



**REQUEST FOR PROPOSAL
No. WY163571P**

Graduate Education Toolkit

PROPOSAL DUE DATE AND TIME:
March 29, 2013 (2:00 PM, PST)

OSU Procurement and Contract Services Offices are open from 8:00 am – 12:00 noon and 1:00 pm – 5:00 pm.
Offices are closed during the 12:00 noon – 1:00 pm lunch hour.

SUBMITTAL LOCATION:

Oregon State University
Procurement and Contract Services
644 SW 13th Avenue
Corvallis, Oregon 97333

1.0 GENERAL

1.01 SCHEDULE OF EVENTS:

- Request for Proposal Issue Date..... March 15, 2013
- Deadline for Request for Clarification or Change..... March 22, 2013 (10:00 am, PST)
- Proposal Due Date and Time..... March 29, 2013 (2:00 pm, PST)

This Schedule of Events is subject to change. Any changes will be made through the issuance of Written Addenda.

1.02 PRE-PROPOSAL CONFERENCE:

A Pre-Proposal Conference will not be held.

1.03 ISSUING OFFICE:

The Procurement and Contract Services (PaCS) department of Oregon State University (OSU) is the issuing office and is the sole point of contact for this Request for Proposal. Address all concerns or questions regarding this Request for Proposal to the Administrative Contact identified below:

1.04 ADMINISTRATIVE CONTACT:

Name: Will Young
Title: Procurement Analyst
Telephone: (541) 737-3572
Fax: (541) 737-5546
E-Mail: will.young@oregonstate.edu

1.05 DEFINITIONS:

As used in this Request for Proposal, the terms set forth below are defined as follows:

- a. "Addenda" means an addition to, deletion from, a material change in, or general interest explanation of the Request for Proposal.
- b. "Exhibits" means those documents which are attached to and incorporated as part of the Request for Proposal.
- c. "Proposal" means an offer, binding on the Proposer and submitted in response to a Request for Proposal.
- d. "Proposer" or "Integrator" means an entity that submits a Proposal in response to a Request for Proposal.
- e. "Proposal Due Date and Time" means the date and time specified in the Request for Proposal as the deadline for submitting Proposals.
- f. "Request for Proposal" (RFP) means a Solicitation Document to obtain Written, competitive Proposals to be used as a basis for making an acquisition or entering into a Contract when price will not necessarily be the predominant award criteria.
- g. "Responsible" means an entity that demonstrates their ability to perform satisfactorily under a Contract by meeting the applicable standards of responsibility outlined in OAR 580-061-0130.
- h. "Responsive" means a Proposal that has substantially complied in all material respects with the criteria outlined in the Request for Proposal.
- i. "Written or Writing" means letters, characters, and symbols inscribed on paper by hand, print, type, or other method of impression intended to represent or convey particular ideas or meanings.

2.0 INTRODUCTION AND BACKGROUND

2.01 INTRODUCTION

Oregon State University (OSU) Procurement and Contract Services (PaCS) is seeking responsive responsible proposers to submit proposals for the development and integration of a single Salesforce Org for the specific purpose of Graduate level admissions, the intermediate purpose of supporting the Graduate student life cycle and the long term purpose of supporting a wide variety of functions across Oregon State University.

2.02 BACKGROUND:

Oregon State University offers a diverse graduate curriculum, both on campus and via distance courses, that leads to more than 70 different graduate degrees. The Graduate School works with approximately 3,700 students and more than 2,000 faculty members across the other 12 OSU Colleges to recruit and admit graduate students, ensure academic progress and success, as well as to manage the necessary business functions related to graduate education. For example, approximately 6,000 graduate level applications for admission are processed each year with input from 400 faculty admission committee members and administrators. Over the next several years, the graduate student population is projected to grow substantially to support OSU's strategic goals; successfully managing our growth, as well as educational and research outcomes, are an institutional priority. To meet this challenge, OSU requires a flexible and robust technology infrastructure to manage business processes and support the analytics needed to measure our progress.

The Graduate School currently manages and reports on applicant, student and faculty information using a wide variety of tools, including Ellucian Banner, Banner Self-Service, Hummingbird BI, NOLIJ document management, MySQL databases and an Access database. Over the next several years, the graduate student population is projected to grow substantially to support OSU's strategic goals for the next decade. Our current technology structure does not adequately meet current needs and cannot meet projected needs.

The Graduate School wishes to develop a Salesforce based solution to address data needs for all areas of operations: admissions, faculty/student relationships, grants & scholarships, and post degree tracking. A successful deployment of the proposed Graduate Education Toolkit (GET) will be used University-wide. This effort has been segmented into several phases, and the effort described in this RFP is only for the first phase of the Graduate Education Toolkit project. It includes the Graduate admissions application, robust security architecture (supporting individual program customization and future org integrations), integration with existing systems (including Banner, Nolij, Microsoft Exchange and others) and theme customization. At OSU's discretion the successful Proposer may also be awarded future phases of the Graduate Education Toolkit project.

The Proposer we are seeking should have significant successfully completed Higher Education projects, be willing to develop the Salesforce Org collaboratively with Graduate School and OSU IT staff, provide some training, post-production deployment technical support and commit to a deployment date of September 1, 2013. Proposals should be based on the project scope in Exhibit D. However, OSU will expect a certain amount of flexibility during the course of the project development such that the Proposer will be willing to hand off specific development efforts (such as integrating a particular 3rd party app, for example) to OSU, as is deemed by the Proposer and OSU to be appropriate, reasonable and would not negatively impact the project timeline, quality or budget.

Proposers should be guided by the following key OSU business drivers and infrastructure requirements. Responses should tie these functions together into a cohesive and integrated ecology.

Deployment and success factors:

- Ensure successful adoption and use through end user testing, effective training and documentation
- Improve turnaround time for application review process
- Provide near real time application status visibility to applicants

- Allow Academic Program Administrators the ability to customize their own Applications
- Allow Academic Program Administrators the ability to create/manage program defined admissions review committees and workflows

System components:

- Replace existing website for submitting online Graduate School applications
- Preserve current Applications in-process for Applicants
- Provide reference to historical Applications of Applicants for Program review
- Replace existing Letter of Reference system
- Preserve current Letters in-process for References
- Replace existing system for ordering Applicant letters
- Enable Group composition and Approval routing of Applications for Academic Programs
- Provide inherent queries, segmentation, and reporting of Applications

Local integration requirements:

- Provide SSO capability for OSU staff
- Maintain integration with existing Banner ERP system
- Maintain integration with existing TouchNet payment processor
- Maintain integration with existing Noli content management system
- Enable additional process for PDF translation of Documents prior to storing in Noli
- Provide survey capabilities via Qualtrics for OSU staff

2.03 OREGON STATE UNIVERSITY:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is a member of the Oregon University System and one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only Oregon institution to hold the Carnegie Foundation's top ranking for research universities, recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in almost every one of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, masters and doctoral degrees through 12 academic colleges enrolling more than 20,000 students from every county in Oregon, every state in the country and more than 90 nations.

3.0 REQUIREMENTS

3.01 REQUIREMENTS:

Proposers should offer Proposals that are in accordance with the project scope described in Exhibit D.

3.02 TERMS AND CONDITIONS:

OSU's terms and conditions governing the purchase resulting from this RFP are included at Exhibit A. OSU will negotiate the resulting Contract to be consistent with the solution chosen.

4.0 PROPOSER QUALIFICATIONS

4.01 MINIMUM QUALIFICATIONS:

In order to qualify as a Responsive Proposer, the Proposer needs to meet the minimum qualifications below. After verification that the minimum qualifications have been met, OSU will award points based on the level of the Proposer's qualifications.

- a. Prior experience successfully managing and implementing Salesforce solutions for higher education setting.

4.02 PREFERRED QUALIFICATIONS:

OSU will award additional points for Proposers able to meet the preferred qualifications below.

- a. Prior experience delivering Salesforce solutions to OSU or the OUS system.
- b. Prior experience integrating Salesforce with Ellucian Banner using Cast Iron (or similar product).
- c. Prior experience integrating Salesforce with NOLIJ.

5.0 REQUIRED SUBMITTALS

5.01 QUANTITY OF PROPOSAL:

Submit one (1) original Proposal and five duplicate copies. Mark original Proposal as "ORIGINAL". Original should contain original signatures on any pages where a signature is required. Proposals should contain the submittals listed in this section below:

5.02 REQUIRED SUBMITTALS:

It is the Proposer's sole responsibility to submit information in fulfillment of the requirements of this Request for Proposal. If pertinent information or required submittals are not included within the Proposal, it may cause the Proposal to be rejected or have an adverse impact on evaluation.

Proposers should submit the following information:

Note: All submissions must take into account project responsibilities as identified in Exhibit D.

Qualifications

- Detailed information about how the Proposer meets the minimum and preferred qualifications detailed in section 4.

Experience and methodology

- Descriptions (including well defined project development methodology, scope, duration and outcome) and references for projects on which the staff dedicated to this project made significant contributions - preferably from both OSU or the OUS system and non-OUS system universities.
- Descriptions of experience and process with change management in relation to higher education implementations. Note: this is referring to Enterprise change management – not managing changes to project scope. Specifically we are looking for your plan to help users learn/adopt new systems during development as well as post deployment.
- Descriptions of experience, practice and methods in relation to the following:
 - Project management (in general and related to blended teams).
 - Requirements elicitation
 - Information architecture design process in relation to multiple system integration.
 - Development and deployment process (e.g. specifications of prototyping methodology)
 - Data migration process.
 - Testing
 - Training

Key Persons

- A list and role of project team members that will be dedicated to the project (“Key Persons”). For example we will be looking for the Project Manager, Salesforce Specialist, Architecture Specialist and Business/Change Management Specialist roles. Must include resumes detailing length of time with company and project participation list including role and project outcome (specifically state if project completed within scope, cost, schedule)
- A signed statement that the identified Key Persons will remain participating members for the duration of Phase I of the project (notwithstanding unanticipated life events – in which case an OSU approved substitute with equivalent skill may be used). Please describe options for recalling desired key people for subsequent phases.

Project Assessment

- Detailed project management plan including progress reports and their form, meeting schedule, etc.
- Description of Development Plan
- Detailed description of Change Management Plan
- Description of Business Deployment Plan including user training
- Description of Change Management including bugs/problems/defects and schedule
- Milestone schedule.
- Description of all assumptions
- Description of risks (including but not limited to those associated with a blended project team, late completion, over budget, scope creep, etc.) and how risks will be mitigated.
- Description of out of scope items
- Description of specific project conditions
- Description of Salesforce architecture design
- Identify Salesforce licenses (quantity and type) that will be needed for this project. **Note: OSU will purchase licensing direct from Salesforce.**
- An assessment of security architecture
- An assessment of third-party applications proposed for project
- Description of response time/support levels pre and post deployment
- Provide details of documentation deliverables. The following is an example and not a complete list (for example another deployment document should include user engagement & training)

Phase	Deliverable	Description
Project Management	Project Plan	Deliverable / milestone based project plan detailing the key tasks and dates
	Team Roster	List of team members with contact info, roles, and location
	Kick Off Presentation	Presentation for kick off meeting containing background info, objectives, high level timeline, risks, etc.
	Burn Report	Report of Actual to Forecast per the timeline
	Status Reports / Presentations	Recurring status report / presentations to key stakeholders / project teams
	RAID List	Method / list of tracking Risks, Actions, Issues, and Decisions (ex. Project Force)
Requirements & Design	Requirements Document and Functional Design Document	Deliverable documents user requirements and design components such as: <ul style="list-style-type: none"> - Use Cases (ex. As Is / To Be process flows) - Business Requirements - Design Elements & Functional Specifications ex (Screen flow, screen shots, workflow, triggers, etc) - System Requirements - Security & Role Hierarchy (access)
	Data Model	Diagram depicting the data model for the salesforce.com org, typically a Visio diagram. <ul style="list-style-type: none"> - Entity Relationship Diagram – Standard and Custom Objects in Salesforce.com with the associated relationships per the scope of the project.
Build & Test	Technical Specifications	Technical document detailing key technical items such as Apex Triggers, VisualForce pages, etc.
Deployment	Deployment Plan	Deployment / implementation plan for configuration and development to be moved from Sandbox to Production environment.

Project Estimates

- Complete Exhibit E, Itemized Engagement Time and Cost Estimate.

Terms, Certifications and References

- Proposer's contract form. Contract will be negotiated to be consistent with OSU's terms and conditions detailed in section 3.
- Exhibit B, Certifications, fully completed.
- Exhibit C, References, fully completed. Please be sure to include references for projects on which the staff dedicated to this project made significant contributions.

6.0 EVALUATION AND AWARD

6.01 EVALUATION:

The stages of review and evaluation are as follows:

a. **Determination of Responsiveness:**

OSU will first review all Proposals to determine Responsiveness. Proposals that do not comply with the instructions or are incomplete may be deemed non-Responsive. Written notice will be sent to Proposers whose Proposal is deemed non-Responsive identifying the reason. A proposer has the right to appeal the decision pursuant to OAR 580-061-130(5)(a).

b. **First Stage Evaluation:**

Those Proposals determined to be Responsive will be evaluated using the required submittals. Proposals will be scored based on the evaluation criteria listed below in section 6.03. Scores will be used to determine Proposer's within a competitive range. The competitive range will be made of Proposers whose individual scores, when viewed together, form a group of the highest ranked Proposers above a natural break in the scores.

OSU may award after the first stage evaluation to the highest ranked Proposer without moving on to the second stage evaluation. If this option is selected, written notice of intent to award the Contract to the highest ranked Proposer will be provided to all Responsive Proposers.

c. **Second Stage Evaluation:**

If award is not made after the first stage evaluation, OSU may choose any of the following methods in which to proceed:

- i. Issue a Written invitation to Proposers within the competitive range requesting an interview, presentation, site visit or any other evaluative method that is relevant to the goods or services solicited in the Request for Proposal. Written invitations will contain the evaluation criteria and scoring that will be used by the evaluation committee.
- ii. Engage in oral or written discussions with and receive best and final Proposals from all Proposers in the Competitive Range or all Proposers submitting Responsive Proposals. Discussions may be conducted for the following purposes:
 - Informing Proposers of deficiencies in their initial Proposals;
 - Notifying Proposers of parts of their Proposals for which OSU would like additional information; or

- Otherwise allowing Proposers to develop revised Proposals that will allow OSU to obtain the best Proposal based on the requirements set forth in this Request for Proposal.

The conditions, terms, or price of the Proposal may be altered or otherwise changed during the course of the discussions provided the changes are within the scope of the Request for Proposal. Best and final Proposals will be scored based on the evaluation criteria listed below in section 6.03.

Points awarded in the first stage evaluation will not be carried to the second stage evaluation. Contract will be awarded to the Proposer who in OSU's opinion, best meets the requirements and qualifications of the RFP and OSU's needs.

d. Additional Stages of Evaluation:

If after completion of the second stage of evaluation, an award is not made, OSU may add another stage of evaluation using any of the methods outlined in the second stage evaluation above.

6.02 NEGOTIATIONS:

OSU may commence serial negotiations with the highest-ranked Proposer or commence simultaneous negotiations with all eligible Proposers. OSU may negotiate:

- a. The statement of work;
- b. The Contract price as it is affected by negotiating the statement of work; and
- c. Any other terms and conditions determined by OSU in its sole discretion to be reasonably related to those expressly authorized for negotiation. Accordingly, Proposers will not submit and OSU will not accept for negotiation, any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation.

Terms and conditions within the sample contract that are unrelated to the statement of work or Contract price may be negotiated after award, but before execution of the Contract.

6.03 EVALUATION CRITERIA:

Points will be given in each criteria and a total score will be determined. The maximum points available for each criterion are identified below.

<u>Evaluation Criteria</u>	<u>Points</u>
Proposers response to Project Assessment	20
Project approach and methodology	15
Ability to commit to full implementation prior to September 1, 2013	15
Projected cost estimates	15
Relevant experience and qualifications of Key Persons	15
Meeting of preferred vendor qualifications	10
Relevance and quality of company prior references & projects	10
Total	100

6.04 INVESTIGATION OF REFERENCES:

OSU reserves the right to investigate and to consider the references and the past performance of any Proposer with respect to such things as its performance or provision of similar goods or services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers. OSU further reserves the right to consider past performance, historical information and facts, whether gained from the Proposal, Proposer interviews, references, OSU or any other source in the evaluation process. OSU may postpone the award or execution of the Contract after the announcement of the notice of intent to award in order to complete its investigation.

7.0 INSTRUCTIONS TO PROPOSERS

7.01 APPLICABLE STATUTES AND RULES:

This RFP is subject to the applicable provisions and requirements of the Oregon Revised Statutes, Oregon Administrative Rules, and OSU Policies and Procedures.

7.02 REQUEST FOR CLARIFICATION OR CHANGE:

Requests for clarification or change of the Request for Proposal must be in Writing and received by the Administrative Contact no later than the Deadline for Request for Clarification or Change as specified in the Schedule of Events. Such requests for clarification or change must include the reason for the Proposer's request. OSU will consider all timely requests and, if acceptable to OSU, amend the Request for Proposal by issuing an Addendum. Envelopes, e-mails or faxes containing requests should be clearly marked as a Request for Clarification or Change and include the RFP Number and Title.

7.03 ADDENDA:

Only documents issued as Written Addenda by PaCS serve to change the Request for Proposal in any way. No other direction received by the Proposer, written or verbal, serves to change the Request for Proposal. PaCS will notify potential Proposers through publication of the Addenda on the OUS procurement website. If you have received a Request for Proposal you should consult the OUS procurement website, prior to Proposal submittal, to assure that you have not missed any Addenda. Proposers are not required to return Addenda with their Proposal. However, Proposers are responsible for obtaining and incorporating any changes made by the Addendum into their Proposal. Failure to do so may, in effect, make the Proposal non-Responsive, which may cause the Proposal to be rejected.

7.04 PREPARATION AND SIGNATURE:

All Required Submittals must be Written or prepared in ink and signed in ink by an authorized representative with authority to bind the Proposer. Signature certifies that the Proposer has read, fully understands, and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal.

7.05 PUBLIC RECORD:

Upon completion of the Request for Proposal process, information in your Proposal will become subject records under the Oregon Public Records Law. Only those items considered a "trade secret" under ORS 192.501(2), may be exempt from disclosure. If a Proposal contains what the Proposer considers a "trade secret" the Proposer must mark each sheet of information as such. Only bona fide trade secrets may be exempt and only if public interest does not require disclosure.

7.06 SUBMISSION:

Proposals must be submitted in a sealed envelope and be delivered to the submittal location listed on the Request for Proposal cover sheet no later than the Proposal Due Date and Time. Proposer must specify on the outside of the envelope the Request for Proposal number, the Request for Proposal title and the Proposal Due Date and Time. **E-MAIL OR FACSIMILE PROPOSALS WILL NOT BE ACCEPTED.**

7.07 MODIFICATION:

Prior to submittal, Proposers should initial modifications or erasures in ink by the person signing the Proposal. After submittal but prior to the Proposal Due Date and Time, Proposals may be modified by submitting a Written notice indicating the modifications and a statement that the modification amends and supersedes the prior Proposal. After the Proposal Due Date and Time, Proposers may not modify their Proposal.

7.08 WITHDRAWALS:

A Proposer may withdraw their Proposal by submitting a Written notice to the Administrative Contact identified in this Request for Proposal prior to the Proposal Due Date and Time. The Written notice must be on the

Proposer's letterhead and signed by an authorized representative of the Proposer. The Proposer, or authorized representative of the Proposer, may also withdraw their Proposal in person prior to the Proposal Due Date and Time, upon presentation of appropriate identification and evidence of authority to withdraw the Proposal satisfactory to OSU.

7.09 LATE SUBMITTALS:

Proposals and Written notices of modification or withdrawal must be received no later than the Proposal Due Date and Time. OSU may not accept or consider late Proposals, modifications, or withdrawals except as permitted in OAR 580-061-0120.

7.10 PROPOSAL OPENING:

Proposals will be opened immediately following the Proposal Due Date and Time at the Submittal Location. Proposer may attend the Proposal opening. Only the names of the Proposers submitting Proposals will be announced. No other information regarding the content of the Proposals will be available.

7.11 PROPOSALS ARE OFFERS:

The Proposal is the Proposer's offer to enter into a Contract pursuant to the terms and conditions specified in the Request for Proposal, its Exhibits, and Addenda. The offer is binding on the Proposer for one hundred twenty (120) days. OSU's award of the Contract constitutes acceptance of the offer and binds the Proposer. The Proposal must be a complete offer and fully Responsive to the Request for Proposal.

7.12 CONTINGENT PROPOSALS:

Proposer shall not make its Proposal contingent upon OSU's acceptance of specifications or contract terms that conflict with or are in addition to those required by the Request for Proposal, its Exhibits, or Addenda.

7.13 RIGHT TO REJECT:

OSU may reject, in whole or in part, any Proposal not in compliance with the Request for Proposal, Exhibits, or Addenda, if upon OSU's Written finding that it is in the public interest to do so. OSU may reject all Proposals for good cause, if upon OSU's Written finding that it is in the public interest to do so. Notification of rejection of all Proposals, along with the good cause justification and finding of public interest, will be sent to all who submitted a Proposal.

7.14 AWARDS:

OSU reserves the right to make award(s) by individual item, group of items, all or none, or any combination thereof. OSU reserves the right to delete any item from the award when deemed to be in the best interest of OSU.

7.15 LEGAL REVIEW:

Prior to execution of any Contract resulting from this Request for Proposal, the Contract may be reviewed a qualified attorney for OSU pursuant to the applicable OUS Internal Management Directive. Legal review may result in changes to the terms and conditions specified in the Request for Proposal, Exhibits, and Addenda.

7.16 PROPOSAL RESULTS:

A notice of intent to award containing the Proposal results will be issued to all Proposers. The Proposal file will be available for Proposer's review during the protest period at the PaCS Department. Proposers must make an appointment with the Administrative Contact to view the Proposal file. After the protest period, the file will be available by making a Public Records Request to OSU.

7.17 PROPOSAL PREPARATION COST:

OSU is not liable for costs incurred by the Proposer during the Request for Proposal process.

7.18 PROPOSAL CANCELLATION:

If a Request for Proposal is cancelled prior to the Proposal Due Date and Time, all Proposals that may have already been received will be returned to the Proposers. If a Request for Proposal is cancelled after the Proposal Due Date and Time or all Proposals are rejected, the Proposals received will be retained and become part of OSU's permanent Proposal file.

7.19 PROTEST OF CONTRACTOR SELECTION, CONTRACT AWARD:

Any Proposer who feels adversely affected or aggrieved may submit a protest within seven (7) calendar days after OSU issues a notice of intent to award a Contract. The protest must be clearly identified as a protest, identify the type and nature of the protest, and include the Request for Proposal number and title. The rules governing protests are at OAR 580-061-0145.

EXHIBIT A TERMS AND CONDITIONS

These Standard Terms and Conditions for Services shall govern the purchase by OSU from the Contractor and shall replace and supersede any terms and conditions presented by Contractor or any sales quotations, order acknowledgements, or similar forms unless otherwise specified in the Solicitation Documents or on the face of the Purchase Order issued by OSU.

1. DEFINITIONS:

As used in this Contract, the terms set forth below are defined as follows:

- a. "Contract" means only the documents listed below, which, in the event of any conflicts among them, must be interpreted in the following order of precedence:
 - i. The Solicitation Document and its Attachments and Addenda, if any; and
 - ii. The Purchase Order Issued by OSU
- b. "Contractor" means a person or organization with whom OSU has contracted for the provision of services pursuant to this Contract;
- c. "Contractor Intellectual Property" means any intellectual property owned by Contractor and developed independently from Contractor's performance of this Contract;
- d. "OAR" means the Oregon Administrative Rules;
- e. "ORS" means the Oregon Revised Statutes;
- f. "OSU" means the State of Oregon, acting by and through the State Board of Higher Education, on behalf of Oregon State University.
- g. "Solicitation Document" means the Request for Quotes, Invitation to Bid, Request for Proposals, or any other written document issued by OSU that outlines the required specifications necessary to submit a responsive quote, bid, proposal, or any other response;
- h. "Deliverables" means any item to be delivered by Contractor to OSU pursuant to this Contract, and all other materials that Contractor creates or develops in the course of its performance of the services.

2. ACCEPTANCE OF SERVICES:

Services furnished under this Contract are subject to acceptance by OSU. If OSU finds services furnished to be incomplete or not in compliance with the Contract, OSU, at its sole discretion, may either reject the services, require Contractor to correct any defects without charge, or negotiate with Contractor to reduce the price, whichever OSU deems appropriate under the circumstances. If Contractor is unable or refuses to cure any defects within a time deemed reasonable by OSU, OSU may reject the services and cancel the Contract in whole or in part.

3. SOFTWARE TERMS

- a. Programming Methodology. Collaboration with OSU. In connection with the services to be performed under this Contract, and unless and to the extent otherwise directed by OSU, Contractor will employ iterative and incremental programming methodology as described in 3.a ("Programming Methodology"). Contractor further acknowledges that OSU's present intention is to participate in the design and development of the Deliverables with an initial goal of participation by OSU and Contractor employees. Accordingly, Contractor will use its best efforts to support this goal. Notwithstanding anything that may be to the contrary in this Contract, however, and notwithstanding that OSU may participate in the software development contemplated hereunder in accordance with the Programming Methodology: (i) OSU will have no affirmative obligation to perform any software programming in connection with the subject matter of this Contract; and (ii) no performance by OSU of any software programming will be a condition precedent to Contractor's obligation to perform the services. Notwithstanding the generality of the foregoing, in the interest of saving time or for any other reason, OSU may, from time to time, and at any time, direct Contractor to conduct all software programming without the active participation of OSU.
- b. Documentation. Contractor acknowledges that providing high-quality documentation in connection with the Deliverables is an essential component of the services to be provided under this Contract. Accordingly, the Parties will cooperate in good faith to determine a standard of quality and formatting for the documentation (the "Documentation Standard"). All documentation created by Contractor under this Contract will conform to the Documentation Standard. In any event, the Documentation will meet or exceed known industry standards for software programming documentation.
- c. Status Reports. During the course of performing the services, and until the final Deliverable to be delivered under this Contract has been delivered to OSU, Contractor will provide status reports to OSU no less often than once each week. At a minimum, each such status report will state the following: (i) progress made since the last status report submitted to OSU; (ii) any barriers to the continued progress of the project; (iii) any reasonable measures OSU could take to speed or otherwise improve Contractor's ability to perform the services.

4. ACCESS TO RECORDS:

Contractor shall maintain books, records, documents, and other evidence and accounting procedures and practices sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. OSU, the Oregon State Board of Higher Education, Oregon Secretary of State, federal government, and their duly authorized representatives shall have access to the books, documents, papers, and records of Contractor which are directly pertinent to this Contract for the purpose of making audit, examination, excerpts, and transcripts. Contractor shall maintain such books and records for OSU's review for at least six years beyond the Term of the Contract unless OSU authorizes a shorter period in writing. Contractor shall promptly remedy any discrepancies involving deviation from the terms of this Contract and shall promptly reimburse OSU for any commitments or expenditures found by OSU to have been in excess of amounts authorized by OSU.

5. AFFIRMATIVE ACTION:

Pursuant to OAR 580-061-0030, Contractor certifies that Contractor has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

6. APPLICABLE LAW; JURISDICTION AND VENUE.

- a. This Contract is governed and shall be construed in accordance with the laws of the State of Oregon, without resort to any other jurisdiction's conflict of law rules or doctrines. Any claim, action, or suit between OSU and Contractor that arises out of or relates to performance of this Contract must be brought and conducted solely and exclusively within the Circuit Court for Benton County, for the State of Oregon.
- b. Notwithstanding the foregoing paragraph, if a claim must be brought in federal forum, it must be brought and adjudicated solely and exclusively in the United States District Court for the District of Oregon. This paragraph applies to a claim brought against OSU only to the extent Congress has validly abrogated OSU's sovereign immunity and is not consent by OSU to be sued in federal court. This paragraph is also not a waiver by OSU of any form of immunity, including without limitation sovereign immunity and immunity based on the Eleventh Amendment to the United States Constitution.

- c. Except as set forth in the paragraph above, the parties consent to in personam jurisdiction in the above courts and waive any objection to venue and any objection that the forum is inconvenient.

7. ASSIGNMENT/SUBCONTRACT/SUCCESSORS:

Contractor shall not assign, sell, transfer, or subcontract rights, or delegate responsibilities under this Contract, in whole or in part, without the prior written approval of the OSU Procurement and Contract Services Department, and any attempt by Contractor to assign, sell, transfer, or subcontract rights or delegate responsibilities under this Contract, without first acquiring written approval of the OSU Procurement and Contract Services Department, is void. No such written approval from OSU relieves Contractor of any obligations of this Contract, however, and any assignee, new owner, transferee or subcontractor will be considered an agent of Contractor. Contractor shall remain liable to OSU under the Contract as if no such assignment, sale, transfer, or subcontract had occurred. The provisions of this Contract are binding upon and will inure to the benefit of the parties to the Contract and their respective permitted successors and assigns.

8. COMPLIANCE WITH APPLICABLE LAW:

The parties shall at all times comply with all federal, state and local laws, regulations, executive orders and ordinances pertaining to their respective businesses, products or services, employment obligations, and the subject matter of this Contract. Without limiting the generality of the foregoing, Contractor expressly agrees to comply with the following laws, regulations and executive orders to the extent they are applicable to the Contract: (i) Titles VI and VII of the Civil Rights Act of 1964, as amended; (ii) Paragraphs 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) ORS Chapter 659, as amended; (ix) all regulations and administrative rules established pursuant to the foregoing laws; and (x) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations. These laws, regulations and executive orders are incorporated by reference herein to the extent that they are applicable to the Contract and required by law to be so incorporated.

9. CONFIDENTIALITY:

This Contract is subject to the limitations and conditions of the Oregon Public Records Law, ORS 192.410-192.505.

10. EXPORT CONTROL:

Contractor acknowledges that OSU has students and faculty who are foreign nationals who may work with the services, product or technology received from Contractor pursuant to this Contract. Contractor represents that it has informed OSU in writing, prior to executing this Contract if it is providing OSU any product or technology subject to the U.S. Export Administration Act of 1979, the Export Administration Regulations and the International Traffic in Arms Regulations, and if so, under what Commerce Control List number(s) or U.S. Munitions List number(s) it is controlled.

11. FORCE MAJEURE:

Neither OSU nor Contractor shall be held responsible for delay or default caused by fire, riot, act of nature, terrorist acts, or other acts of political sabotage, or war where such cause was beyond, respectively, OSU's or Contractor's reasonable control. Contractor shall make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon cessation of the cause, diligently pursue performance of its obligations under this Contract. However, if a default or delay due to a force majeure event continues for an unreasonable time, as determined by OSU, then OSU is entitled to terminate the Contract.

12. GOVERNMENT EMPLOYMENT STATUS:

Contractor certifies that it is not currently employed by the federal government and not an employee of OSU.

13. INDEMNITY, RESPONSIBILITY FOR DAMAGES:

- a. Contractor shall indemnify and hold harmless OSU, the Oregon State Board of Higher Education and their respective officers, board members, employees, agents and other representatives against claims, expenses, or losses: (i) that result from Contractor's negligence, wrongful acts or willful misconduct, or (ii) alleging Contractor's services, information or materials supplied by Contractor to OSU under this Contract, or OSU's use of any of the foregoing infringes on any patent, copyright, trade secret, trademark, or other proprietary right of a third party.
- b. OSU's right to receive indemnification under this Section is conditioned upon OSU giving reasonably prompt notice and assistance of any claim; provided however, that OSU's failure to provide notice and assistance does not limit OSU's right to indemnification except to the extent such failure or assistance materially affects Contractor's ability to defend the claim.
- c. Contractor's indemnification obligation under this Section includes but is not limited to all of OSU's expenses of litigation, court costs and reasonable attorney fees.

14. INDEPENDENT CONTRACTOR STATUS:

The services to be rendered under this Contract are those of an independent contractor. OSU reserves the right (a) to determine and modify the delivery schedule for the services and (b) to evaluate the quality of the services; however, OSU may not and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the services. Contractor is not an officer, employee or agent of OSU as those terms are used in ORS 30.265.

15. INSURANCE:

Contractor shall secure at its own expense and keep in effect during the term of this Contract general liability or professional liability insurance as deemed applicable by OSU with limits of not less than four million dollars (\$4,000,000) aggregate, unless otherwise specified in writing by OSU. Insurance policies are to be issued by an insurance company authorized to do business in the State of Oregon with a rating of A or better, or as deemed acceptable by OSU. If requested, Contractor shall provide proof of insurance of said insurance policy. If any of the liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of this Contract for a duration commiserate with the statute of limitations for tort claims in Oregon.

16. INVOICES AND PAYMENT TO CONTRACTOR:

Contractor shall send invoices to OSU for services accepted by OSU to OSU's Department at the address specified in the Purchase Order. Contractor shall include in each invoice:

- a. The Purchase Order number;
- b. The quantity of goods ordered, the quantity of goods delivered, the date goods were delivered, the price per unit;
- c. A detailed description of any services performed, the dates services were performed, the rate or rates for services performed, and the total cost of services; and
- d. The total amount due and the payment address.

OSU shall pay Contractor for services performed at the prices and rates specified herein. Contractor shall look solely to OSU for payment of all amounts OSU owes to Contractor. Payment of OSU contracts is normally made within 30-45 days following the date the invoice is received. After 45 days, Contractor may assess overdue account charges up to a maximum of two-thirds of one percent (2/3 of 1%) per month or eight percent (8%) per annum on the outstanding balance (ORS 293.462).

17. NOTICE:

Unless otherwise specified, any notice pursuant to this Contract shall be validly given if in writing and given to the other party, via e-mail, fax, or by registered or certified mail, postage prepaid, to the respective addressees of Contractor and OSU.

18. ORIGINAL WORKS:

Ownership of Deliverables. Except for Pre-Existing Work in a Deliverable, Contractor hereby irrevocably assigns to OSU any and all of its rights, title, and interest in Deliverables, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual property law or doctrine. Upon OSU's reasonable request, Contractor shall execute such further documents and instruments necessary to fully vest such rights in OSU. Contractor forever waives any and all rights relating to such Deliverables, including without limitation, any and all rights arising under 17 USC §106A or any other rights of identification of authorship or rights of approval, restriction or limitation on use or subsequent modifications. With respect to Pre-Existing Work in a Deliverable, Contractor hereby grants OSU, a perpetual, non-exclusive, irrevocable, royalty-free, world-wide license to use, copy, display, distribute, transmit and prepare derivative works of Pre-Existing Work, and to authorize others to do the same on OSU's behalf. "Pre-Existing Work" is listed in Exhibit A.

19. OSU NAME AND TRADEMARK:

Contractor's shall not use names, marks or trademarks identifying OSU, or any department or office of OSU, or in any other way identify OSU without prior written approval from OSU's Office of University Advancement.

20. PARKING:

Contractors doing business on the OSU campus may be required to have a permit to park, if utilizing restricted street parking or parking lots. Contractor parking permits may be picked up from OSU's Office of Transit & Parking Services.

21. RECYCLABLE PRODUCTS:

Contractors will use recyclable products to the maximum extent economically feasible in the performance of the Contract.

22. REMEDIES FOR CONTRACTOR'S DEFAULT:

In the event Contractor is in default, OSU may, at its option, pursue any or all of the remedies available to it under this Contract and at law or in equity, including, but not limited to: (a) rejection of the services, (b) requiring Contractor to correct any defects without charge, (c) negotiation with Contractor to sell the services to OSU at a reduce price, (d) termination of the Contract, (e) withholding all moneys due for the services Contractor has failed to deliver within any scheduled completion dates or has performed inadequately or defectively, (f) initiation of an action or proceedings for damages, specific performance, or declaratory or injunctive relief, or (g) exercise of its right of set off. These remedies are cumulative to the extent the remedies are not inconsistent, and OSU may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

23. RETIREMENT SYSTEM STATUS:

Contractor is not a contributing member of the Public Employees' Retirement System and will be responsible for any federal or state taxes applicable to payment under this Contract. Contractor will not, by virtue of this Contract, be eligible for federal Social Security, employment insurance, workers' compensation or the Public Employees' Retirement System, except as a self-employed individual.

24. SAFETY AND HEALTH REQUIREMENTS/HAZARD COMMUNICATION:

Services supplied under this Contract shall comply with all federal Occupational Safety and Health Administration (OSHA) requirements and with all Oregon safety and health requirements, including those of the State of Oregon Workers' Compensation Division. Contractor shall notify OSU prior to using products containing hazardous chemicals to which OSU employees may be exposed. Products containing hazardous chemicals are those products defined by Oregon Administrative Rules, Chapter 437. Upon OSU's request, Contractor shall immediately provide Material Safety Data Sheets, as required by OAR 437-155-025, for the products subject to this provision.

25. SEVERABILITY:

The invalidity, illegality or enforceability of any provision of this Contract shall not affect the validity, legality or enforceability of any other provision of this Contract, which shall remain in full force and effect and shall be liberally construed in order to effectuate the purpose and intent of this Contract.

26. SEXUAL HARASSMENT:

The State Board of Higher Education has adopted polices applicable to Contractors that prohibit sexual harassment, and Contractor's company and employees are required to adhere to OSU's policy prohibiting sexual harassment in their interactions with members of the OSU community.

27. SURVIVAL:

The terms and conditions of this Contract that by their sense and context are intended to survive termination or expiration hereof shall so survive.

28. TAX COMPLIANCE CERTIFICATION:

Contractor certifies under penalty of perjury that Contractor is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321 and 323 and the elderly rental assistance program under ORS 310.630 to 310.706 and local taxes administered by the Department of Revenue under ORS 305.620.

29. TERMINATION:

This Contract may be terminated at any time by mutual consent of both parties or by OSU upon thirty (30) days' notice in writing and delivered by certified mail or in person to the other party. In addition, OSU may terminate this Contract at any time by written notice to Contractor if (a) Federal or state statutes, regulations or guidelines are modified or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this Contract; (b) any license or certificate required by law or regulation to be held by the Contractor to provide the services required by this Contract is for any reason denied, revoked, or not renewed; or (c) OSU fails to receive sufficient legislative appropriations (or from applicable federal, state, or other sources) to permit OSU, in the exercise of its reasonable administrative discretion, to fulfill its obligations under this Contract, or if the OSU program for which this Contract was executed is abolished. This Contract may also be terminated by OSU for default (including breach of contract) if (a) Contractor fails to timely provide services or materials called for by this Contract; or (b) Contractor fails to perform any of the other provisions of this Contract, or so fails to pursue the work as to endanger performance of this Contract in accordance with its terms and conditions, and after receipt of

written notice from OSU, fails to correct such failures within ten (10) days. The rights and remedies of OSU provided in the above clause related to defaults (including breach of contract) by Contractor shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Contract.

30. THIRD PARTY BENEFICIARY:

OSU and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third parties.

31. WAIVER:

Failure of OSU to enforce any provision of this Contract will not constitute a waiver or relinquishment by OSU of the right to such performance in the future nor of the right to enforce any other provision of this Contract.

32. WORKERS' COMPENSATION:

The Contractor, its subcontractors, if any, and all employers providing work, labor or materials under this Contract are subject employers under the Oregon Workers' Compensation law and shall comply with ORS 656.017, which requires them to provide workers' compensation coverage that satisfies Oregon law for all their subject workers, unless such employees are exempt under ORS 656.126.

33. MERGER:

THIS CONTRACT CONSTITUTES THE ENTIRE CONTRACT BETWEEN THE PARTIES. THERE ARE NO UNDERSTANDINGS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS CONTRACT. NO AMENDMENT, CONSENT, OR WAIVER OF TERMS OF THIS CONTRACT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY ALL PARTIES. ANY SUCH AMENDMENT, CONSENT, OR WAIVER IS EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN.

**EXHIBIT B
CERTIFICATIONS**

By signature on this certification the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury the undersigned will comply with the following:

SECTION I. OREGON TAX LAWS

The undersigned hereby certifies under penalty of perjury that the undersigned is authorized to act on behalf of Proposer and that Proposer is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321 and 323 and the elderly rental assistance program under ORS 310.630 to 310.706 and local taxes administered by the Department of Revenue under ORS 305.620.

SECTION II. AFFIRMATIVE ACTION

The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030 (3).

SECTION III. COMPLIANCE WITH SOLICITATION

The undersigned agrees and certifies that they:

1. Have read, fully understands and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal; and
2. Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or Contract termination; and
3. Will furnish the designated item(s) and/or service(s) in accordance with the Request for Proposal and the Contract; and
4. Has provided a correct Federal Employer Identification Number or Social Security Number with the Proposal.

SECTION IV. PERMISSIVE COOPERATIVE PROCUREMENTS

If Proposer is awarded a contract from this Request for Proposal, Proposer hereby (check one)

- agrees
 disagrees

to offer the resulting contractual terms and prices to other public institutions.

Authorized Signature: _____

Date: _____

Name (Type or Print): _____

Telephone:(_____)_____

Title: _____

Fax:(_____)_____

FEIN ID# or SSN# (required): _____

Email: _____

Company: _____

Address, City, State, Zip: _____

Construction Contractors Board (CCB) License Number (if applicable): _____

Business Designation (check one):

- Corporation Partnership LLC Sole Proprietorship Non-Profit

Minority, Women & Emerging Small Business (MWESB) Certified Firm: Yes No

If yes, Minority, Women & Emerging Small Business (MWESB) Certification Number: _____

**EXHIBIT C
REFERENCES**

REFERENCE 1

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

REFERENCE 2

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

REFERENCE 3

COMPANY: _____ CONTACT NAME: _____
ADDRESS: _____ PHONE NUMBER: _____
CITY, STATE ZIP: _____ FAX NUMBER: _____
WEBSITE: _____ E-MAIL: _____
GOODS OR SERVICES PROVIDED: _____

EXHIBIT D PROJECT SCOPE

1.0 PROJECT DETAILS

1.1 Application and User Groups

- 1.1.1 Salesforce.com (SFDC) Application
 - 1.1.1.1 2 Full Sandboxes
- 1.1.2 Total Users
 - 1.1.2.1 40,000 Applicants & References - Customer Portal Manager Custom licenses
 - 1.1.2.2 920 – Program, Committee, and Graduate School Users; Integration User - Enterprise Edition (Restricted Use) licenses
 - 1.1.2.3 10 System Administrators and Developers - Enterprise Edition licenses
- 1.1.3 User Groups
 - 1.1.3.1 Applicant (Portal User)
 - 1.1.3.2 Reference (Portal User)
 - 1.1.3.3 Program Administrator / PAR
 - 1.1.3.4 Program Admissions Committee Member
 - 1.1.3.5 Graduate School Administrator
 - 1.1.3.6 Graduate School User

1.2 Data Sources

- 1.2.1 Banner
- 1.2.2 Nolij

1.3 Integration Points (OSU existing systems and external service providers)

- 1.3.1 Banner
- 1.3.2 Nolij
- 1.3.3 TouchNet
- 1.3.4 SaasPose
- 1.3.5 Shibboleth
- 1.3.6 Microsoft Exchange
- 1.3.7 Integrator identified 3rd party apps

1.4 Middleware / Toolset

- 1.4.1 Potentially Cast Iron (currently undetermined) or similar product

2.0 PROJECT TEAM RESPONSIBILITIES

2.1 Integrator will perform the following tasks:

- 2.1.1 Overall project management and scheduling
- 2.1.2 System Architecture requirements elicitation, design & implementation
- 2.1.3 Security architecture requirements elicitation, design & implementation
- 2.1.4 Custom Salesforce Applications
- 2.1.5 Portal Development
- 2.1.6 3rd Party App Integration
- 2.1.7 Support individual Oregon State Academic Programs customizations/training

2.2 Integrator will perform the following data integration/migration tasks:

- 2.2.1 Provide Target Data Schema and Data Flow
- 2.2.2 Migration: Complete data migration
- 2.2.3 Develop specific templates identifying the form and format in which the data is to be delivered by Oregon State for migration.
- 2.2.4 Train Oregon State IT Staff: Review documentation, train on modifications, updates and performing backups

2.3 Oregon State will perform the following tasks:

- 2.3.1 Security and system architecture testing specification
- 2.3.2 Development of online admission application
- 2.3.3 Overall theming
- 2.3.4 Lead individual Oregon State Academic Programs customizations/training

2.4 Oregon State will perform the following integration/migration tasks:

- 2.4.1 Provide source data schema and data flow

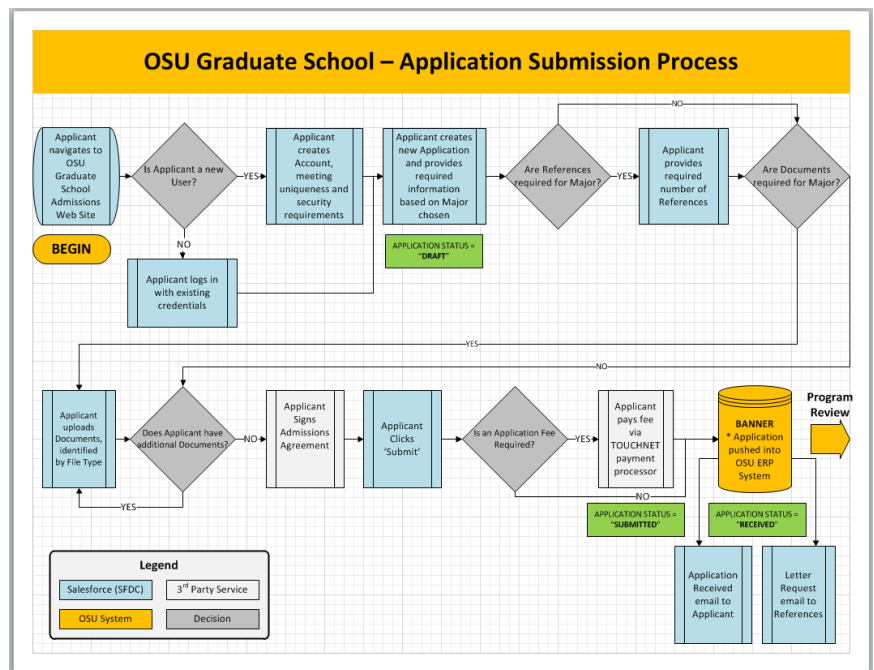
- 2.4.2 VPN Access to server
- 2.4.3 Remote desktop access to the middleware / integration appliance
- 2.5 Integrator and Oregon State will collaborate to perform the following tasks:
 - 2.5.1 Perform system and security testing/modifications
- 2.6 Integrator and Oregon State will collaborate to perform the following integration/migration tasks:
 - 2.6.1 Perform Data Mapping: Map Source and Target data and create any transformations or look-ups
 - 2.6.2 Test Data Mapping: Verify Target data source is populated correctly, validate all lookups are working as expected
 - 2.6.3 Test Migration: Perform series of test migrations (2 or 3) with Oregon State validating results – and Integrator adjusting mapping files accordingly
 - 2.6.4 Test Integration: Over a specified period test that data is being inserted or updated
- 2.7 Initial Data Extract and Load
 - 2.7.1 The initial load data from the source system(s) indicated above will be proved by Oregon State IT resources and it will be the responsibility of the integrator to load the data into the Salesforce instance for the following objects:
 - 2.7.1.1 Current Applicants and References
 - 2.7.1.2 Documents (Nolij links)
 - 2.7.1.3 Applications (Current)
 - 2.7.1.4 Applications (Historical)
 - 2.7.1.5 SFDC Users (Program and Graduate School)
 - 2.7.2 It is the responsibility of the integrator to provide detailed information about the proper form and format of the above described data.

3.0 PROCESS FLOW DIAGRAMS

The following process flow diagrams represent the life cycle of an Application from creation and submission by an Applicant to review and an acceptance decision by Programs/Graduate School.

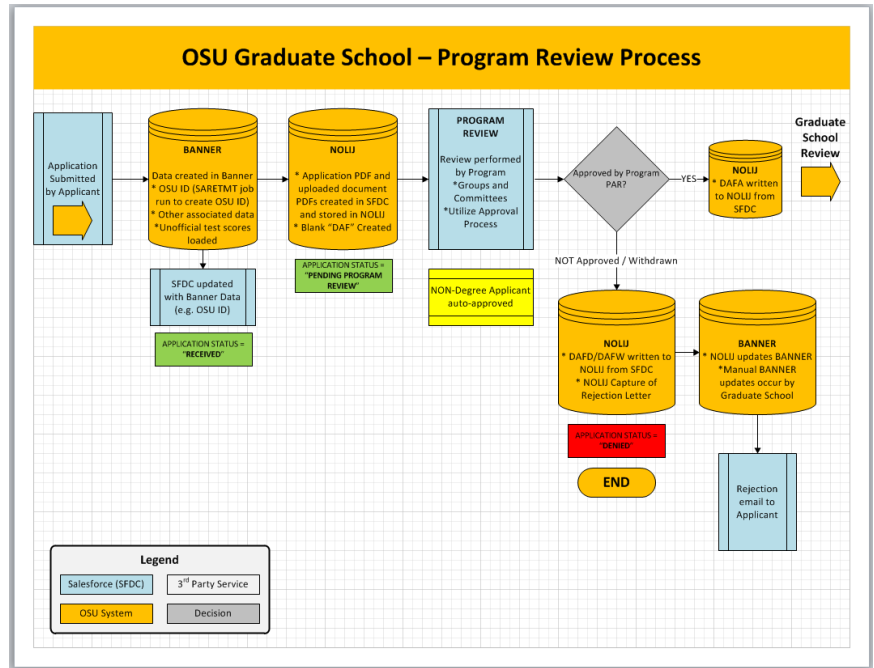
3.1 Application Submission

The initial creation of an Application is spawned by an Applicant logging into a portal. The applicant must 'Submit' an Application before it is reviewed by an Academic Program however the Program's do have the option of viewing in-process applications.



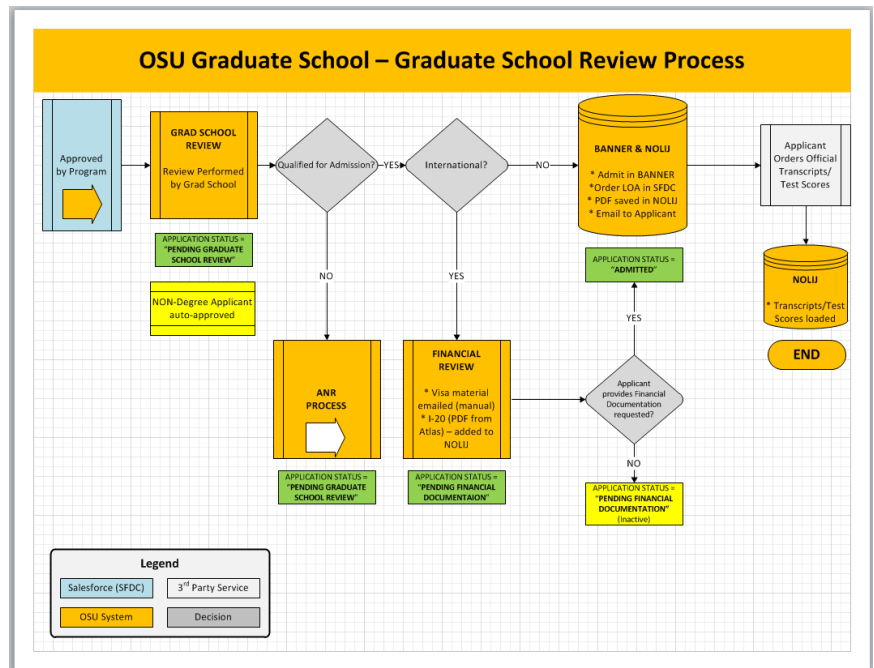
3.2 Program Review

Once an Application has been submitted, the relevant Program pertaining to the underlying Major first reviews all information provided based on Groups and Committees. Program users will use SFDC as their primary system for reviewing Applicants based on updates from Banner and document links in Nolij. If the Primary Admission Role (PAR) approves the Applicant, the final decision is forwarded onto the Graduate School.



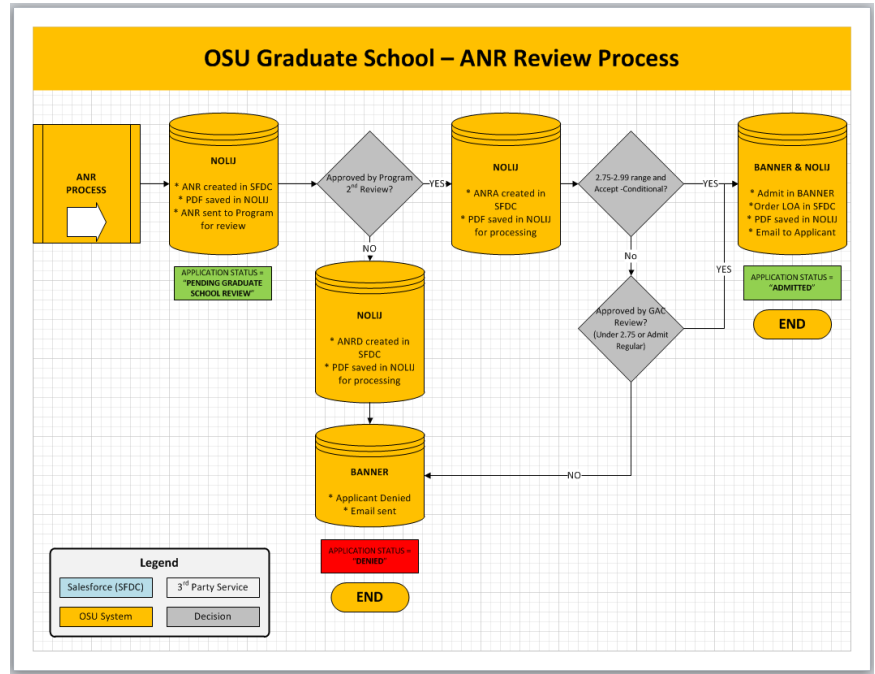
3.3 Graduate School Review

After an Application has been initially approved by a Program, the Graduate School makes the final determination whether an Applicant is accepted. Graduate School users will continue to use Banner and Nolij as their primary system for reviewing Applicants.



3.4. Advance Notice of Rejection (ANR) Review

If the Graduate School deems that an Applicant is not qualified for admission, the Application enters the Advance Notice of Rejection (ANR) process. This gives the underlying Program an opportunity for a second review of the Applicant and Graduate Admissions Council (GAC) review if necessary.



6. ADMISSIONS

Admissions is focused on portal users (Applicants and References) and OSU staff (Program and Graduate School users). Portal functionality and back-end functionality are defined for the Application process.

6.1. Functional Requirements

	Category/ Sub-Category	Functional Requirements
4.1.1	Admissions/ Applicant	<p>Documents can be uploaded by an Applicant before they Submit their Application.</p> <p>An OSU ID is only issued for an Applicant once an Application has been submitted.</p> <p>-----</p> <p>SFDC must temporarily hold any Documents uploaded by an Applicant prior to submitting an Application.</p> <p>Any application subsequently submitted will have its Documents auto-converted into PDFs and uploaded into Nolij, resulting in SFDC Document links (referencing Nolij).</p>
4.1.2	Admissions/ Applicant	<p>Optional documents can be added post Application submission.</p> <p>-----</p> <p>Applicants must be given the opportunity to continue uploading relevant documents for an Application after submission.</p>

	Category/ Sub-Category	Functional Requirements
4.1.3	Admissions/ Applicant	<p>Applicant cannot add/edit application data or delete Documents once an Application has been submitted.</p> <p>Exception is the uploading of new Documents and updating of address information.</p> <p>-----</p> <p>Application fields must be set to Read-Only for Applicant after Submission, except for Address.</p>
4.1.4	Admissions/ Applicant	<p>Applicant can create/submit multiple Applications for same or multiple terms.</p> <p>Multiple Applications can be affiliated with a single Applicant.</p> <p>-----</p> <p>A One-to-Many relationship between an Applicant and Applications.</p>
4.1.5	Admissions/ Applicant	<p>Applicant can designate multiple References.</p> <p>0-10 references can be associated with an Application, depending on a given Program (Name and Email Address).</p> <p>Applicants can add additional references post submission</p> <p>-----</p> <p>Affiliated Reference object (one-to-many mapping between an Application and References).</p>
4.1.6	Admissions/ Applicant	<p>References can be notified of a letter request by an Applicant prior to an Application being Submitted.</p> <p>Email to reference is logged with Application.</p> <p>-----</p> <p>Email activity logging needs to be affiliated with an Application for all relevant Application correspondence.</p>
4.1.7	Admissions/ Applicant	<p>Any References listed that have not been previously notified of a letter request will automatically be sent one when an Application has been Submitted.</p> <p>-----</p> <p>Notify outstanding References of a Letter Request upon submission of an Application.</p>
4.1.8	Admissions/ Applicant	<p>Applicant must indicate whether they waive the right to review a Letter of Reference (per Family Education Rights and Privacy Act of 1974).</p> <p>OSU to determine whether this waiver can be selectively chosen per Reference.</p> <p>-----</p> <p>Applicants must answer 'Yes' on an Application to waive their rights to review all Letters of Reference.</p>
4.1.9	Admissions/ Applicant	<p>Applicants can check whether a Reference Letter has been received or is outstanding.</p> <p>-----</p> <p>Visual indicator noting whether a Reference Letter has been received, in order for an Applicant to decide whether to send a Reminder or select a new Reference.</p>
4.1.10	Admissions/ Applicant	<p>Applicants can trigger email reminders to References and change Reference if nothing submitted.</p> <p>-----</p> <p>Option to resend email reminder for a designated Reference.</p> <p>Ability to delete and add a new Reference if a Reference Letter has not been received.</p>

	Category/ Sub-Category	Functional Requirements
4.1.11	Admissions/ Applicant	<p>Previous College section allows for entering of prior education and uploading of unofficial transcripts ("Academic Records" for International Students).</p> <p>OSU transcripts automatically provided for Applicants (based on OSU ID).</p> <p>OSU transcript PDF is automatically created in Nolij – Created by Appworx job – Viewable in GSAS</p> <p>Official transcripts only viewable through NOLIJ by Program and Graduate School users.</p> <p>-----</p> <p>Provide selection of a legitimate College/University School Code based on a list of defined picklist values.</p> <p>Each College entered contains a set of related fields (e.g. Address, GPA, Attendance Dates, Degrees).</p> <p>Ability to upload relevant unofficial transcripts per College.</p>
4.1.12	Admissions/ Applicant	<p>Applicant modifications can be made to a submitted Application by filling out a Change form.</p> <p>Degree, Term (only once in original Application academic year), Campus changes - CHNG form created and saved to Nolij.</p> <p>Applicant can Cancel an Application at any time - CNCL form created and saved to Nolij.</p> <p>Address (mailing and email) - BANNER updated.</p> <p>-----</p> <p>Change forms can be completed within SFDC for Program/Graduate School review and actions.</p>
4.1.13	Admissions/ Applicant	<p>Non-Degree Applicants skip Program review.</p> <p>Separate questions and documents pertain to Non-Degree applicants per Program.</p> <p>-----</p> <p>Programs affiliated with non-Degrees need to be identified in order to bypass internal Program and Graduate School approval processes.</p> <p>Program attribute for non-Degrees should designate this information.</p>
4.1.14	Admissions/ Reference	<p>Provide online access for References to submit their letters on behalf of an Applicant, affiliated with a given Application.</p> <p>References can upload PDF, LaTeX, txt or Tiff document types.</p> <p>Record IP address of each Reference provider - display a warning if the same IP is recorded for multiple Reference providers or Applicant (can be disabled by Graduate School).</p> <p>-----</p> <p>Employ similar functionality for References that Applicants have access to in the Portal for uploading of Documents that are automatically converted into PDFs and stored as links in SFDC.</p> <p>In the event that a Reference is contacted prior to an Applicant submitting their Application and being issued an OSU ID, any Documents uploaded by a Reference will be stored locally in SFDC until the relevant Application has been submitted.</p>

	Category/ Sub-Category	Functional Requirements
4.1.15	Admissions/ Reference	<p>A Reference should only be granted a single portal Account based on their common email address used.</p> <p>SFDC Reference portal Accounts should provide them the ability to view and manage the status of Reference requests for multiple Applicants if applicable.</p> <p>-----</p> <p>Upon logging into the Portal as a Reference, the ability to see multiple Applicants/Applications awaiting their Letter should be viewable.</p> <p>One-to-Many relationship between a Reference and Applicants/Applications.</p>
4.1.16	Admissions/ Reference	<p>References must answer questions specified by a given Program.</p> <p>-----</p> <p>Specific question fields relevant to a given Program must be answered by a Reference tied to a given Applicant/Application.</p>
4.1.17	Admissions/ Reference	<p>A Reference must be informed whether their letter provided is accessible by an Applicant (per their waived right to review).</p> <p>Provides the ability for a Reference to provide more candid information about an Applicant.</p> <p>-----</p> <p>Visual checkbox to inform a Reference whether the underlying Applicant can view their Letter of Reference.</p>
4.1.18	Admissions/ Reference	<p>References have the ability to decline their input for an Applicant.</p> <p>-----</p> <p>References declining to provide a Letter of Reference must be marked as such for a given Application, in order for an Applicant to enter a new Reference.</p>
4.1.19	Admissions/ Program	<p>Program Administrator needed for each Program to manage Groups.</p> <p>Primary Admission Role (PAR). Can be multiple individuals in this role.</p> <p>-----</p> <p>Public Groups need to be defined per Program and managed by Program Administrators.</p> <p>User roles for a given Group will need to be defined in order to be referenced by an Approval Process for a given Program.</p>

	Category/ Sub-Category	Functional Requirements
4.1.20	Admissions/ Program	<p>Programs need the ability to maintain their own Groups and Roles, including managing their own relevant fields/sections relevant for a given application (e.g. Majors applicable for specific Terms, Application Deadlines, Min/Max References, Additional Questions, Program Instructions and Contact Information).</p> <p>The preference is for designated PARs to fulfill the support needs of their respective Programs, in lieu of relying on a Graduate School Administrator or SFDC System Administrator (which can also provide these functions).</p> <p>Data, documents, and emails can only be viewed by designated Roles (e.g. Applicant cannot view a Reference letter).</p> <p>Groups:</p> <ul style="list-style-type: none"> • Create/define groups • Group membership • Group workflows (routing) <p>Roles:</p> <ul style="list-style-type: none"> • Primary Admission Role • Committee Members • Individuals can have access/responsibility for multiple majors (potentially across Colleges) <p>-----</p> <p>Program Admins need to manage their own program Questions for a given Application type. Program Admins also need access to define and update approval processes for their Programs, based on the composition of Committee members.</p> <p>Sharing Rules and Roles will also need to be defined to provision security access to view Applications.</p>
4.1.21	Admissions/ Program	<p>Committee Members have the ability to review all Application data and documents.</p> <p>They can also recommend actions with comments.</p> <p>-----</p> <p>Subset of Program users need to be granted sharing access for Applications based on their Group membership.</p>
4.1.22	Admissions/ Program	<p>Different required fields and additional documentation (e.g. Custom Forms) may be required for a given Program Application.</p> <p>The underlying Application may look different for each specific Program, which would be managed by a Program PAR.</p> <p>-----</p> <p>PARs need to be granted access to create and update relevant questions and answers for their Programs.</p>

	Category/ Sub-Category	Functional Requirements
4.1.23	Admissions/ Program	<p>Ability for a PAR to submit a DAF decision (note: there may be several people filling the PAR role).</p> <p>PAR is able to flag multiple Applications needing discussion for batch decisions.</p> <p>Three buttons for DAF designation for a PAR: - DAFA=Accept; Accept Regular, Accept Conditional, Accept Provisional (with text box); Funding offered (GRA, GTA) - DAFD=Deny; comments in text box - DAFW=Withdraw; comments in text box</p> <p>-----</p> <p>The final step of a Program approval process for a given Application would be the setting of a corresponding DAF status value for Accept, Deny, or Withdraw.</p>
4.1.24	Admissions/ Program	<p>PAR modifications can be made after a DAF decision has been made.</p> <p>PARs can submit a modified DAFA - potential modifications to Degree, Term, or Campus, including a comments field for other changes.</p> <p>PARs can re-submit any DAF decision.</p> <p>-----</p> <p>PARs would have ability to fill out a <u>change form</u> to change term, degree, etc. Note: PARs do not change records directly – GS staff would make these changes in Banner.</p> <p>An Application can be also be re-submitted for Approval by a Program if applicable.</p>
4.1.25	Admissions/ Program	<p>Ability to sort Applications by Status and Document Status for a given Program.</p> <p>Provide ability to easily spot exceptions and those Applications needing attention.</p> <p>-----</p> <p>Create list views and reports to accommodate specific needs for Program users.</p> <p>Default list views and reports can be created for general usage, in addition to training users on how to create custom ones.</p>
4.1.26	Admissions/ Program	<p>Ability to search on Email Address, OSU ID, SFDC ID, Name, DOB, Phone Number, Program defined (tracks).</p> <p>-----</p> <p>Application records need to appear in search results.</p> <p>Application ID must be searchable.</p>
4.1.27	Admissions/ Program	<p>Program users can receive emails about Applications.</p> <p>Program can opt to receive email alerts for specific Roles or sign in and look at Applicant view.</p> <p>-----</p> <p>Must be able to notify select Program users of new Applications submitted.</p>

	Category/ Sub-Category	Functional Requirements
4.1.28	Admissions/ Program	<p>Ability to cull select records and export them into Excel or CSV format.</p> <p>-----</p> <p>Reports containing underlying criteria can be saved and re-run/exported in the future, allowing users to export this information.</p> <p>Implement a set of default reports that can be referenced by both Program and Graduate School users, including related Dashboards if applicable.</p> <p>Provide reporting access for users to create and save their own reports based on explicit criteria.</p>
4.1.29	Admissions/ Graduate School	<p>Graduate School users will continue to use BANNER and Nolij as their primary system for viewing and evaluating Applications.</p> <p>Decision is entered in BANNER.</p> <p>-----</p> <p>Underlying decisions made by Graduate School users in Banner must update relevant field values (including Status) for an Application.</p> <p>Approvals conducted within BANNER will need to be documented for an Application.</p>
4.1.30	Admissions/ Graduate School	<p>Need the ability for limited Users to designate an Application as 'No Fee'.</p> <p>This option needs to be provided for select Graduate School users on an ad-hoc basis.</p> <p>Some external programs allow for Non-Payment. Need to validate Program, send notification of verification to appropriate OSU faculty.</p> <p>Some Programs can be applied for without paying a fee (i.e. Deferrals and Waivers).</p> <p>-----</p> <p>Checkbox for Application that would indicate 'No Fee' to bypass Payment Processor upon Submission by an Applicant.</p>
4.1.31	Admissions/ Graduate School	<p>Ability to flag, assign colors, priorities to records.</p> <p>Sort records by DAF Date, Major, etc.</p> <p>-----</p> <p>Allow Graduate School users to set list priority fields for an Application either directly or via mapped values from Banner.</p>
4.1.32	Admissions/ Graduate School	<p>Ability to easily identify new Applications received.</p> <p>-----</p> <p>Create list views and reports to accommodate specific needs for Graduate School users.</p> <p>Default list views and reports can be created for general usage, in addition to training users on how to create custom ones.</p>
4.1.33	Admissions/ Graduate School	<p>Ability to add notes and comments to records.</p> <p>-----</p> <p>Allow Graduate School users to add Comments for an Application either directly or via mapped values from Banner.</p>
4.1.34	Admissions/ Graduate School	<p>Ability to request missing documents from Applicants.</p> <p>-----</p> <p>Create email alerts for Applicants, which can be referenced by Graduate School and academic program users.</p>

	Category/ Sub-Category	Functional Requirements
4.1.35	Admissions/ Graduate School	<p>Letter of Admissions is a very manual process today, which needs to be automated within SFDC.</p> <p>Current Process:</p> <ul style="list-style-type: none"> · Order the letter in BANNER (this happens in SAAADMS and shows as requested/sent in SUAMAIL) · · An APPWORX Job is run to get a CSV file that is converted into XLSX to do a mail merge · The XLSX file is merged into a WORD document · The merged Letters of Admission are emailed to the applicants · A macro is run to convert the WORD document into individual PDF files. · Login to WinSCP to move the individual PDFs of the letters from one server to another · Another APPWORX job is run to move the letters from that server into NOLIJ <p>-----</p> <p>Custom email templates that can be referenced by the Graduate School users for different types of letters/emails, contingent on missing information (variable paragraphs).</p>
4.1.36	Admissions/ Graduate School	<p>Advance Notice of Rejection (ANR) can be recorded in BANNER with Comments if Application does not meet minimum requirements.</p> <p>Notification of action and requirements is created, PDF'd and saved to Nolij.</p> <p>Program must respond in 30 days, at which point appropriate GS staff are notified (e.g. via email).</p> <p>Program reviews comments and Application and uploads ANRA or ANRD decision and additional documents as required.</p> <p>-----</p> <p>ANR PDF file must be uploaded with an optional Comment field to document ancillary information not included in the ANR.</p> <p>All file link records in SFDC should be associated with a Comment field.</p>

7. SYSTEM & SECURITY

Key SFDC functionality desired.

7.1. Functional Requirements

	Category/ Sub-Category	Functional Requirements
5.1.1	System & Security/ Analytics	<p>Program users have a need to dynamically select the population and data fields for export to csv/xlxs.</p> <p>Need the ability to save user preferences or the population selection.</p> <p>-----</p> <p>Implement a set of default reports that can be referenced by both Program and Graduate School users, including related Dashboards if applicable.</p> <p>Provide reporting access for users to create and save their own reports based on explicit criteria.</p>
5.1.2	System & Security/ Communications	<p>All system users can open a help request ticket within two clicks of any screen.</p> <p>Ticket submission will capture: name, phone #, email address, issue category, issue description & urgency (OS, Browser, IP).</p> <p>-----</p> <p>Implement Cases with specific case types based on the technical issue reported.</p>
5.1.3	System & Security/ Communications	<p>Administrators need the ability to sort, review and reply to Help Tickets (by Applicants, References, Program Users, and Graduate School Users?)</p> <p>Dashboard reporting capability needed.</p> <p>-----</p> <p>Provide list views for Cases pertinent to type and status.</p> <p>Reports and Dashboards to highlight support metrics.</p>
5.1.4	System & Security/ Communications	<p>Email correspondence with Applicant and Reference needs to be driven by SFDC based on workflows and automation.</p> <p>Email notifications to Applicant include Assigned OSU ID, confirmation of Submitted Application, confirmation of Reference submission, Application Accepted/Denied decision.</p> <p>Email notifications to Reference include Reference request and Reference reminders.</p> <p>-----</p> <p>Email alerts need to be created based on specific criteria such as Application Status, Missing information, Reference received.</p>
5.1.5	System & Security/ Document handling	<p>All relevant questions on an Application form requesting an Upload should be associated with a separate Upload section for that document type.</p> <p>Documents need to be classified by Category Type and multiple documents can be uploaded for any category.</p> <p>Striving for a friendly step-by-step user interface, in lieu of a single, generic Documents section to upload all files.</p> <p>Document verification status should be reflected (confirmation of upload and document link).</p> <p>-----</p> <p>A generic Document section will also allow an Applicant to upload specific types of files, which must be manually designated by type. The specific file type are to be determined by the Graduate School.</p>

	Category/ Sub-Category	Functional Requirements
5.1.6	System & Security/ Document handling	<p>Documents can be selected and 'rolled up' into a single document by Program users.</p> <p>Alternatively, Documents can be viewed as a Group (with scrolling/paging).</p> <p>-----</p> <p>Document bundling request within SFDC needs to provide ability to select multiple Document links that reference existing OSU AppWorx job, and returns a single concatenated PDF file in the order specified by the user.</p>
5.1.7	System & Security/ Document handling	<p>Comments can be associated with Documents.</p> <p>-----</p> <p>An optional Comments field needs to be available when uploading Documents.</p>
5.1.8	System & Security/ Document handling	<p>Upload capability for an Application can be disabled with Graduate School and Program over-ride option.</p> <p>Based on Application term, type and Status (includes Exceptions).</p> <p>-----</p> <p>Selective ability to lock an Applicant's application from being able to upload any additional Documents.</p>
5.1.9	System & Security/ Document handling	<p>General list of default documents required dependent on Citizenship and Major.</p> <p>Tied to underlying Checklist page.</p> <p>-----</p> <p>Provide a Checklist page that visually depicts what Documents are required</p>
5.1.10	System & Security/ Document handling	<p>At time of Submission, Application is converted to PDF and stored in Nolij.</p> <p>DAF (empty) image is stored in Nolij.</p> <p>Link to PDF viewable in SFDC.</p> <p>-----</p> <p>Invoke SFDC PDF rendition of Application data - store in Nolij, with link in SFDC.</p>
5.1.11	System & Security/ General Functionality	<p>Use of multiple license type to reduce total SFDC licensing costs.</p> <p>40,000 portal licenses needed annually for Applicants (10,000) and References (30,000), assuming an average of three unique References per Applicant.</p> <p>900 licenses needed for Program/Committee Users (800) and Primary Admission Roles/PARs (100).</p> <p>31 licenses needed for Graduate School users (20), an Integration User (1), and System Administrators/Developers (10).</p>
5.1.12	System & Security/ General Functionality	<p>General attributes for all Application forms determined by related field hierarchy by Degree Type, Citizenship, Campus and Program field of study.</p> <p>Degree Type: degree; non-degree Campus: Corvallis, Bend, Distance Citizenship: Domestic/International Program: Major/Degree/Term</p> <p>Managed by Graduate School.</p> <p>-----</p> <p>Required fields based on Citizenship.</p> <p>Dependent picklists to limit applicable selections for Campus, Major, Degree, and Term.</p>

	Category/ Sub-Category	Functional Requirements
5.1.13	System & Security/ General Functionality	<p>An Application contains intermediate Status Values - it must be completed with the required fields designated by a Program prior to being "Submitted" by an Applicant.</p> <p>Status Values:</p> <ul style="list-style-type: none"> • Draft • Submitted • Received • Pending Program Review • Pending Graduate School Review • Pending Financial Documentation (International only) • Admitted • Denied • Withdrawn • Pending Cancellation • Canceled <p>An Applicant can only update a new Application from 'Draft' to 'Submitted'. Once 'Submitted', all subsequent Application status values are updated via integration with BANNER, including PDF letter of decision (from Nolij).</p> <p>-----</p> <p>Pages use validation rules for an Application, to ensure that required fields for a Program are provided.</p>
5.1.14	System & Security/ General Functionality	<p>Domestic and International Applicants have different required documents that must be uploaded for an Application.</p> <p>For example, International Applicants must complete an International Finance form.</p> <p>-----</p> <p>Record Types, Page Layouts, and Validation Rules needed for Domestic versus International Applicants.</p>
5.1.15	System & Security/ General Functionality	<p>Application process must accommodate both paid and non-paid Applications (based on Program).</p> <p>-----</p> <p>Only the Graduate School can designate if Applications are Exempt from the standard fee.</p> <p>Any pre-approved no-fee Applications will bypass the TouchNet Payment Processor</p>
5.1.16	System & Security/ General Usability	<p>Identification of existing SFDC users should be alerted and not issued an additional portal Account.</p> <p>Issuance of SFDC licenses must check for existing accounts already assigned.</p> <p>-----</p> <p>Only one SFDC license should be assigned per User (check based on existing Username/Email Address and historical (multiple) email addresses).</p>
5.1.17	System & Security/ General Usability	<p>Online Application process must be easy to use and replace the current web application.</p> <p>The intent is to design this as an integrated, seamless experience with the underlying OSU website. There is a desire to investigate integrating the Salesforce applicant/student portal with the MyOSU portal -> SSO implications must be researched.</p>
5.1.18	System & Security/ Security	<p>SFDC Portal Accounts for both Applicants and References needs to be self-generated.</p> <p>Access to the Graduate School Admissions Portal should be easy, intuitive and self-serving. SFDC Applicant and Reference portal accounts must not be created manually.</p>

	Category/ Sub-Category	Functional Requirements
5.1.19	System & Security/ Security	<p>All uploaded files must be scanned for viruses.</p> <p>Inherently done by current process when uploading to Nolij.</p> <p>-----</p> <p>Preserve current functionality in Nolij to scan uploads sent via SFDC API.</p>
5.1.20	System & Security/ Security	<p>OSU Staff/Faculty Accounts to be created by designated System Administrator.</p> <p>Need to bulk create current staff/faculty members.</p>
5.1.21	System & Security/ Security	<p>Staff users will need access to the system with different access permissions:</p> <ul style="list-style-type: none"> - Graduate School Administrator: Configure, troubleshoot, and manage system (including user accounts) - Program Administrator (PAR): Configures Program configurable settings, manages Program users - Graduate School User: Access data, etc. - Program User: Access data, etc. - Graduate School Authorizer: has signing authority - Program Authorizer: has signing authority <p>-----</p> <p>Create corresponding Roles and Profiles with explicit object access rights (CRED).</p> <p>Program users will be granted access by default to Applications relevant to their Programs, whereas Graduate School users will have access to all Applications.</p> <p>Select users will be designated as Approvers based on their Group composition.</p>

6. SYSTEM INTEGRATION

Key communication points needed between SFDC and OSU systems (Banner and Nolij), in addition to third-party providers.

6.1. Functional Requirements

	Category/ Sub-Category	Functional Requirements
6.1.1	System Integration/ Banner	<p>Banner ERP needs to be informed of any new Applications created by SFDC. Banner ERP needs to send updates made by Graduate School to SFDC.</p> <p>Banner will remain the OSU ERP System of Record.</p> <p>It runs underlying job to identify existing Applicants and determine whether a new OSU ID is issued.</p> <p>SFDC queries Banner for changes and updates records.</p> <p>-----</p> <p>Integration based on OSU ID.</p> <p>Interface (potentially via CastIron orchestrations) will likely run 1x/day to Banner and from Banner to SF hourly. Specific details of schedule are to be determined.</p> <p>Web Service #1 to save new Application data and generate OSU ID. Web Service #2 to update existing Applications.</p>
6.1.2	System Integration/ Nolij	<p>Nolij must store all documents associated with an Application.</p> <p>Nolij will remain the OSU System of Record for documents. Most Nolij documents are converted into PDF format beforehand by an internal OSU job. NOLIJ integration must be bi-directional, since Documents can be added to NOLIJ that did not originate in SFDC, maintaining security so that Applicants can view Documents that they have uploaded and specific doc types (such as applications). Grad School should have ability to make specific documents viewable (override) to applicant.</p> <p>-----</p> <p>All references to Application documents should contain a link to the actual file stored in Nolij. Applications yet to be submitted will temporarily store Documents in SFDC until they are uploaded into Nolij.</p>
6.1.3	System Integration/ TouchNet	<p>TouchNet will continue to be used for processing payments associated with paid Applications.</p> <p>Solution must post and accept posts from OSU payment collection system TouchNet Marketplace uPay (www.touchnet.com/web/display/TN/Marketplace) .</p> <p>-----</p> <p>Replicate current interface between OSU's existing website for Admission Applications and TouchNet, to build associated integration point with SFDC.</p>
6.1.4	System Integration/ SSO	<p>Internal OSU users (Program and Committee Members/Faculty and Graduate School) need Single Sign-on authentication to SFDC based on underlying user authentication for other systems (e.g. Exchange, Banner, and Nolij).</p> <p>OSU currently testing SSO via CAS protocol with Shibboleth.</p> <p>-----</p> <p>Configure federated single sign-on using SAML for SFDC internal OSU users with Shibboleth.</p>
6.1.6	System Integration/ Email Templates	<p>Dynamic emails with variable paragraphs may involve custom programming, based on sample templates provided.</p> <p>-----</p> <p>Implement a dynamic email template solution in SFDC that would replace the current Letter of Admission process.</p>

	Category/ Sub-Category	Functional Requirements
6.1.7	System Integration/ Email Delivery	<p>Due to the large number of emails that need to be sent re: Admissions, it may not be feasible to have SFDC send out all messages.</p> <p>Average of 500-800 emails sent out per day, with up to 10K maximum.</p> <p>-----</p> <p>Configure and enable Email Relaying between SFDC and either OSU's Exchange Server or Google accounts – decision to be made by OSU when appropriate.</p>
6.1.8	System Integration/ PDF Translation	<p>Current PDF document conversion (via GhostScript and PDF Toolkit) cannot process all files.</p> <p>Seeking a new utility integrated with SFDC for PDF conversion of Documents uploaded, prior to being sent to Nolij for storage.</p> <p>Plan to continue using AppWorx job for document bundling requests with underlying GhostScript for PDF conversion.</p> <p>-----</p> <p>Render a completed Application via PDF conversion within SFDC.</p> <p>Store resulting PDFs in Nolij, with Document links in SFDC.</p>
6.1.9	System Integration/ Qualtrics	<p>Qualtrics may likely be used to conduct surveys with Applicants.</p> <p>OSU currently owns Qualtrics licenses and is currently being used to conduct student surveys.</p> <p>-----</p> <p>Create surveys for Applicant records in SFDC via Qualtrics</p>

7. DATA MIGRATION

The Data Migration discovery sessions identified what subset of historical information needs to be populated into SFDC, including both User accounts and underlying Application information.

7.1. Functional Requirements

	Category/ Sub-Category	Functional Requirements
7.1.1	Data Migration/ Application	<p>Existing Applications starting with the Summer 2013 term (June, 2013) that have previously been created under the old website application system must be replicated in SFDC.</p> <p>Approximately 4,000 existing Applications as of 1/15/2013 (from Term 201400+).</p> <p>Existing Applications on the current website must be submitted and assigned to an OSU ID, prior to pushing to SFDC.</p> <p>-----</p> <p>All current Applications (Pending and Admitted) on the existing web applicant system need to be migrated to SFDC for Applicants.</p>
7.1.2	Data Migration/ Application	<p>Past Applications for an Applicant should be referenceable in SFDC by OSU staff.</p> <p>Need to be able to automatically restore the most recent 5 years of historical Application PDFs for review by Programs (includes References, Documents, and Payments).</p> <p>Preservation of actual Question and Answer fields pertaining to Banner information for these historical Applications must also be restored.</p> <p>-----</p> <p>Create links in SFDC affiliated with an Applicant (based on existing OSU ID) to Nolij documents pertaining to Applications for the past 5 years, only viewable by OSU staff.</p> <p>Map Question and Answer fields from Banner to SFDC fields for all restored Applications.</p>
7.1.3	Data Migration/ Application	<p>Preserve information from References for active Applications that are migrated to SFDC.</p> <p>Reference data currently stored in MySQL DB.</p> <p>-----</p> <p>Import Nolij links for newly replicated Applications in SFDC re: information and Letters from current References.</p>
7.1.4	Data Migration/ User Account	<p>Need to provide seamless transfer from existing Web Applicant system to SFDC portal for current Applicants and References.</p> <p>Ideal user experience to auto-generate a new SFDC account in real-time when an Applicant returns to the OSU online admission link (after the transition to SFDC), in lieu of sending out new SFDC credentials in bulk during a nightly batch process.</p> <p>-----</p> <p>Provide URL redirect on existing website to new SFDC portal login page for seamless transition and access, with message indicating that their old Login ID is needed to issue them a SFDC Username for the new portal.</p> <p>Automatically create a SFDC portal account and send credentials to Applicants and References affiliated with current Applications.</p> <p>Current Applications migrated into SFDC need to be matched with Applicants based on their OSU ID.</p>

8. CHANGE MANAGEMENT

Change management plan.

8.1. Functional Requirements

	Category/ Sub-Category	Functional Requirements
8.1.1	Change Management/ Deployment	Deployment plans are well defined and approved prior to the deployment date
8.1.2	Change Management/ Perceptions	<p>From the perspective of the academic program changes (transitions) should be smooth and successfully implemented and should be accompanied by the perspective that the changes will have lasting benefits</p> <p>-----</p> <p>A defined, repeatable plan for engaging, eliciting requirements, performing customizations, providing training and measuring short and long term success for each academic program should be defined and vetted.</p>
8.1.3	Change Management/ Perceptions	<p>Project transparency is important to project stakeholders.</p> <p>-----</p> <p>A communication plan must be defined including methods to communicate changes in project scope, schedule and process.</p> <p>Status reports should be delivered no less than once per week and include (at a minimum): progress, progress barriers, measures OSU could take assist project</p> <p>The plan should (at a minimum) contain the following elements: communication objectives, target audiences, key content for the communications, communication method and frequency.</p>
8.1.4	Change Management/ Project Management	There is significant risk involved in the blended team approach, that risk is magnified when the teams originate from different operating worlds (public academic/private business). To mitigate this risk, mechanisms should be defined to manage expectations, verify communication understanding, issue identification and resolution.
8.1.5	Change Management/ Project Management	<p>Project Governance must be identified and defined</p> <p>-----</p> <p>The roles, responsibilities (including authority) from each team must be defined and meetings scheduled.</p>

EXHIBIT E
ITEMIZED ENGAGEMENT TIME AND COST ESTIMATE

Proposers must use the following worksheet to enter engagement time and cost estimates.

Proposals should be based on the project scope in Exhibit D. However, OSU will expect a certain amount of flexibility during the course of the project development such that the Proposer will be willing to hand off specific development efforts (such as integrating a particular 3rd party app, for example) to OSU, as is deemed by the Proposer and OSU to be appropriate, reasonable and would not negatively impact the project timeline, quality or budget.

	HOURS	AVERAGE HOURLY RATE	COST
PROJECT MANAGEMENT			
REQUIREMENTS & PROTOTYPING DEFINITION			
INITIAL CONFIGURATION/DEVELOPMENT			
DATA MIGRATION			
SYSTEM INTEGRATION			
TESTING			
PRODUCTION DEPLOYMENT			
TRAINING			
TOTAL COST			

	HOURLY RATE
POST-IMPLEMENTATION SUPPORT/CUSTOMIZATION	