
Portland State University

Request for Information (RFI) #19221:

Enterprise Research and Administration (eRA) Solution



Portland State University

Portland, Oregon

February 10, 2012

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Important Notices

Responsibilities for Each Vendor Participating in the Proposal Process

Portland State University (PSU) requests that all potential respondents refer daily to the OUS Procurement Gateway website (<https://secure.ous.edu/bid/>) to check for any available amendments or addenda, responses to inquiries and/or questions, cancellations, and any and all additional information regarding this posted Request for Information (RFI). The web link is PSU's official process for notification to potential respondents.

All respondent questions and inquiries must be sent by email to the contact person listed below. The subject line of the email must state the following: "RFI for Electronic Research and Administration (eRA) Solution." Any questions and inquiries that are not so submitted and identified may not be responded to in a timely manner.

Submission of RFI Responses

Submission Deadline: March 2, 2012, 11:00 AM (Pacific Time)
Submission Medium: Email Only
Email Address: ellis@sigcorp.com
Contact Person: Dr. Samuel Ellis
Senior Executive, Client Services
Strata Information Group
Phone: 503-720-7207

The submission of RFI responses includes two mandatory components. First, there is the satisfactory completion and submission of material that is referenced in the Appendix A of this document. Second, there is the satisfactory completion and submission of data that is gathered online via DecisionDirector® (and described later in this RFI).

PSU's Contact Person for Vendor Communication

On behalf of PSU, the contact person for vendor communication is Dr. Samuel Ellis. He can be reached at ellis@sigcorp.com or 503-720-7207.

Equal Opportunity

PSU promotes equal opportunity for all individuals without regard to age, color, disability, marital status, national origin, race, religion or creed, sex or gender, sexual origin, or veteran status.

Trade Secrets and Oregon Public Records Law

If your response contains any information that is considered a "trade secret" under ORS 192.501(2), the Responder must mark each sheet of such information with the following legend:

"This data constitutes a trade secret under ORS 192.501(2), and shall not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."

The Oregon Public Records Law exempts from disclosure only bona fide trade secrets, and the exemption from disclosure applies "unless the public interest requires disclosure in the particular interest" ORS 192.501(2). Therefore, non-disclosure of documents or any portion of a document submitted as part of a response may depend upon official or judicial determinations made pursuant to the Public Records Law.

The above restriction may not include cost or price information, which must be open to public inspection. An entire response marked as proprietary ("trade secret") is unacceptable. The Responder will be requested to mark only specific pages or text and return the response prior to closing. Responses in which the entire document is marked or otherwise identified in its entirety as confidential or a "trade secret" will be rejected as non-conforming.

Please note that information sent electronically may not be secure, and that PSU assumes no liability for information that in any way becomes a part of the public domain prior to receipt of any email.

Contact Persons. Please list the name(s), address, telephone numbers, and email address of all persons we may contact if we have questions regarding your Response.

Response Date. Responses must be received not later than the date and time specified on the cover page. This is not a bid or proposal solicitation.

Ownership and Costs. Ownership of all data, material, and documentation originated and prepared for PSU pursuant to this RFI will belong exclusively to PSU. Any costs in the preparation of your Response, including cost and expenses for site visits, are entirely your responsibility.

Conditions and Limitations. This RFI does not represent a commitment or offer by PSU to enter into an agreement with the Proposer or to pay monies or costs incurred in the preparation of a response to this request.

Caution to Proposers. PSU is not responsible for locating or securing any information that is not identified in the RFI and reasonably available to PSU. Proposers are encouraged to ask questions to clarify items in the RFI that may need clarification.

Request for Information (RFI):
Enterprise Research and Administration (eRA) Solution

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Request for Information (RFI):

Enterprise Research and Administration (eRA) Solution

A. Introduction

The purpose of this document is to invite vendors to provide information about enterprise research administration (eRA) products and services. Such information will help guide the institution's decisions about supportive information technology that should be acquired and implemented.

B. Profile of Portland State University

PSU traces its roots to the Vanport Extension Center. It was established in 1946 to help satisfy the higher education needs of World War II veterans. Gradually, within the Oregon University System, PSU grew to become one of the nation's most vibrant urban institutions. The University serves approximately 28,000 students in 213 undergraduate/graduate programs. PSU employs 3,868 dedicated faculty and staff.

The University is often recognized as an urban research-sharing institution (along with the University of Memphis, the University of Illinois at Chicago, Cleveland State University, and the University of Alabama at Birmingham). *The Princeton Review*, *U. S. News and World Report* and other publications frequently cite the strength of PSU's academic programs, including business administration, urban and public affairs, engineering and computer science, sustainability and environmental studies, and education.

PSU is located on 49 acres of land in downtown Portland. The institution's motto, "Let Knowledge Serve the City," is a clear statement about how the University views its position within the region. Without sacrificing its commitment to teaching, learning, and service, PSU is increasingly growing itself as a research institution.

The University is challenged in several respects. Most significantly, financial support from the State of Oregon entails considerable uncertainty. It is hard for PSU to address either strategic or tactical needs when its funding is unclear. Additionally, PSU's physical campus is rather bound; it is not always easy for the institution to build new facilities to accommodate increased enrollment, modernize learning spaces, etc. As a result, research and research funding are increasingly important to PSU's vitality and growth.

PSU is a vibrant institution with many opportunities. It continuously pursues qualitative growth in its academic programs, research activities, services, collaboration with partners, and stature as an institution of higher education.

A substantial amount of information about PSU can be found at www.pdx.edu/about-portland-state. The website provides considerable insight into PSU's academic programs, mission, values, campus themes, support services, etc.

C. RFI Instructions and Requirements

1. One electronic copy of the vendor's RFI response shall be received via email no later than 11:00 AM local time on March 2, 2012. Late submittals shall not be considered. RFI responses must be in the form of a *single* MS Word® or Adobe PDF® file. Vendors must *not* submit multiple electronic files. No hardcopy materials are requested or desired.

Vendors' RFI responses shall be sent via email to Dr. Samuel Ellis. His contact information is given below:

Dr. Samuel Ellis
Senior Executive, Client Services
Strata Information Group
ellis@sigcorp.com
503-720-7207

2. In addition to the content that is submitted relative to Appendix A, it is a mandatory requirement for vendors to submission data that is gathered online via DecisionDirector®. Advantiv Solutions will provide all interested vendors with access to DecisionDirector®. Such access can be arranged by emailing Advantiv Solutions (dd2@advantiv.com).
DecisionDirector® is being used to gather information about the extent to which vendors' software products address the system features that PSU desires (but not necessarily requires) in its chosen solution.
3. *All vendors shall use Dr. Samuel Ellis as a sole point of contact for all communication throughout the entire RFI process. Vendors shall not, under any circumstance, contact (directly or indirectly) any person within PSU.*
4. Each vendor will identify a single point of contact for all matters during the acquisition process.
5. RFI responses shall conform to the format presented in the Appendix.
6. RFI responses may be withdrawn by a vendor prior to 11:00 AM local time on March 2, 2012 but not thereafter.
7. Vendors are entirely responsible for any expenses that are associated with their RFI responses. PSU shall have no responsibility.
8. PSU reserves the right to perform whatever research it deems appropriate in order to assess the merits of any vendor's RFI response. Such research may include, but is not necessarily limited to, discussions with outside consultants, interviews with the vendor's existing clients, and analyses of industry reports.
9. PSU reserves the right to seek clarifications and follow up information from vendors.
10. In the event of litigation, the related matters shall be governed by and construed in accordance with the law of the Oregon. The venue shall be with the appropriate state or federal court located in Multnomah County, Oregon.
11. By submitting an RFI response, the vendor warrants that the proposed products and services comply with the accessibility requirements of Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794(d)) and its implementing regulations. Vendor agrees to make the requirement applicable to any and all subcontractors.
12. All vendors' questions about this RFI shall be submitted in writing to Dr. Samuel Ellis via email (ellis@sigcorp.com) no later than 11:00 AM local time on February 20, 2012.

13. Each submittal shall be signed by the vendor with his/her usual longhand signature, and by a person who has the legal authority to bind the vendor in all relevant matters. When requested by PSU, satisfactory evidence of the authority of all those who signed the proposal shall be furnished.
14. By submitting an RFI response the vendor agrees that it shall not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status or sex. The vendor shall take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during their employment without regard to their age, race, creed, color, national origin, ancestry, marital status or sex. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The vendor agrees to post in a conspicuous places, available to employees or applicants for employment, notices to be provided by their supplying officer setting forth the provisions of the nondiscrimination clause; the vendor, where applicable will in all solicitations or advertisements for employees placed by or on behalf of the vendor, state that all qualified applicants will receive consideration for employment without regard to their age, race, creed, color, national origin, ancestry, marital status, or sex.
15. The vendor shall comply with all federal, state and municipal laws and regulations including but not limited to those concerning equal employment opportunity, employment eligibility under the Immigration Reform and Control Act of 1987, safety, and wage and hour, regardless of race, religion, color, age, sex, marital status or national origin. The vendor further represents that all services provided hereunder shall comply with the Occupational Safety and Health Act as amended, including all regulations adopted pursuant thereto and in effect at the time of service.
16. By submitting an RFI response, the vendor certifies that its submittal is made without collusion or fraud, and that they have not offered or received any inducement, or kickback in connection with the RFI.
17. Schedule of Events:

Event	Date/Time
Release of RFI	February 10, 2012
Deadline for Vendor Questions about the RFI	February 20, 2012, 11:00 AM
Deadline for RFI Responses	March 2, 2012, 11:00 AM
Deadline for Online Responses to List of System Features	March 2, 2012, 11:00 AM
Selection of Vendors for Scripted Onsite Demonstrations	Approximately March 20, 2012
Onsite Scripted Demonstrations by Selected Vendors	Approximately April 9 – 13, 2012
Solicitation of Proposed Pricing from Selected Vendors	Approximately April 9 – 13, 2012
Completion of a Contractual Agreement with the Successful Vendor	TBD
<u>All vendors should take immediate steps to ensure their ability to meet all of the dates/times associated with the above schedule.</u>	

D. Mandatory Requirements

PSU will not consider a vendor's solution unless it meets all of the following mandatory requirements:

1. The vendor's solution includes support for pre-award, post-award, and research compliance management functions.
2. The vendor offers a reasonable strategy that enables pre-award, post-award, and research compliance management functions to be incrementally implemented as the University decides to use such functionality.
3. A track record of successfully completing the deployment of the proposed solution in production environments.
4. The solution includes a demonstrated strategy for integration with SunGard Higher Education Banner®.
5. The solution works on a variety of client hardware and system software platforms, including PCs, Apple Macintoshes®, MS Windows®, OSX®, iPad®, etc.

E. Characteristics of the Desired eRA Solution

The University's desired eRA solution entails a number of characteristics. Below, is information that describes PSU's expectations.

It is very important to note that none of the expectations represents a requirement. Rather, the University is trying to illustrate some of its thinking about a desired eRA solution. Certainly, after PSU understands more about vendors' products it will reconsider its expectations.

1. Support for Critical Outcomes

- a. Double research funding within five years
- b. Grow research funding to \$100K per year for every faculty FTE
- c. Ensuring that PSU is in the top quartile of the Urban 21 with respect to research funding
- d. Substantially increase the satisfaction of the faculty with respect to internal processes for the submission and management of research proposals
- e. Double the number of research projects with strategic regional partners within three years

2. Support for Key Business Objectives

- a. Simplified, end-to-end business processes
- b. Drastic reduction in the number of paper-based tasks
- c. Use of electronic workflow and approval queues to streamline tasks and enable tracking of task completion
- d. Access to electronic documents, including all versions, a history of modifications, etc.
- e. Reduction in the layers of approval for research proposals, purchasing, hiring, travel, etc.
- f. Seamless integration with Banner®
- g. Prompt encumbrance of funds in Banner®
- h. Elimination of the University's existing "shadow systems" (e.g., MS Excel®, FileMaker Pro®)
- i. User-friendly reporting tools and techniques

3. Support for Data Capture, Management, and Reporting Functions

- a. PSU desires a solution that enables data to be captured about Principal Investigators (PIs) and other personnel from Banner® HR, as well as data that is directly input to the eRA system. Such data will be used by the eRA system for proposal and budget development, research integrity purposes, award management, and reporting. Data elements include such items as name, position number, rank, salary rate, department, PI status, etc.
- b. The eRA should support the use of electronic grant files (e.g., proposals, awards, budgets, correspondence, invoices, subcontract tracking, cost share tracking, closeout documentation, etc).
- c. Ideally the eRA will enable the creation of data/files that can be exported and uploaded into Banner® (e.g., Journal Vouchers).
- d. PSU desires a solution that enables data to be imported from other systems.
- e. The system should record training and compliance requirements and provide "alerts" to the PIs when such items are due.
- f. The system should be able to produce reports about proposal and award activity by individual, department, college, and entire University. The reporting tool(s) should be able to produce ad-hoc reports for a variety of purposes, as well as have a number of standard reports. Additionally, the reports should be viewable and savable in a variety of formats (e.g., MS Excel®, Adobe PDF®) and viewable on a variety of devices (e.g., PCs, Apple Macintoshes®, mobile devices, etc.)
- g. With respect to financial conflict of interest, it is desirable for the solution to address the following items:
 - Ability to identify all PIs with current external funding proposals
 - System sends an annual reminder email to such PIs that Financial Conflict of Interest (FCOIR) form is due
 - PI able to complete form online or automatically upload it
 - PI able to update own FCOIR status to "No current research" when research is completed
 - System logs status of FCOIR (e.g., no current research, pending, satisfied, needs management plan, or completed management plan)
 - Central administrative staff able to change and update FCOIR status as needed
 - System sends reminder emails for outstanding forms
 - System can identify PIs and the specific accounts that should be frozen in cases of noncompliance
 - System can route FCOIR forms to specific staff members when needed

4. Support for a Hypothetical Proposal Development Use-Case Scenario

- a. A Principal Investigator (PI) identifies a grant opportunity (e.g. NSF, NIH, State of Oregon) generated from within the eRA solution or some other source.
- b. She quickly finds the "proposal process" information on PSU's Research and Strategic Partnership (RSP) portal.
- c. The PI creates a new record with basic information (e.g., submission deadline) in the eRA system to notify RSP that a proposal is in development.
- d. The PI enables access to the record for another faculty member at PSU who is serving as a co-PI so that there is shared responsibility for developing the proposal and viewing all proposal elements in the eRA system.
- e. The PI begins developing the proposal in the eRA solution. Such a process should include the system's ability to provide alternate paths for proposal creation (e.g., starting the proposal outside the system and uploading files into the eRA solution, drafting an informal proposal).
- f. The PI drafts a budget in the eRA solution using a standard budget template and coding scheme.
- g. The PI uploads relevant documents required for the proposal
- h. A Departmental Research Administrator updates the proposal as a proxy for the PI.
- i. The PI develops a detailed budget using the eRA solution to calculate salary costs based on access to salary and fringe benefits rates for PSU personnel. Details for other expenses necessary for the project are added, including the appropriate overhead rate.
- j. The budget that is developed in the eRA solution can include both the funding request as well as a detailed listing of cost sharing commitments from PSU as well as external sources.
- k. Based on several completed items on the proposal, an automatic notification is sent to support staff in RSP and other offices as needed.
- l. A member of the RSP staff accesses the proposal and provides feedback in various forms (e.g., "post-it note," e-mail, comments on a document) to the PI.
- m. The system keeps a record of the changes made to a document and enables the user to see the history of all such changes.
- n. The PI, in an iterative manner, returns to the eRA solution and adds additional details to the proposal.
- o. The PI (or his/her proxy) updates the PI's biographical sketch that is stored in the system; there is an ability to use such a sketch in multiple proposals.
- p. When the proposal is ready for review, the PI indicates such a condition in the eRA solution (i.e., status change).

5. Support for a Hypothetical Proposal Review Use-Case Scenario

- a. Based on the "status" change mentioned in the previous use-case scenario, the proposal is automatically routed via an electronic workflow to reviewers (e.g., academic department chair, dean) in either a parallel or sequential manner. In the case of a contract, there are options to adjust the paths within the workflow.
- b. The eRA solution captures information about the project activity to facilitate proposal activity reporting including the ability to track percentage of credit for different investigators and information to initiate actions at award acceptance including triggers to the research compliance module and post award module and other institution-defined triggers.
- c. Upon receiving "Ready to Review" notification, reviewer(s) review the proposal and provide feedback to the PI via the eRA solution.
- d. The RSP Office, via a "dashboard" within the eRA solution, is able to monitor the progress of all proposals in the pipeline. There is clear information about upcoming submission deadlines, proposals by academic department, success rate, etc.
- e. If proposal remains in an incomplete state for more than a user-specified time (e.g., x days), electronic alerts are automatically sent to user-specified people.
- f. For each proposal, based upon the submission deadline, electronic alerts (e.g., deadline minus x days) are automatically sent to user-specified people about the upcoming deadline.
- g. The PI revises the proposal and forwards it to the RA via the eRA solution.
- h. The RSP Office reviews the final proposal and electronically submits it to the sponsor directly from the eRA solution.
- i. All components of the proposal can be consolidated into a single electronic file and extracted/printed from the eRA solution

6. Support for a Hypothetical Award Notification and Acceptance Use-Case Scenario

- a. The agency reviews the proposal and replies with accepted, rejected, or revision requested.
- b. The eRA solution is updated to indicate agency's response and documentation of response (e.g., award letter, draft agreement).
- c. Designated parties within the University are electronically notified of the agency's response.
- d. The eRA solution captures "just-in-time" data if needed by sponsor prior to award. The PI uploads information to eRA solution for review and submission to sponsor
- e. An award record is automatically created in the system using proposal data and entry of additional award-specific data elements. If an award differs from its proposal, data elements such as performance period, budget, and cost share commitments are updated. Data elements that differ are flagged for review by the PI. If necessary, the PI makes required changes to the project (e.g., scope of work, budget) and submits them through the system for internal review and subsequent submission to sponsor.
- f. The system captures and date stamps communications related to proposal/award changes (e.g., negotiation of budget/award amount changes, contract negotiations, prior approval requests to sponsor). Communications can include email correspondence or notes entered into the system.
- g. Award documents with terms and conditions are submitted to PI for approval prior to acceptance.
- h. When the award is accepted, institution-specified data including a final budget is electronically loaded into Banner®.
- i. The agency's terms and conditions and special requirements (e.g., FATA or other compliance reports) are entered in the eRA solution.
- j. Electronic notifications are automatically triggered about next steps (e.g., a status change prompts the PI to take certain kinds of action).
- k. Automatic electronic notifications are sent to various offices across the campus informing them of upcoming subcontracts, equipment purchases, hires, etc.
- l. A change in Banner® (e.g., budget adjustment) triggers an automatic electronic update in the eRA solution.

7. Support for Potential Post-Award Functions and Processes

- a. Load encumbrances/expenses/budget modifications from Banner® into the eRA solution for viewing expenses, burn rates, remaining balances, etc.
- b. Interface with a document management system so that files (e.g., images of hardcopy documents) can be referenced. For example, the University desires an eRA solution that enables scanning of documents with information about equipment expenditures made in conjunction with a grant.
- c. Track and consolidate cost sharing contributions from various sources including Banner® cost share indexes, associated facilities and administration (F&A) calculations, foregone F&A, third-party reports, tuition waivers, etc.
- d. Track institutional exceptions and special requirements.
- e. Load the relevant billing and payment data from Banner® into the eRA solution.
- f. Provide documentation and routing of cost transfer justifications for both retroactive labor changes in Banner® and journal vouchers, including notification of approval.
- g. Track sub-award information and activity including sub-recipient activity.
- h. Track and monitor the committed effort of PIs and key personnel in proposal budget against the effort charged to projects in Banner®
- i. Provide automatic closeout notifications to the PI, RSP staff, and others about all required closeout actions/tasks.
- j. Process award amendments, prior approval requests, and no-cost extensions.
- k. Track completion of compliance, reporting, and closeout requirements
- l. Load financial data from Banner® for numerous award management purposes and enable the following:
 - Ability to view salary and fringe encumbrances that are calculated for entire project period
 - Real-time (or as frequently as possible) feed of payroll encumbrances either to/from Banner®
 - Ability to encumber F&A with real-time recalculation based on the entry of purchase orders and labor distributions
 - Ability to track unencumbered commitments (e.g., vendor orders, internal expenses before they are processed through Banner®
 - Ability to make projections and create reports using past expenditure data and/or burn rates and potential future expenditures or changes using multiple forecasting scenarios (e.g., projections by manipulating the current labor commitments -- by people, dates, effort, etc.)

8. Support for Research Compliance Management

- a. The actions described below should be able to communicate with one another in such a way that they may run reports, be accessed by specific committee/staff members, and automatically update changes in information across databases. The eRA solution should alert the PI to the need for addressing research compliance issues in the pre-award stage. Upon receiving the award, the eRA solution should generate automatic notices to the PI to complete the necessary research compliance documents.
- b. For the Institutional Review Board, Institutional Animal Care and Use Committee, Radiation Safety Committee, and Biosafety Committee the eRA solution should:
 - Enable a PI to either enter data into an online application or upload application materials
 - Identify specific data elements (e.g., vulnerable human subject populations, species of animal) and access a subset of questions and store specialized information related to such data elements
 - Enable RSP staff access to the application and data entry logs
 - Electronically route the completed application to specific committee reviewer(s) upon submission of the completed application
 - Enable logging of reviewer comments (e.g., ad-hoc notes, online edits) for electronic routing back to the PI
 - Enable the PI to respond to comments and online revisions of the application
 - Enable RSP staff to finalize the approval of the application
 - Create and send an official electronic approval memo for the PI
 - Auto-copy department chairs/graduate studies staff with electronic approval memos
 - Determine when continuing review reminders are needed and send reminders to PIs and review committee members when appropriate
 - Enable PIs and/or RSP staff to archive files within system
 - Enable PIs and/or RSP staff to archive files outside of the system
 - Provide the ability to track award-specific responsible conduct of research training and completion requirements for project personnel
 - Provide reminders when project personnel training will expire and renewed training is required
- c. For chemical hygiene the eRA solution should:
 - Enable a PI to enter data or upload materials into the system
 - Track chemical hazards associated with a project and the location of the lab/facility where they are housed and used

9. Support for Miscellaneous Functions

- a. Research administration:
- An ability to assign codes for grants and contracts (e.g., status, grant type).
 - An ability to track the status of proposals -- both pre-award and post-award.
 - An ability to generate task-oriented pipeline reports for PIs, RAPs, deans, et al., with information about important deadlines, action items, dependencies, etc.
 - An ability to generate summary pipeline reports that aggregate the work of all PIs.
 - An ability to pinpoint short-term activities that require immediate attention.
 - An ability to escalate particular contacts/activities for immediate attention.
- b. An ability to add notes to a grant, including a discussion of security and data sharing rules.
- c. An ability to add private notes to a grant record, including a discussion of security and data sharing rules.
- d. An ability to attach a variety of files (e.g., MS Word®, .pdf, .jpeg) to a record.
- e. At least two different examples of how “dashboards” are used to help manage specific situations and the associated notifications.
- f. An ability to maintain and display a history of communications and updates for grants, including time/date stamps.
- g. An ability to download eRA data into MS Excel®.

F. Related Questions and Topics

1. Provide a two-page summary of the implementation strategy associated with the proposed solution, including information about the following:
 - a. Baseline system installation
 - b. Functional implementation and training
 - c. Interoperability/integration with Banner®
 - d. Technical training
 - e. System testing and quality assurance
2. If the eRA solution is to be hosted by PSU, what server platforms can be used in conjunction with the proposed system? How should such platforms be sized? What operating systems and relational database management systems are supported?
3. At a high level, what is the architecture of the proposed solution? How are various components (e.g., servers, databases) arranged? If the proposed solution is hosted by the vendor, how does PSU best integrate its internal systems (e.g., Banner®).
4. Describe all interfaces (e.g., APIs, message brokers) that are needed or available for Banner® integration.
5. Provide a suggested implementation schedule, including major milestones.
6. Provide information about the internal functional and technical staffing requirements that PSU may encounter with the proposed system.
7. Explain how security is enforced for access to various applications and data.

Appendix: Required Format for RFI Responses

Section 1: Cover Letter

Provide a two-page cover letter that summarizes the RFI response.

Section 2: Vendor Profile

Provide the following information:

- Name of vendor's company
- Vendor's mailing address, telephone number, FAX number, and web site address
- Primary contact person's name, title, mailing address, telephone number(s), FAX number, and email address
- One-page overview of the vendor's company, products, and services.

Section 3: Vendor's Understanding of the RFI

Provide a statement that acknowledges the vendor's understanding of the "RFI Instructions and Requirements" as presented in this RFI. Additionally, declare any and all exceptions that your company might have with respect to such instructions and requirements.

Section 4: Products

- Identify all required products (e.g., application software, system software).
- Identify all optional products that PSU must/should consider.
- Briefly summarize the features, functionality, and characteristics associated with each required/optional product.

Section 5: Mandatory Requirements

Briefly explain how the proposed solution addresses each of the items within the "Mandatory Requirements" section of this RFI.

Section 6: Characteristics of the Desired eRA Solution

Briefly explain how the proposed solution addresses each of the items within the "Characteristics of the Desired eRA Solution" section of this RFI.

Section 7: Related Questions and Topics

Briefly explain how the proposed solution addresses each of the items within "Related Questions and Topics" section of this RFI.

Section 8: Vendor Strength and Track Record of Success

- Describe the vendor's corporate history, market segment(s), client base, employee base, research and development programs, and financial well-being.
- Identify at least three client references (i.e., name of institution, contact information for a senior executive) who can speak to the qualifications of the vendor. Ideally, each such institution will be a user of Banner®.
- In no more than five pages, please provide at least three case studies that describe successful document imaging solutions. Ideally, such case studies will align with the circumstances of PSU.
- Provide documentary evidence of the vendor's long-term financial well-being.

Section 9: Additional Information

Provide any additional information that PSU should consider in its evaluation of RFI responses.