OSU
Oregon State
UNIVERSITY

REQUEST FOR INFORMATION
No.JD174506I

Campus Card System &
Point-of-Sale (POS) System

I. SCHEDULE OF EVENTS

SCHEDULE OF EVENTS:

Issue Date..February 17, 2015

Due Date and Time...March 31st, 2015, 4:00pm PST

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: Joshua Dodson
Title: Procurement Contracts Officer

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Address: Oregon State University
                 Procurement, Contracts and Materials Management (PCMM)
                 644 SW 13th Avenue
                 Corvallis, Oregon 97333

III. INTRODUCTION

INTRODUCTION:

This is a Request for Information (RFI), issued by Oregon State University (OSU) Procurement Contracts and Materials Management (PCMM). The purpose of this RFI is to solicit input from potential contractors for information pertaining to a Point-of-Sale system.

BACKGROUND:
Oregon State University (OSU) has operated as a one-card system since the late 1980s. The OSU ID Center is the administrating office for the campus ID card. The ID card is used by residence hall students to gain access to their halls, by campus community members to purchase food in the 32 on-campus restaurants, by the athletic department to verify eligibility for tickets/entry to games, and by the campus recreation center for checking out equipment and reserving court times. The ID card system pulls data from the OSU Banner system and interfaces with the Point-of-Sale system used by the self-operated campus restaurants. The ID card system also supports card readers at the nationally branded restaurants on campus.

University Housing and Dining Services (UHDS) is a self-funded auxiliary department which receives no state or federal funds. UHDS maintains the Point-of-Sale (POS) system for the restaurants operated by UHDS and the restaurants operated by the Memorial Union Retail Food Service department (MURFS). This POS system currently encompasses 42 individual registers serving 29 different restaurants; these numbers are expected to increase as Oregon State University (OSU) continues to expand both on the current campus and through satellite operation sites. The database currently holds nearly 22,000 master records and over 45,000 individual sub-records covering both retail items and recipe/menu items. UHDS currently accepts Visa and MasterCard debit/credit cards as payment types in addition to the OSU ID Card and OSU Conference Cards.

CHALLENGES:
For the Campus Card System:
OSU has recently embraced a new First-Year-Experience initiative, believing that students who live on campus during their first year are more likely to succeed academically and graduate. More and more departments are now wanting to track which students attend classes, events, and use particular rooms, buildings, and areas. The current campus card system lacks the ability to track attendance in the manner desired by the campus.

For the POS System:
Although the current POS system does interface with the current Campus ID Card System, only minimal data is exchanged between the two systems. Our customers and departmental decision makers would prefer more integrated reports to answer questions such as – What items did customer X purchase from which location and using what Campus Card System ID plan? Currently a customer can see a transaction history report showing where they spent their Campus Card dining dollars, but not what they purchased for those dining dollars. We want to provide the ability for the customer to see both of these elements on the same report.

With new PCI and chip and pin security requirements around the processing of credit cards & debit cards, we need more secure methods of encrypting & transmitting credit card information so we can limit the university's liability.

With tightening budgets, we need to minimize expenses anywhere possible. License, maintenance, and support fees often feel exorbitant when compared with what we actually get for those fees.

UHDS and MURFS process over 12,000 transactions per day. UHDS computing services staff handle most of the customer service issues on their own. However, when they encounter something that needs to be fixed by the POS vendor reliable and timely support is required.

OREGON STATE UNIVERSITY:
Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is 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, a 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, master's and doctoral degrees through 12 academic colleges enrolling more than 25,000 students from every county in Oregon, every state in the country and more than 90 nations.

IV. REQUIREMENTS

We are looking for a solution that will meet our current and future needs for both systems. We are open to considering a single vendor solution that integrates the campus card with the POS system. We are also open to considering vendor solutions that fit only the POS system or only the Campus Card system, as long as they can directly interface with the other system and provide the reports desired by the institution.

Below is list a critical and preferred requirements.

For the Campus Card System:

Dining Plans
- Configure, process, and administer <u>both</u> meal plans (board plan) & point plans (stored value/credit).
  - o Configure & edit configuration for maximum/minimum balance, allowable locations, plan name, applicable discount codes, search paths, and low balance alert to cardholder
- All plans (meal plans & point plans) must be able to be user-configured as increasing balance or decreasing balance plans at discretion of user (admin level) based on operational needs at the moment.
  - o Ability to reset balances to zero for increasing balance plans on the 1st of each month.
- Add, remove, adjust meal plans & point plans by batch import and manually.
  - o Change/swap dining plans on a patron record, manually or by sub-routine
  - o Add value to balance (deposit) manually or by batch import or web interface
  - o Deduct value from balance (withdraw) manually or by batch import
  - o Remove dining plan from patron without deleting patron, manually or batch import
- Plan setup flexibility.

Patron Records/Accounts
- Cloud based hosting option
- Add, remove, update, and change patron records by batch import and manually
- Set up a variety of patron account templates
- Interface for upload patron-supplied ID photos
- Interface with OSU enterprise systems and load into appropriate patron fields
- Lost card code field that can be updated by ID Center staff and patrons
- Mechanism to encode card stock with information from the Patron record (photo, patron name, ID Number, current lost card code)
- Smart phone based card application options using NFC and barcodes

Transactions
- Store offline transactions and process when system comes back online.
- Track transactions not posted with ability to process or delete. (Offline Posting Utility)

- Track & store transaction history for recall – retrievable by reports, viewable by cardholder.

System Discounts
- Configure multiple transaction discounts for custom specified plans, locations, &/or activity codes/flags

Locations
- Support over 200 locations with differing uses and configurations
- Ability for user (admin) to configure system locations based on function/use

Plan Search Paths
- Multiple search paths that can be user configured to apply by location
- Force transaction to follow an alternate search path at the POS

Reports
- Create customized reports using any/all database fields
- Canned reports that access transaction history by individual patron or by location for a specified date range

Database Access
- Support multiple levels of security & accessibility
- Direct database reporting
- Import enterprise data into system
- Export data fields

Interfaces
- OSU's POS system (Micros currently)
- OSU's enterprise records system (Banner currently)
- UHDS Housing Assignments System (Adirondack currently)
- UHDS Menu Management System (Eatec currently)
- Ability to update interfaces as OSU changes systems
- Meet PCI-DSS compliance standards

IMPROVEMENTS (desires)
- Ability to retrieve purchase details from POS system with Dining Plan transaction & history reports.
- Mobile card reading device for conducting food sales off-site – containing the Dining Plan data & the POS data – and tracking/reporting those sales transactions.
- Ability to work with multiple 3-party systems.
- Low maintenance/licensing fees.
- Ability to monitor/track/report attendance (using systems already in place at OSU).
- Ability to utilize POS hardware already in place at OSU.
- Customer interface for: SV&C deposits, image uploads, activate/deactivate card.

For the POS System:
Security
- If not integrated with the Campus Card System, it must interface directly and securely with the new campus ID system.

- Cashier and user identity tracking and permissions
- Various levels of user access (unlimited users)
- Credit card processing: real time token processing to PCI standards
- Must meet new chip and pin standards

Front-end
- Subtotal item list before tender; allow multiple subtotals as directed by cashier
- Accept Multiple tender types and multiple tender per transaction
- Use existing registers (Micros 9700, workstation 5 & 5a)
- Ability to enter multiple tax levels
- Coupons and discount options
- Multiple layered menu screens; customizable screens
- Made to order options
- Scale interface, prep & receipt printers, barcode scanners kitchen monitors & bump bar
- Table, order, and customer numbers and names
- Offline functionality
- Specials pricing, combo pricing, (with time ranges, future time/date ranges too)
- Ability to format the receipt and add custom text
- Customer display (double sided option for dual line viewing)
- Conference meal and cash sales at same time
- Special pricing for a limited quantity of item
- Void items and tickets
- Descriptive item names on register and receipt (more than 16 characters)
- SNAP (food stamp acceptance)

Back-end
- Cloud server hosting options
- Mass item uploading and updating
  - Multiple locations at once
- Multiple restaurants with different menus and items
- Retail, C-Store, and restaurant location types

Reporting
- Real time reporting module
- When items is changed (new name) all reports need to show current information.
- Detailed customer data mining and reporting, customized reporting

Miscellaneous
- Ability to work with multiple campus card plans (including individual customer reporting)
- Ability to integrate with menu management system
  - Inventory depletion and reporting
- Multiple training options (in person classes, video, online, documents, etc.)
- 24-7 support options with guaranteed response time
- Global licensing desired

Future Needs
- Web based ordering
- Mobile POS devices
- Bottle returns

- Gift cards (3rd party too)
- Ability to accept on-line payment tenders (google wallet, paypal, mobile phone, etc)

V. SUBMITTALS

Respondents are requested to submit the following:

- Submit your response electronically to joshua.dodson@oregonstate.edu;
- OSU would like to see the vendor's possible solutions for the requirements listed above. Please provide whatever documentation you feel is necessary to meet this need.
- Marketing material or brochures of goods or services referenced in the narrative;
- Examples of work and materials from similar projects.

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.