



**REQUEST FOR INFORMATION
No. JK187600I**

Menu Management System

I. SCHEDULE OF EVENTS

SCHEDULE OF EVENTS:

Issue Date.....May 1, 2017

Due Date and Time.....May 15, 2017 (3:00 pm, PT)

II. ISSUING OFFICE AND CONTACT

ISSUING OFFICE:

The Procurement, Contracts and Material Management (PCMM) department of Oregon State University (OSU) is the issuing office and is the sole point of contact for this Request for Information. All concerns or questions pertaining to this Request for Information should be appropriately addressed to the individual identified below:

CONTACT PERSON:

Name: Jennifer Koehne
Title: Purchasing Analyst

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III. INTRODUCTION

INTRODUCTION:

This is a Request for Information (RFI), issued by Oregon State University (OSU) Procurement, Contracts and Material Management department on behalf of the University Housing and Dining Services (UHDS). The purpose of this RFI is to solicit input from potential contractors for information pertaining to a menu management system.

OREGON STATE UNIVERSITY:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. Oregon State is one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. Oregon State is also the only Oregon institution to have earned both Carnegie Foundation classifications for Highest Research Activity and Community Engagement, a recognition of the depth and quality of its graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, Oregon State has a presence in all of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. Oregon State offers undergraduate, master's and doctoral degrees through 11 academic colleges, the Honors College, Graduate School and online Ecampus, enrolling more than 31,000 students from every county in Oregon, every state in the country and more than 110 nations.

IV. REQUIREMENTS

BACKGROUND

University Housing and Dining Services (UHDS) is committed to providing their residents with a living and dining environment that will be both enriching and enjoyable, as well as support their academic pursuits. University Housing and Dining Services (UHDS) vision at Oregon State University is to provide a transformative on-campus experience that will ENGAGE the students in community, ENRICH their lives, and help them flourish and THRIVE. UHDS values Trust and Respect, Community, Shared Leadership, Authentic Relationships, Creativity and Innovation and Stewardship. UHDS currently has four primary dining locations and eight satellite dining locations. As part of their dining program, UHDS is committed to a sustainability initiative that provides local, organic and natural food sources. UHDS currently uses a menu management system with unlimited users however, UHDS is interested at this time in getting a better understanding of what software options exist in the market currently that will help them to support their mission and goals.

MENU MANAGEMENT SYSTEM SPECIFICATIONS

(p)- preferred

(r)- required

TECHNICAL

- Software as a Service (SaaS) cloud hosted solution (p)
- Mobile interface (r)
- Single Sign On (SSO) authentication (r)
- Log all changes by users (r)
- Complete order integration with vendors:
 - Generate, send, receive, post, export accounts payable (A/P) for payment (r)

- Integrate with Jaggaer for purchase order (PO) and invoice processing (eProcurement) (p)
 - Application Program Interface (API) for invoice payment (r)
 - Comma-Separated Values (CSV) invoice payment export (r)
- Easy to import new inventory items or mass import items (r)
 - Import from a list, CSV, vendor list including all item attributes (r)
 - Vendor import current pricing (p)
 - Ability to import recipe method, copy-paste (p)
- Built in book of yields (p)
- Inventory capabilities (r)
 - Ability to barcode scan items for inventory (r)
 - Ability to add custom fields to an item (r)
 - Cycle count/perpetual inventory capabilities (r)
 - Mobile/handheld/tablet/scan-able inventory (paperless) (r)
 - Multi-Location inventory (r)
 - Order pars – ability to set low inventory warning parameters (r)
 - Retail inventory depletion API from point of sale (POS) currently using Sequoia POS (p)
 - API with CaterTrax for inventory depletion and food costing (p)
- Sales posting and price updating from POS (Sequoia) (p)
- Data input validation (r)

NUTRITION & ALLERGENS

- Create FDA standard nutrition labels based on recipe (r)
- Linked to USDA database as well and ability to manually enter nutrition information (r)
- Nutrition and allergen changes should propagate to all items, recipes, and menus (r)
- Menu nutrition export posting on web (r)
 - API to export nutrition labels with menu items (r)
 - Online menus include dietary labeling and/or custom icons (p)
- Serving Display Card with Allergens and/or custom icons (r)
- Special dietary tagging with customizable icons and text (e.g. Vegan, Halal, Kosher) (r)
 - Ability to adjust nutrition and item labels to account for moisture, fat loss, and refuse (p)
- Ability to pull sub recipe nutritional information into a main recipe (r)
- Ability to export nutrition information to external media (r)

REPORTING and LABEL FUNCTIONS

- Ability to export reports in multiple formats: PDF, CSV, HTML, etc. (r)
- Ability to write and save custom reports (r)
- Multiple pre-configured reports (r)
- Reports/Forms needed
 - Requisition/Transfer forms (r)
 - Waste Logs (r)
 - Pull Sheets (r)
 - Inventory Forms (r)
 - Missed Inventory Forms (r)
 - Weekly Supply List (r)
 - Framework of Inventory Type Detail (category) (r)
 - Framework of Inventory Item Detail (category) (r)
 - Reports for Static Menus and Cycle Menus (r)
 - Reports for purchasing, spoilage & loss, usage activity (r)

- Nutrition analysis reports (r)
 - Cycle menu nutrition analysis report (r)
- Ability to easily add identifiers and track local, sustainable inventory items (p)
- Retail Shelf Tag w/Price and UPC labeling (r)
- Print UPC code labels for warehouse shelves and retail store shelving with retail prices (r)
- Serving display labels and cards (r)
- Printable grab and go packaging labels (r)
- Cycle menu export that can be web embedded (p)

RECIPES/MENUS

- Recipe scaling (r)
 - Ability to proportionately scale spices and seasonings (r)
 - Ability to have unit of measure to scale proportionally to match size of recipe (p)
 - i.e.: 32 Tbsp. listed as 2 cups
- Ability to scale items back out of recipe (e.g. marinades, raw vs. caramelized onion for cook prep/loss) (r)
- Forecasting and management (r)
- Accurate conversion and rounding units of measure (weight to volume) (r)
- Ability to have customizable units of measure for each item quantity type (r)
- System wide changes of new ingredients (r)
 - If a new item is substituted for an existing item, there should be an option to automatically change the new item in all associated recipes, sub recipes, and nutrition information. (r)
 - If a system wide change is made to a recipe, or cycle menu there is an option to apply this change to all related recipes or cycle menus(p)
- Ability to adjust font size of printed recipes (p)
- Spell checking during item and recipe input (p)
- Ability to put a sub recipe in another recipe (r)
- Ability to pull sub recipe nutritional information into a main recipe (r)
- Ability to view and check weight/portion variances and insure accuracies (r)
- Ability to edit recipes, use pending approval (based on user level) (r)
- Ability to have short, long, and descriptive recipe names (p)
- Lock recipes so they can only be changed or deleted by higher privileged user (r)
- Copy and change recipe as a template (r)
- Ability to store tutorial videos and picture with recipes (p)
- Ability to code at inventory and recipe level (e.g. slack time, marinade, prep of other ingredients, firing time, etc) (p)
- Ability to identify a new/revised recipe in the system with an icon or specific font color for a timeframe (p)
- Ability to tag an item or recipe with multiple fields e.g sustainable, local, organic, seasonal, from a specific farm. Customizable fields as an option would be preferred (p)
- Yield loss and cook loss for each application of cooking (p)
- Multiple portion size in recipe (e.g. batch and portions per batch or full sheet pan and 60 servings) (p)
- Ability to ARCHIVE recipes (r)

MENU MANAGEMENT SYSTEM OPTIONS

HOSTING, SUPPORT & MAINTENANCE AND OTHER

- Hosting, support and maintenance (r)
 - Detail all hosting, support and maintenance options.
 - Detail security practices.
 - Detail upgrade and patching practices.
- Training (r)
 - Detail all training options available including on-site, off-site and remote.
- Accessibility (r)
 - System should be American Disability Act (ADA) Section 5.08 compliant and the Web Content Accessibility Guidelines (WCAG) 2.0 level AA.
- Customer Support (p)
 - A dedicated representative or case manager provided (p)
- Implementation (r)
 - A project plan with clear deliverables around the implementation process (r)
 - A system that can be implemented in under three (3) months (p)

V. SUBMITTALS

Respondents are requested to submit the following:

- Submit one (1) electronic copy of your response to **jennifer.koehne@oregonstate.edu**;
- Narrative describing the respondent's approach to fulfilling OSU's requirements. Note any required specification that cannot be met;
- Marketing material or brochures of goods or services referenced in the narrative;
- Pricing/Licensing models including hosting, support, maintenance, training, and implementation as applicable. Models presented should take into account UHDS' background and business requirements as defined under section IV Requirements.
- Any available discounting options or programs offered.

To be considered, responses to this RFI must be received no later than the due date and time indicated in the Schedule of Events. Responses must be sent to the contact person identified in Section II of this RFI.

Information gathered in this process could potentially be incorporated in an Invitation to Bid (ITB) or Request for Proposal (RFP). Any resulting RFP or ITB will be openly competitive and therefore responses should not be exclusive or restrict competition. This RFI does not obligate OSU to issue an RFP or ITB nor to include information submitted by respondents.

A contract will not be issued directly from this RFI, nor will issuance or acceptance of submittals or subsequent conversations bind OSU into any type of contractual obligation or relationship.