



ADDENDUM

SOLICITATION NO.: JD176020P

SOLICITATION NAME: CAMPUS IDENTIFICATION (ID)
CARD SYSTEM & POINT-OF-SALE (POS) SYSTEM

ADDENDUM NO.: 1

DUE DATE AND TIME: FEBRUARY 23, 2016 3:00 PM PT

DATE: FEBRUARY 15, 2016

PROCUREMENT ANALYST: JAMES FIGGINS

The solicitation named above is hereby modified as follows:

1. RFP JD176020P, change Proposal Due Date and Time
From: February 17, 2016 4:00 pm PT
To: February 23, 2016 3:00 pm PT
2. RFP JD176020P, Section 3.A.6)B.; Change "Is compatible with commercially available card readers". To "Is compatible with commercially available card printers".
3. RFP JD176020P, Section 3.A.13) A.; Add "Proposer should provide a quote for one new kiosk."
4. RFP JD176020P, Section 3.B.3) A.; Change "Exhibit E" to "Exhibit D".

The following questions were received with regard to the solicitation named above. OSU has provided answers below to each question, but the RFP or contract documents have not been modified as a result.

Solicitation Process/Contract Questions:

1. **Question:** In the RFP, it requests that we use the format in the RFP to provide the response. Is it possible for you to post a Microsoft Word version of the RFP or just the response portion of the RFP for us to use so we can enter response content?
Answer: OSU will not be providing a Work version. OSU requests that your responses follow the flow as stated in section 5.02 required submittals. This allows the determination or Responsiveness and the evaluation stage to be performed more efficiently.
2. **Question:** Is an email only submission an acceptable form of submission?
Answer: Yes.
3. **Question:** If we are not submitting a cloud based offering, then we do not need to fill out Exhibit D, correct?
Answer: Correct.
4. **Question:** Section 4.01 states that the minimum qualifications are 10 colleges/university clients. As we discussed prior to the release of the RFP, we do not have 10 or more colleges/university clients but we do have a university using the solution in addition to other commercial retail and hospitality clients. Does this mean we should not respond or will an exception on the minimum criteria be allowed?
Answer: As stated in section 4.01, Proposers must meet the Minimum Qualifications to be determined a Responsive Proposer. OSU will not be relaxing the Minimum Requirements.

Addendum 1 JD176020P

5. **Question:** Will a version of the Sample Contract need to be signed in verbatim? If so, we may wish to discuss in more detail the proposed payment schedule and Contract acceptance language.
Answer: The Contract does not need to be signed and sent in with the proposal. Per Section 6.03, Contract language may be negotiated with the highest ranked Proposer or all Responsive Proposers. Also, please note the paragraph below titled Contract Award, that OSU may rescind its award if Contract negotiations are not successful.
6. **Question:** Regarding Section 3.C of the Contract, does that include travel related expenses for proposer Implementation Consultants?
Answer: It does not include expenses identified in a Proposal, or future expenses reviewed ahead of time and accepted by OSU.

Campus Identification Card System (Number designates location in the RFP Documents)

7. **Question: Campus identification Card System 5):** Does admin level refer to a campus employee/manager, or the actual student user?
Answer: Refers to campus employee/manager.
8. **Question: Campus Identification Card System 7):** Does OSU want to replace the current OSU DataCard printers? If so, how many will you replace?
Answer: OSU is not including card printers in this RFP.
9. **Question: Campus Identification Card System, 9):** A. Can configure multiple transaction discounts for custom specified plans, locations, and/or activity types. B. Will allow discounting by multiple types: plan, location, patron type, and range, on a schedule..... Can you provide some examples for how discounts are to be applied? Including how they are included in reporting?
Answer: One stored value plan available to all patrons that applies a discount based on the location of the transaction, or the number range of the card, or on a schedule. For example, I'm a student with one stored value plan on my patron account. I get no discount at the library for copies (based on patron type), I get a 10% discount at a convenience store (based on location), but no discount at the same location before 5pm (based on time of day). I might also be blocked from making any transactions at the bookstore based on my card number being in a specific range.
10. **Question: Campus Identification Card System, 10):** Please define "differing uses and configurations". Perhaps provide a couple of examples.
Answer: Differing uses and configurations refers to the flexibility to set up a variety of vendor locations from OSU owned and operated food locations to vendor owned. The card system should also allow the flexibility to handle a wide variety of locations types from print/mail to food.
11. **Question: Campus Identification Card System, 11):** A. Work with mobile devices (Apple, Android) and PCs (web based). B. Read magstripe, RF, barcode, or manual entry (name or ID number. Please clarify, are these desired capabilities with respect to attendance tracking reader (i.e. the device(s) to capture the cardholder's card number(s)?
Answer: Yes. We would like attendance tracking software to work on a variety of hardware types , android, iOS, and web. We would also like a tracking system that can control more than one number type. For example, if we read a prox number into the software, can it be translated to a standard ID number?
12. **Question:** Allows for the selection of patron "pass Backs" from one, to no limit, and everything in between. Please clarify by use of an example(s)?
Answer: For one event, each patron may only receive one ticket and will display as ineligible (or similar) if they try to obtain a second ticket before the event is closed. For a different event, each patron may visit an

Addendum 1 JD176020P

advising office four times over the course of a term, but will display ineligible (or similar) after the fourth visit. For a different office, there is no limit to the number of visits.

13. **Question:** Please expand or provide an example of “Changes between different priority lists at the POS based on location, type of purchase plan being used....”

Answer: For example, if a patron with multiple plans on his/her account makes a purchase at a merchant location that accepts some of these plans, but not others, the card system should provide a method for the correct plan to be charged at the time of the transaction.

14. **Question: Campus Identification Card System, 11.b):** “Allow users to set up and control event parameters”. What types of parameters are you referring too?

Answer: For example, when an event begins/ends, what patrons are eligible for the event, which has access to record attendance for the event, etc.....

15. **Question: Campus Identification Card System, 13):** Regarding vending machines, what is the current technology for vending, both front end and back end? What credit card processor is currently being used to process transactions on campus?

Answer: Current card system vendor provided sundries vending machine, with transactions being handled exclusively by the card system vendor. Credit card purchases are not available on this machine. This machine is associated in no way with the beverage vending machines on campus. Current processor is Touchnet, Merchant Link.

16. **Question: Campus Identification Card System, 13)A.:** This sounds like a kiosk or value transfer station. Is this correct? Does OSU have existing kiosks on campus? If so, are they proprietary devices? If so, does OSU want us to quote new kiosks? How many?

Answer: Yes, it is anticipated that this would be a kiosk that would dispense system cards and allow for deposits (cash and/or credit) to be made to the dispensed card or cards belonging to system patrons (e.g. students, faculty, staff, etc....). OSU currently has one such kiosk on campus. This kiosk is proprietary. Please provide a quote for one new kiosk.

17. **Question: Campus Identification Card System, 13)B.:** Please clarify what are non-ID card system patrons? Departments? Public? Does OSU have existing copy readers and/or print release stations currently? If so, what is the make and model? As recommendations for new print/copy readers is gated by size, can OSU provide approximate numbers of copiers and printers on campus?

Answer: Non-ID card system patrons are members of the public. OSU currently has five existing copy/printer readers. There is a large installed base of existing copiers across campus, but only five machines are tied directly into the card system. It is not anticipated that the card system will be used for anything other than these five copiers.

18. **Question:** What are the makes/models of the 4 copiers that will have the card readers?

Answer: Ricoh MP2851.

19. **Question:** A proposer will be quoting a Value Plus Reload Station. Does OSU desire the use of credit cards on this machine to make deposits?

Answer: Credit card processing is desired on this device.

20. **Question: Campus Identification Card System, 13)A&C.:** Please clarify the difference between 13.C & 13.A.i?

Answer: 13.C is describing a vending machine for selling office supplies. 13.A.i is describing a kiosk for dispensing cards and adding funds to existing cards.

21. **Question: Campus Identification Card System, 13)D.:** Please clarify what is meant by hardware changes? Do you mean vending reader hardware? What vending readers are currently installed (make and

Addendum 1 JD176020P

model)? What tenders does OSU to support (campus card, credit/debit card, e-pay, and cash)? Who does OSU use as a beverage service provider? Who does OSU use as a snack service provider?

Answer: Ideally, the card reading hardware (used for credit cards) currently installed on the vending machines will also read card system cards and complete the transaction (make the payment) from the card holder's system account. Hardware currently installed on vending machines is owned and operated by a third party vendor. As required by OAR, vending machines are provided and serviced through the Oregon Commission for the Blind. Ideally, the card system vendor would have the ability to piggy back on the existing infrastructure and payment made through the card system. OSU's beverage provider is Pepsi.

22. **Question: Campus Identification Card System, 14)** Does this mean off campus merchants? Or vending machines? Or both.

Answer: This means off campus merchants – not vending machines.

23. **Question: Campus Identification Card System 15):** What version of Micros is being used on campus that requires integration?

Answer: The current version of Micros 9700 HMS, version 4.0

24. **Question: Campus Identification Card System, 15)A.:** Is this what you want primary pricing to be on or on replacing the Micros machines?

Answer: The pricing should be for the replacement POS system unless the proposed system is Micros.

25. **Question: Campus Identification Card System, 15)D.;** Please provide some use cases (examples) for how this system is used and what information from the card system is required to be shared with this system? Does this system expose a web service for integration?

Answer: The current interface pushes inventory depletion and item pricing. The output for the POS system is a CSV that is ingested by Eatec. An Automated daily CSV report may be the easiest solution.

26. **Question: Campus Identification Card System, 15)E.:** What mobile parking plan and print solution is currently in place?

Answer: The current parking system is AIMS. The campus print solution is PaperCut.

27. **Question: ID Card System Pricing –** What are you currently using for card production? Software and hardware information is not given though replacement is also asked for but won't be included in the initial proposed price scoring calculation?

Answer: OSU currently uses CBORD CS Gold version 6, which interfaces with ID Works software to print on DataCard SP75+ printers. OSU will be purchasing new card printers so they are not part of the proposal, but the interface software (be it ID Works, or something provided directly from the proposer) must be.

28. **Question:** What version of DataCard ID Works is being employed at OSU?

Answer: ID Works version 6.5.

29. **Question: ID Card System Pricing –** Pricing for the following hardware: 5 card processing terminals. Can you describe what or where these may be used on campus?

Answer: These are POS terminals used by our branded vendors (in lieu of a full-blown Micros terminal) to process card system transactions. They are incapable of processing regular credit card transactions.

Point of Sale System (Number designates location in the RFP Documents)

30. **Question: Point of Sale, 2.D;** What is the breakdown of existing Micros terminal model count (e.g. how many Micros WS, 5A's, etc..)
Answer: OSU has 3 Micros WS 5, and 38 Micros WS 5A. All have a cash drawer and an Epson TM T88x Receipt Printer. OSU desires the printers to be repurposed. All have a customer display pole and Micros cash drawer as well.
31. **Question: Point of Sale, 2.E;** We work with Epson TM T88 models 4 and 5. Which are deployed on campus?
Answer: OSU has a mixture of Epson TM T88III, IV, and V models. We estimate about 15 are still the III model.
32. **Question: Point of Sale, 2.H;** What kind of coupons/gift cards are currently being accepted across campus? Are there any that you are looking to add?
Answer: Coupons are generally emailed to customers and can be printed with barcode for a specific amount off (\$ or %) a specific item, type of item (any drink); or a specific amount off a total purchase at one restaurant.
33. **Question: Point of Sale, 2.T;** What percentage of sales are SNAP sales?
Answer: OSU has just started SNAP sales within the last few weeks and do not have that data.
34. **Question: Point of Sale, 2.T;** From a workflow perspective, is SNAP a form of payment or a discount? Does OSU want the POS system automatically recognize that certain items cannot be tendered to the tender type, or if it is a discount, that they cannot be discounted?
Answer: Yes, SNAP is a form of payment. It is basically a bank debit card. Some items are SNAP eligible and some are not. The system will have a way to subtotal the eligible items so they can be charged to the SNAP card and non-SNAP items to another tender.
35. **Question: Point of Sale, 2.V;** Is there a current loyalty provider? If not, who is the University considering?
Answer: There is not a current loyalty provider, and we are not considering any at this point.
36. **Question: Point of Sale, 2.W;** How are you currently using Beacon Technology, or how do you see OSU using this technology in the future?
Answer: Beacon technology will be used to notify the customer when ordered food is ready to be picked up. Text messaging would be a good option for this.
37. **Question: Point of Sale, 2.W;** Can you please provide more detail about this requirement? Are you referring to NFC technology to tender payments via a mobile device (e.g. Apple Pay)?
Answer: Beacon technology will be used to notify the customer when ordered food is ready to be picked up. Text messaging would be a good option for this.
38. **Question: Point of Sale, 3.I;** We currently have a transaction API, but that just records a transaction QuadPoint. What is currently in place that would require this tender API?
Answer: Example – OSU has a home grown online ordering system for on-campus pizza delivery. We'd like to interface with the POS system to deduct money from the campus card system, and also track sales through the POS system.
39. **Question: Point of Sale, 4.D;** What customer data is currently stored in the system that would need to be reported on? Based on PCI standards, no customer sensitive data is stored within the POS, however we can access some data from the card system, if needed.
Answer: OSU is referring to data from the card system here, not credit card transactions. As an example, we need reports that will show the items each customer ordered, when they ordered it, and from where.

40. **Question: Point of Sale, 5.A;** Need more info: How many campus ID card plans are currently active on campus? What are they?

Answer: There are currently six Stored Value plans used by housing and one more used over the summer for conferences. There are two plans (cash and Discount) that are shared by everyone, and the IDC uses five additional plans. This brings the total up to 14 plans in regular use. These are all Stored Value and Credit plans.

41. **Question: Point of Sale, 5.E;** Can you please clarify the needs and scope for this requirement?

Answer: The ability to send a screen message to the registers to notify cashier of a change or immediate action.

42. **Question: Point of Sale Pricing:**

- a. Would OSU prefer the hardware replacement pricing to be included in the overall proposals (we are providing both hosted and on-premise proposals), or as a separate proposal altogether?
- b. What peripheral equipment is currently in use at each to the outlets? If possible please provide a count of the: scales, barcode scanners, and pole displays.
- c. Do any of your cashiers utilize dual cash drawers?
- d. What is the model of the Micros thermal receipt printers that are currently installed? Micros uses Epson TM-T88x printers, and OSU may have T881V or T88V. If you are utilizing a Serial cable to connect the printer to the Micros workstation, we may be able to re-use those printers. Would OSU prefer to re-use those printers, or purchase new?
- e. We typically utilize a "train-the-trainer" approach to our system training during the implementation, which consists of 1-2 days of on-site administrator training. Would OSU like Agilysys Implementation Consultant to conduct additional on-site training sessions for your cashiers and other front-of-house staff?
- f. Shall we include hours for physical installation of the proposed new POS equipment, or will OSU assume responsibility for that task?

Answer:

- a. OSU would like the hardware replacement included.
- b. Each of the current 41 locations has a Micros pole display and cash drawer. All locations have a Motorola barcode scanner. OSU does not have any scales. Two locations have kitchen order displays.
- c. None currently utilize dual cash drawers, but that is an option we may want to utilize for a few locations in the future.
- d. All our POS printers are serial Epson TM-T88x printers, and we would like to reuse them. USB printers are preferable. We could convert them to USB. We also have a number of kitchen printers that are Ethernet.
- e. Train the trainer works for us.
- f. OSU can do the physical installation once we learn how to setup one system.

43. **Question:** Number of existing POS devices being converted to Symphony, please list.

Answer: WS5 - 3 each, WS5A POS Devices – 38 ea.

44. **Question:** Number of new POS devices?

Answer: There may be one or two new POS devices added.

Questions General

45. **Question:** RFP Section 5.02; It states pricing is requested for five (5) card processing terminals. Is this asking for a card printer? Please define “card processing terminal”.
Answer: This is referring to card system interface terminals, not card printing stations.
- Question:** Does OSU need 5 stations where they can print and design cards?
Answer: OSU needs two stations where cards can be designed and/or printed.
46. **Question:** What is the preference for the retail architecture in terms of offline access?
Answer: OSU expects each register to be able to store campus card transactions if the network connection to the server is unavailable. Once network is restored (even after a power outage at the register) the register should then transmit transactions to the server. We do not expect the individual registers to be able to check card balances when the network is down.
47. **Question:** OSU has stated the system should be compatible with existing hardware (Micros 9700 workstations), however it has been identified that Micros often has proprietary chipsets/BIOS so that they do not work with other applications (mainly the system units and printers). Is OSU willing to consider new hardware (Microsoft Windows – based) to replace the Micros system with the new POS system?
Answer: Being able to use the existing Micros workstations is an option, not required. We are open to purchasing new hardware. We have a lot of dollars invested in the existing Micros workstations and know some vendors are able to utilize them with their system, so we add it as an option to hopefully save initial implementation costs.
48. **Question:** RFP mentions online ordering functionality – is OSU looking to include a hospitality based ecommerce platform or do you have a system you want us to integrate too?
Answer: Online ordering: Here’s an example. We have a home grown online ordering system for on-campus pizza delivery. We’d like it to interface with the POS system to deduct money from the campus card system and also track sales through the POS system. If the POS has the ability to handle on-line ordering, we would consider ditching our home grown application and using POS systems web application.
49. **Question:** Can OSU describe how you would like to leverage beacon technology?
Answer: See question #36 above.
50. **Question:** In the RFP there is the following comment “A POS system with the ability to integrate with a menu management system via an API for inventory depletion and reporting”. We have the ability to propose a fully integrated menu management and inventory management that is already contained in our proposed POS solution., Would OSU like to consider using the built-in functionality, or do you prefer to stay with your existing menu management and inventory management system and treat that like an integration to an external system?
Answer: The current POS system pushes inventory depletion and item pricing to our menu management system. The output from the POS system is a CSV that is ingested by Eatec. We would consider a new menu management system, but it would need to be priced separately as an add-on.
51. **Question:** Do you want to keep your existing 9700 configurations, or are you adding/changing RVC, registers, or cleaning up the DB?
Answer: OSU is interested in keeping our current Micros workstations since that would be most cost effective, and we are open to keeping our existing POS system or moving to a new system as long as it meets our needs.

Addendum 1 JD176020P

52. **Question:** How many servers will you have?

Answer: Our current system has 1 DB server and 1 application server for all services. We would want the recommendations from the Proposer.

53. **Question:** Do you require a test server? If you want a test system will you want it licensed? Do you want to copy the production database to the test server? Is the test server implementation in advance of the implementation requiring a second copy of the database?

Answer: OSU does not require a test server, but it might be a good option. Please explain the difference between licensed or not in your Proposal. A server being able to copy the production DB to the Test DB might be a good option to consider. A second copy of the test DB is presently not required.

54. **Question:** How many existing revenue centers do you have? Please list

Answer: OSU currently has 27 revenue centers. A complete list will be provided to the Awarded Proposer if requested.

55. **Question:** How many new revenue centers will be added?

Answer: There may be one revenue center added at the campus mailing & freight department.

56. **Question:** Number of existing tablets being converted to Symphony? Please list.

Answer: OSU does not have any tablets.

57. **Question:** Number of existing revenue centers with KDS?

Answer: There are two locations with 1 KDS unit each.

58. **Question:** Number of existing kitchen printers, please list? Number of new kitchen printers being added?

Answer: OSU currently has 11 kitchen printers. None to be added.

59. **Question:** Number of existing table service locations? Please list. Number of new table service locations, please list?

Answer: OSU does not have any table service locations or immediate plans to have any.

60. **Question:** Do any revenue centers require condiment programming? Please list.

Answer: Most of the locations require condiment programming. There may be five of the locations that do not. Two of the locations use a cycle menu.

61. **Question:** Do you require any gift card interfaces such as Value link, Givex, Etc.? Please list.

Answer: OSU does not currently have gift card interfaces, but would consider that option.

62. **Question:** Does the client use Golden Gate?

Answer: OSU does not use Golden Gate.

63. **Question:** Do you require credit card authorization?

Answer: Yes, we need to accept credit cards.

64. **Question:** Do you use Merchant Link? Shift4?

Answer: OSU uses Merchant Link.

65. **Question:** Do you require new credit card MIDs?

Answer: OSU already has credit card MIDs for all our existing locations.

66. **Question:** How many managers will need to be trained and will need to be quoted the Duluth Admin course?

Answer: Two system managers will need to be trained.

67. **Question:** What satellite operation sites will be coming online? What will OSU's future POS equipment needs be?

Answer: There may be one new revenue center coming online requiring POS equipment.

68. **Question:** Will OSU take credit card payments at all locations using the Micros/Oracle magnetic strip reader or will OSU exclusively use the new chip and signature Elavon Card readers?

Answer: OSU will move exclusively to EMV (chip and pin) for credit card processing. OSU will need a separate EMV credit card reader for each register.

69. **Question:** What vending readers are currently on the Pepsi machines?

Answer: The Pepsi machines on campus do currently accept credit cards. We do not know the version of the vending readers.

70. **Question:** Does OSU wish to use the Micros credit card tendering through at point-to-point encrypted reader or solutions not connected to the Symphony system or a separate device like Veriphone and just log the transaction in Micros Symphony?

Answer: OSU will consider any credit card system that meets EMV and PCI requirements.

71. **Question:** What is the official number of full time students, faculty and staff at OSU?

Answer: Approximately 32,000 students, faculty, staff on the Corvallis campus.

72. **Question:** How many off-campus vendors does OSU support?

Answer: None at this time.

73. **Question:** Do you need Card-Printer? What will be the quantity?

Answer: No Card Printers will be required.

74. **Question:** How many Point-of Sale (POS) Systems do you need?

Answer: Refer to Section 5.02 Point of Sale System Pricing for information.

75. **Question:** Do you need any Contactless SmartCard? What type of chips? What quantity? Other accessories?

Answer: All requested accessories are listed in the RFP. Please bid the solicitation documents inclusive of this Addendum.

76. **Question:** Does OSU need 5 camera kits?

Answer: No camera kits are needed.

77. **Question:** Does OSU print in color on both front & back?

Answer: OSU prints in color front & back. No card printers are part of this solicitation.

78. **Question:** What is your current version of CS Gold?

Answer: CS Gold version 6.

79. **Question:** Will OSU be replacing their current CS Gold 6.X virtual servers with new virtual servers for CS gold 7.X? We would ask that OSU provide us with a current CS Gold V.6 system report to assist us with configuring new servers. CS Gold can run on either physical or virtual servers.

Answer: OSU plans on using virtual servers if the card system is hosted locally.

80. **Question:** What are the estimated dates for contract award and Go Live?

Answer: The solicitation closes on 02/23/16 and it may take several weeks for the evaluation process and contract execution to be completed.

81. **Question:** It appears your current card system is BB Optim. Is this the case?

Answer: This information is not relevant to this solicitation.

82. **Question:** Please define or explain "CCS".

Answer: CCS stands for Campus Card System.

83. **Question:** Does your current MICROS system support EMV?

Answer: Yes, Micros does support EMV, but OSU has not implemented it.

84. **Question:** The RFP states that the dining facilities are "OSU operated". Does this mean the OSU fully self operates all of the dining locations?

Answer: Yes, OSU fully self operates its dining locations. There are also three commercial operators in the MU, which are separate from OSU but operate on OSU property. They do accept OSU ID cards for payment. They are Panda Express, Togo's, and Joe's Burgers.

85. **Question:** OSU asks for two POS scenarios to be quoted: (1) Reimage existing Micros system and (2) Replace Micros system with new hardware/software. Is there a third potential option where OSU simply keeps the existing Micros system in place and the new campus card system interface with it?

Answer: Yes, keeping Micros could be a third option to consider if the reporting requirements between Micros and the card system can be met.

86. **Question:** From the RFP we see OSU requires 41 terminals across 29 restaurants. Is this correct? How many of the following items are required? Cash drawers, scanners, scales, kitchen display units, and NFC devices.

Answer: Each of the 41 locations will need a cash drawer. The locations that need barcode scanners already have them, and we would hope they will work with the new system since they are not proprietary (Motorola scanners). No Scales are needed. There are currently two locations with KDU. None of our locations have NFC, although all of OSU ID cards do have proximity chips.

87. **Question:** How many students are on OSU's meal plan?

Answer: There are 4400 students with meal plans.

88. **Question:** How many students are on the point plan (declining balances)?

Answer: Students (also includes employees, associates, affiliates, and members of the public who have purchased convenience cards) with regular declining balance accounts is 45,000.

89. **Question:** No mention is made of a requirement that the new campus card system connect to the OSU Beaver Store. Is this correct?

Answer: That is correct. There is no requirement that the campus card system connect to the OSU Bookstore.

Entities are not required to return addendums with their offers but are responsible to make themselves aware of, obtain and incorporate into their final offer any information contained in addendums. Failure to do so may make the offer non-responsive and cause it to be rejected.