division of Purchases will not be considered.

Proposals should include the following:

1. A completed and signed three-page RIVIP Bidder Certification Cover Form, available at [www.purchasing.ri.gov](http://www.purchasing.ri.gov)
2. A Cost Proposal reflecting the hourly rate, or other fee structure, proposed for this scope of services,
3. A Technical Proposal describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.
4. A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at [www.purchasing.ri.gov](http://www.purchasing.ri.gov).
5. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CD / flash drive). Microsoft Word / Excel OR PDF format is preferable. Only 1 electronic copy is requested. This CD or flashdrive should be included in the proposal marked "original".

## **2.0 Electronic Payment Processing**

### **2.1 System Integration Requirements**

- Do you have a real-time interface with PeopleSoft Campus Solutions?
- Has your integration been validated by Oracle on a current release of PeopleSoft Campus Solutions? Please provide your Oracle Datasheet.
- Please describe how payments collected through your solution are posted to our PeopleSoft student system. List the tables and fields that will be accessed or updated in PeopleSoft.
- Is the vendor an Oracle/PeopleSoft Partner? If so, describe your professional association with Oracle and your partnership level.

### **2.2 Credit Card Processing Requirements**

- Does your solution support credit card transaction processing?
- Describe your credit card authorization and settlement process. How long before funds are deposited into our bank account?
- The credit card processing software must be processor independent and work with our existing credit card processor. Please provide a current list of credit card processors with whom your solution is certified to work.
- Describe how your system can be used to refund, reverse, or void credit card transactions processed through your credit card payment engine. Describe how such transactions are reported.

### **2.3 Electronic Check Processing Requirements**

- Does your solution support ACH transaction processing?
- Is your organization a member of NACHA?
- Does your organization employ Accredited ACH Professionals (AAP)?
- Describe your electronic check authorization and settlement process. How long before funds are deposited into our bank account?
- Solution must provide a system that does not require changes to our current banking relationship.
- Describe the process for managing returned ACH transactions.
- Does your system perform a real time verification of routing numbers before payment is accepted?
- Does your system allow for on line ACH payments for both students and departmental customers?

### **2.4 PIN Debit**

- Does your solution support PIN debit transactions for in-person payments?
- Does your solution support PINless debit for online payments?

### **2.5 Administrative Management and Payment Reporting**

- The system must provide real-time payment reporting for all payment transactions. Provide a list and samples of payment reports available to administrators.
- Are payment reports available in Excel/CSV format?

- Describe how administrators can search for specific payment transactions.
- The system must allow multiple administrative users to securely access logging and reporting data. Describe the process for setting up administrative users and access rights.
- Does your system provide edits to help prevent duplicate payments?
- Does your system limit the number of merchant accounts a campus can have?

## **2.6 System Security and Fraud Controls**

- System must support the use of a card verification number (CVV2, CVC2, CID). System must support address verification (AVS).
- Payment system must be PCI compliant.

## **3.0 Electronic Bill Presentment and Payment**

### **3.1 User Authentication Requirements**

- Describe how students are authenticated by your electronic billing system.
- Does your electronic billing system support single sign-on?
- Does your electronic billing system support LDAP?

### **3.2 Bill Loading Requirements**

- Describe the process of transmitting and loading billing statements into your billing software.
- Is there a specific file format required for importing billing statements?
- What is the timeframe for bills to be viewed on line?

### **3.3 Bill Presentation Requirements**

- What bill presentation formats are available? (e.g. text, PDF, HTML)
- Can your billing statement presentation be customized to match our mailed statements?
- Does the bill print support lock-box? If so which format?
- How many bills can be stored in your electronic billing system for each student?
- Describe your system's ability to replace paper billing and the advantages to the school in doing so.
- Can a student still print their bill, if a paper copy is desired?
- Can your system display past term balances in addition to the current term bill?

### **3.4 Authorized Users Requirements**

- Describe how students are able to give third-party users (parents, guardians, employers, etc.) access to their account.
- Are students able to limit access rights for each authorized user? If so, explain.
- Are authorized users given separate passwords or must they use their student's ID and password to access billing and account information?
- Can authorized users maintain separate payment methods (credit cards, checking accounts, etc.) from their students?
- Can authorized users make payments for more than one student at the same time?

- Are students notified if an authorized user makes a payment on their account?
- Is your authorized user functionality compliant with FERPA?

### **3.5 Electronic Notification Requirements**

- How are e-mail addresses loaded and maintained in your electronic billing system for e-mail notifications?
- Do you allow for alternate e-mail addresses to be managed by the student?
- What types of e-mail notifications are available? Provide a list of e-mail notifications delivered by your electronic billing system.
- Does RIC have the ability to edit e-mail notifications to reflect our business policies?
- What is the turnaround time for notifying students of new billing statements?
- How are failed e-mail notifications handled?
- What type of Authorized User electronic notifications do you provide?
- What type of alternative electronic notifications (e.g. text messaging) do you offer?
- Can students receive automatic notifications on mobile devices?
- In addition to automatic messaging, does your system offer the ability to send one-time electronic messages in e-mail and/or text message format?
- Is the electronic bill attached to the e-mail or does the student view the bill in the system?

### **3.6 Real-Time Requirements**

- The electronic billing system must update the student's account in real time. Describe your system's ability to post payment transactions in real time.
- Describe your system's ability to present students and authorized users with the current account balance. Does the balance include estimated financial aid?
- Describe your system's ability to pull current account activity, or activity posted on the student account since the billing date, in real time.
- Does your system have the ability to limit overpayments based on the current account balance?
- Does your system include all payment transactions, regardless of how the payment has been made, or is your electronic billing system limited to only payments made via your software?

### **3.7 Payment Requirements**

- What payment options are available to students through your electronic billing system?
- Students and authorized users must be able to store payment profiles. These profiles must also be accessible to payment plans. Confirm your system has this capability.
- Is your system able to restrict payment if a student has a hold?
- Does your electronic billing system provide users with a payment receipt? Is the receipt available via e-mail?
- Does your electronic billing system support automatic bill payments? Describe the process.
- Does your system allow for line item payments?

- Can students or parents purchase additional items, such as yearbooks, or make donations while making online payments on their accounts?
- Does the system allow students to make payments for multiple terms, or only for a single term?
- Do students receive notification if an authorized user makes a payment on their behalf?

### **3.8 1098-T Statements**

- Can your system present 1098-T statements?
- Can students authorize parents to view their 1098-T statements?
- Can students opt out of receiving paper 1098-T statements and elect to receive only an electronic statement?

### **3.9 Mobile Capability**

- Can students use mobile devices to make payments? View scheduled payments?
- Can students use mobile devices to access account balances and activity?
- Can students receive automatic messages on mobile devices? If Yes, what kind of notifications are available?

### **3.10 System Management Requirements**

- Does your system allow for multiple administrative users with specific access rights?
- Describe the access administrators have to student billing information.
- Does your system provide reporting that shows which students have not logged in and viewed their billing statement? Does your system provide a report that shows a history of how many times a student has logged into your eBill system?
- Describe other reporting capabilities provided by your electronic billing system.

### **3.11 Expansion of eBill System**

- Does your electronic billing system work with payment plan management software or electronic refunding solutions?
- Are electronic billing functions provided entirely by your company or through partnerships? If other companies are involved, please list and describe their roles.

## **4.0 Payment Plan Management System**

### **4.1 Student Authentication Requirements**

- Is your payment plan management system integrated with an electronic billing system? Describe how students are authenticated by your payment plan management system.

### **4.2 Student Self-Service Requirements**

- Describe the student enrollment process in a tuition payment plan.
- What payment methods are available to students and authorized users within your payment plan management system?
- What are the fees associated with your payment plan?

- Does your system give students the option to set up scheduled payments in order to automatically pay plan installments?
- Are payments made via the payment plan management system reflected on the student account in real time? Please explain how.
- Can students use mobile devices to make payments and/or view payment plan installments?

#### **4.3 Plan Administration Requirements**

- Describe the process for administrators to create and manage tuition payment plans. Include available options for setting up installments, due dates, and payment plan fees.
- Will the system allow RIC to set up different types of plans to meet the needs of different students? Please describe.
- How does your payment plan system account for charges and credits eligible for a payment plan?
- The system must allow for financial aid to be included in the payment plan. Describe how financial aid is used in the plan calculation.
- Payment plan management system must automatically recalculate installments based upon changes in enrollment status or new charges and credits on the student's account. Describe this functionality.
- How often does recalculation run?
- How are charges associated with your plan, such as the registration fee or late fees, applied to the student account?
- Funds collected through payment plan management software, including the plan enrollment fee, must be processed through a central payment gateway and deposited directly into RIC's bank account. Please confirm this functionality is available.
- Does the system have the ability to only include a percent of charges after plan enrollment?
- Does your system allow for extended payment plans that cover the entire school year?
- Can students be automatically migrated from one plan to another? For example, if a student is enrolled in an Estimated Amounts plan, can they be automatically switched to a real-time plan?

#### **4.4 Administrative Access to Student Payment Plan Requirements**

- Administrators must have the ability to enroll students in a payment plan.
- Do administrators have access to signed payment plan enrollment agreements?

#### **4.5 Reporting Requirements**

- Describe and include examples of enrollment reports available to plan administrators.
- Describe and include examples of revenue reports available to plan administrators.
- Describe and include examples of delinquency and/or payment plan aging reports. What other functions are included to help manage/limit delinquency?

## **5.0 Electronic Refunding System**

### **5.1 Electronic Refunding Requirements**

- Explain what your product considers a 'refund'. For example, does your solution process credit card refunds for dropped classes, etc. as well as refunds of excess Financial Aid?
- Describe all refund methods available with your system?
- Does the system allow for the option to do batch refunding back to credit cards?
- Does your system interact with our PeopleSoft system or must the school send electronic files containing information on pending refunds? If the solution interacts with PeopleSoft, does it do so in real time?
- Describe the general process flow for refunding students. Include the following:
  - How can RIC create a refund run using the PeopleSoft system to determine which students are eligible for an electronic refund?
  - What steps are required in order to generate the refunds?
  - How does your system update our PeopleSoft system to reflect the fact that an electronic deposit has been made?
- Does the vendor store the students' refund profiles or are refund profiles created and maintained by the students?
- If refund profiles are created and maintained by the students, how are students notified to create refund profiles?
- Does your system support ACH pre-notes? Are students notified if the account is not valid?
- Are students notified after a deposit is made to their account?
- Do students have access to their electronic refund history?
- Can students withdraw their monies from any ATM?
- What fees are associated when a student uses any ATM to withdraw money?
- Describe reports available to campus staff.
- Can a student use their existing banking relationship?
- How does your solution comply with regulations such as PA-DSS, Red Flags, and Title IV?

## **6.0 Third-Party Contract Payments**

- Can your system accept third-party contract payments? If so, please give an overview of your solution.
- Which users will have access to view and pay the student's account? How is this access granted?
- What information regarding the student's account will the sponsor be able to view?
- Describe your solution's bill presentment capability.
- What payment methods are accepted (e.g. credit card, ACH, etc.)?
- How can payments be applied (e.g. account, contract, student, etc.)?
- How does your system facilitate communication between the various parties (the student, the sponsor, and the school)?
- What reports are available for reconciliation purposes?

## **7.0 Cashiering System Requirements**

### **7.1 Connectivity**

- The system must be able to use parameters of RIC's host systems for payment application.

### **7.2 Physical System Requirements**

- The system must include all software and hardware components necessary for payment functions at the cashier's window for all types of payment transactions. The system software must be integrated in real time with RIC's PeopleSoft Campus Solutions system. Please provide a basic overview of your cashiering solution.
- Describe cashiering hardware options.
- Describe your system's ability to support a multi-site campus environment.

### **7.3 Student Authentication Requirements**

- Describe the process for cashiers to access a student account. Include an explanation of how a student's campus ID card can be used to initiate a cashiering transaction.
- Describe what student information is retrieved, including name, address, hold information, etc.

### **7.4 Credit Card Processing Requirements**

- The cashiering system must have a customer-facing terminal that is capable of displaying pertinent student information such as account balance, name, student ID number, amount due, and other relevant information. This terminal must also allow a student to swipe their credit card or student ID card without handing it to the cashier. Does your system support this requirement?
- Describe the process for accepting a credit card payment in which the card is physically swiped.
- Describe the process for accepting a credit card payment without the credit card swipe functionality.
- What are your processing fees?
- If proposed system issues a card to students, will a fee be charged to the student if it is used to pay tuition to RIC?
- When a card is swiped through a POS terminal, does that place the Cashiering station within the PCI DSS scope? If no, please explain how the Cashiering station can be kept out of the PCI DSS scope.

### **7.5 Check Conversion Requirements**

- Describe the process for converting a paper check presented in person into an ACH transaction. Is the system NACHA compliant?
- Describe the process for converting a mailed-in check payment to an ACH transaction. Is the system NACHA compliant?
- Describe the process for converting a phoned-in payment to an ACH transaction. Is the system NACHA compliant?

- The system must have check scanning capability. In addition, the system must provide the ability to view scanned check images. This information will be used for audit control and dispute resolution procedures. Describe how your system supports this functionality.

### **7.6 Transaction Reporting Requirements**

- Does your cashiering system include a transaction journal that shows all user activity? This journal must be archived for audit purposes.
- Describe your system's ability to track financial transactions (monies collected and monies disbursed) for each individual cashier, creating an audit trail to be used by system administrators or supervisors.

### **7.7 Payment Processing Requirements**

- The system must have the ability to accept multiple tender types for a single transaction. Each tender type must be listed individually on the receipt.
- Cashiers must be able to accept payment for multiple target accounts in a single customer session. For example, a cashier should be able to take payment for a student's fall tuition and parking fine in a single customer session. This transaction must be reflected in a single customer receipt.

### **7.8 Payment Receipt Requirements**

- The system must have the capability to generate a receipt that includes: cashier number, date, student ID, payment type, account code, transaction number, and amount paid. Describe your cashiering system's receipt generating functionality.
- How many receipts can be printed during a single transaction, i.e., can the user request multiple copies of receipt at printing? Please explain.
- Does your system allow for reprinting receipts? Please explain.
- Can a receipt be e-mailed to the customer?

### **7.9 Other Cashiering Requirements**

- The system must be capable of supporting drawer replenishment with the option of requiring supervisor authorization for this function. Describe how this is accomplished.
- The system must be capable of supporting deposits made by campus departments. Describe how this is accomplished.
- The system must allow for cashiers to post payments from third parties (for example, corporations paying tuition on behalf of their employees). Explain how this is accomplished.

### **7.10 Drawer Management Requirements**

- The solution will optionally have integrated "physical" drawers available.
- "Electronic" cashier drawer must be portable (i.e., cashier should be able to take their "physical" drawer to a different cashier station and log into their "electronic drawer" at that station).
- Describe how the system maintains information about the cashier's drawer, as well as its ability to close and balance the drawer when a cashier logs off.

- The cashiering system must save the values in the currency worksheet when a cashier closes and balances their drawer. This will assist supervisors in the audit control process.
- Supervisor must have drawer override capability. Please describe.

#### **7.11 Business Day Requirement**

- The cashiering system must be able to incorporate the campus's existing business day rules and must post payments to the appropriate business day. Please describe how this is accomplished.

#### **7.12 User Administration Requirement**

- The cashiering system must allow for the ability to assign roles to different staff members, giving each user different roles, responsibilities, and rights to the system. Describe the user roles available in your cashiering system.

#### **7.13 Power Outage/System Availability Requirement**

- The system must be capable of independent operation off-line from the server and/or host. Please explain the offline operation.

#### **7.14 Student Deposits**

- The system must be capable of applying student deposits such as tuition and housing deposits using the system settings in RIC's host system.

#### **7.15 Commerce Requirements**

- The system must be designed to allow multiple merchants (i.e. Departments) to accept payments. (Examples: Alumni, Athletics, etc.)
- The solution must include a shopping cart and a checkout page.
- The solution should allow for tracking of inventory.
- Describe the process of selling merchandise, including adding the desired products to the shopping cart, and subsequent authorization and payment. Is the authorization process transparent to the cashier?

### **8.0 Campuswide Online eCommerce**

#### **8.1 Centralized Online Stores**

- The system must provide a centralized storefront application with consolidated payments into a secure and PCI/PA-DSS certified enterprise payment gateway.
- The system must be designed to allow multiple merchants (i.e. Departments) to operate and run stores and accept payments. (Examples: Alumni, Athletics, Parking, Continuing Education, Admissions, Henry Barnard School, etc.)
- The e-Store capability must include a home page, product pages, a shopping cart, a checkout page, and order status information.
- Does your system have the ability to display stores and/or merchandise items by category?

- Describe the extent to which the solution can be made to be consistent with the RIC's existing branding, both on the home page and on a store-by-store basis.
- Describe the process for setting up campus stores. Can non-technical users set up storefronts without extensive vendor support?
- The online storefronts must allow for product definitions to be imported, as well as manually entered, by non-technical users.
- Can products be automatically enabled at a designated date/time?
- Does your solution allow customers to register and establish profiles with stored payment methods, addresses, and order history?
- The online storefronts should allow for external data to be collected with each product purchased (such as size, color, etc.).
- Does the online storefront allow for tracking of inventory?
- Describe your solution's order fulfillment process.
- Describe the process of shopping, including adding the desired products to the shopping cart, and subsequent authorization and payment. Is the authorization process transparent to the customer?
- Does your system provide confirmation or notification when a payment has been made? How is this confirmation sent? Via e-mail? Text message?
- Does your system include QR Code capability?
- Does your system include a Preview mode to allow you to create stores on your production system?
- Can your system be configured to request donations from shoppers during checkout?

## **8.2 Online Donations**

- Does your solution accept donations?
- Can the system be configured to accept donations as recurring payments, with specified beginning and ending dates?
- Does the system allow RIC to change default verbiage to language more appropriate to donations (e.g. "Additional Gifts" instead of "Continue Shopping")?

## **8.3 Online Registration**

- Does your system manage event registration?
- Can the system accept multiple registrations?
- Can the system accept additional information about the registrant (name, address, etc.?)
- Does the system provide e-mail confirmation to the customer after registration? Text message confirmation?

## **8.4 Integration Requirements**

- The system must be capable of providing payment functionality to existing campus applications. Describe your solution's ability to meet this campus requirement.
- Can the system integrate with other third-party applications that provide services for Higher Education? If so, with which systems do you offer integration?
- When integrating with campus and/or third-party applications, can your solution be configured to accept recurring payments?

## **8.5 Mobile Capabilities**

- Can campus customers access online stores from their mobile devices?
- Can mobile shoppers purchase from more than one online store with a single checkout?
- Can shoppers access their stored payment profiles from their mobile devices?
- Can campus donors make donations from their mobile devices?
- Can campus customers use their mobile devices to register for events or enroll in Continuing Education classes?

## **9.0 Centralized Controls and Management**

### **9.1 Centralized Management System**

- The system must provide a centralized view of system-wide transactions in order to facilitate management of commerce operations. Does your system provide this capability? If so, please describe.
- Can users access this information via mobile devices?
- Can RIC choose whether to include one or more selected campuses or all campuses in the display?
- The system must provide a central view of alerts to notify administrators of actions required throughout commerce applications. Can these alerts be received on mobile devices?

### **9.2 User Management**

- The System must provide a single login for all administrative applications with a history of the user's activity.
- Must have customizable password policy to enforce strong passwords and user role management.

### **9.3 Central Support**

- Does the system provide central access to training and educational materials?
- Does the system provide a central resource center for product and industry information?
- Does the system provide a central forum to share questions, ideas, and best practices with other institutions?

## **10.0 Security**

### **10.1 PCI Compliance**

- The system must be hosted in a PCI DSS certified data center.
- The hosting facility must strictly control physical and electronic access.
- All payment applications provided in vendor's solution must be certified PA-DSS compliant.
- Are the data center and data center operations audited for PCI DSS compliance annually by an independent security firm?

- Is each new release of the vendor's software audited for PA-DSS compliance by an independent security firm?

## **10.2 Hosting Services**

- The system must have both a Production and a Test environment.
- Operations must be monitored 24 x 7.
- Vendor must guarantee 99% up time.
- The system must provide hardware configurations and redundancy to protect against equipment failures.

## **11.0 General Ledger**

- Explain the process to interface transaction files from cashing to PeopleSoft General Ledger.
- Describe reports for balancing and audit proposes.

## **12.0 Payroll**

- Does your system offer a means to pay institutional employees, including students? Please describe.

## **13.0 Customer Service**

- Describe your customer support structure.
- Describe your training procedures.
- Is online Help included with your system?

## **14.0 Interaction with Other Customers**

- Does a customer advisory council exist?
- How is product information shared with customers?
- Is there a User Group? User conference?

## **15.0 Company Information**

- Please give a short history of your company to demonstrate your experience in providing software solutions to Higher Education.
- Does your company utilize sub-contractors? If so, list them and describe the role each will play in providing services under this contract.
- Please provide sufficient information to demonstrate the financial security and stability of your company.
- Describe your company's position and participation in the industry as a whole. For example, of what organizations are you a member? How do you help to educate your customers on regulations and other issues within the industry?

## 16.0 Evaluation for Final Consideration

- A Selection Committee will evaluate submitted proposals on the basis of the above criteria items. Vendors may be invited to appear before the Committee for in-person presentations. The committee will forward a recommendation (s) to the Director of Administration who will make the final award decision.
- Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all responses, and to award in its best interest.
- Responses found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. The State reserves the right to reject any or all responses submitted and to waive any informality in any vendor's submission.

### 16.1 Evaluation Factors

- **Project Approach & Understanding of Scope (Maximum of 50 points)**  
The vendor shall demonstrate in the proposal an understanding of the project and provide a description as to how the project will be managed and completed. Include the names and resumes of all key personnel who would work on project.
- **Experience in installing and maintaining a commerce management system in Higher Education Institution (Maximum of 25 points)**  
The Vendor will be evaluated on their demonstrated experience in installing and maintaining the system in other higher education institution. This experience should include at least five (5) similar projects, verified by references.
- **Fees (Maximum of 25 Cost points)**  
The fee will be evaluated along with the above items as a factor in selection. Fee response should include, but not limited to, per-transaction fees, fees for processing payments, refunds, deposits, returns, statement generation, or file transfers. Explain whether each fee is an annual fee or a one-time charge. Also include annual maintenance cost.

A Selection Committee will evaluate submitted proposals on the basis of the above criteria items. Consultant Teams may be invited to appear before the Committee for in-person presentations. The Committee will then make a qualifications based recommendation for final selection to the Rhode Island State Purchasing Agent, or her designee, who will make the final award decision.

Notwithstanding the above, the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all responses, and to award in its best interest.

Responses found to be technically or substantially non-responsive at any point in the evaluation process will be rejected and not considered further. The State reserves the right to reject any or all responses submitted and to waive any informalities in any vendor's submission.