NOTE TO VENDORS: The following list is not exclusive. Vendors should be prepared to demonstrate other functionality included in the base product that is not specifically identified below. Vendors should also be prepared to demonstrate “best practices” when applicable.

If there is duplication in some questions, please do not duplicate information unless further clarification is requested by the audience.

The audience will be IT Staff. Up to four hours will be available for this presentation.

1. Integration between HR, Payroll and Finance, and other legacy systems:
   A. How do new hires get from the HR system to our identity management system (Active Directory)?
   B. After implementing your Finance system how do you implement access control using our existing identity management framework (Active Directory)?
   C. Please provide a list of third party applications that you provide integration with.
   D. Describe and be prepared to demonstrate the delivered functionality and integration between your HR/Payroll system and our legacy Student Information System.

2. Workflow and Approvals:
   A. To what extent are workflow and approvals role-based (rather than based on individual people)?
   B. Describe your ability to integrate workflow steps with external third party systems.
   C. Demonstrate the ability to add notes and comments during the workflow process. Describe the ability to limit who has access to view or modify notes and comments.

3. Managing multiple environments – (i.e. test, train, production):
   A. Which environments are provided with your hosted system?
   B. Is there an archive?
      1. If yes, how often is data moved to the archive?
   C. Please describe the process of migration across environments with an emphasis on client responsibilities.
   D. Please describe the process to refresh data from the production environment to other environments (i.e. the test environment) with an emphasis on client responsibilities.
   E. Please describe the process to restore backed up data to each environment with an emphasis on client responsibilities.
   F. Please describe your patch and release schedule.
   G. Explain your approach to the introduction of new functional capabilities – coincident with or separate from bug-fix updates.
   H. Please describe your approach to extensions and customizations – including customized integration points - in order to minimize the impact on the client’s ability to adopt future releases. Please provide example documentation showing the process required to upgrade a customer who has such customizations in place.
   I. If you provide a hosted solution, can your hosted customers gain program level access to the hosted database?
   J. Please describe programming tools provided or recommended for your environment.
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K. Explain how system upgrades are tracked to provide audit trails of all system upgrades (including patches).

4. Report Distribution:
   A. Explain and be prepared to demonstrate your ability to import and export from/to Excel – and describe how user security is enforced during this process.
   B. PSU has adopted Microsoft SQL server as its standard data repository. Please describe how data can be extracted from your system for import into this environment.
   C. Explain and be prepared to demonstrate how standard reports can be run on several cycles (i.e. weekly, monthly etc.). How is relevant data for each user assembled and made available? Highlight how this approach makes efficient use of disk and network resources.
   D. Explain and be prepared to demonstrate how end users and system administrators run reports in each module. Do end users have the ability to run custom reports and queries on all available information, or are they limited to canned, “out of the box” reports?
   E. Can report generation be automated based on events?

5. Reporting and Data Extraction:
   A. In addition to online transaction processing, please describe any capabilities our technical staff will have to modify data programatically – external to your application. (i.e. API, Web Services, etc.).
   B. Describe and be prepared to demonstrate the options available to perform mass changes to our data.
   C. Describe and be prepared to demonstrate any Extract, Transform, and Load (ETL) tools provided with your system.

6. User and Management Interfaces:
   A. Please describe and be prepared to demonstrate your supported list of browsers, browser plug-ins, operating systems, and Java runtime environments.
   B. Please describe your process for staying current with the latest set of browsers, browser plug-ins, operating systems, and Java runtime environments.
   C. Please describe your minimum system requirements for client and administrative workstations.
   D. Describe your approach to external user authentication and any delivered integration.
   E. Please supply a list of all mobile apps and modules that you offer with your system. Please describe any mobile functional limitations that may currently exist in a mobile environment. Be prepared to demonstrate mobile interfaces on iOS and Android devices.

7. Operational Environment:
   A. Hosted On-site –
      1. Describe the virtual machine instances (applications server, database server, etc.) required for the proposed solution. Include operating system and recommended resource allocation (vCPUs, RAM, vdisks, etc.) for each VM.
   B. Hosted Off-site –
      1. Describe your disaster recovery strategy, as well as the robustness and survivability of your NOC and Datacenter(s).
      2. Explain the procedure for exporting university data should we choose to terminate our relationship with your company.
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8. **Sustainability:**
   A. Explain how your proposed solution encourages environmentally sustainable practices.

9. **Implementation:**
   A. Explain how your implementation team will integrate with our in-house project management infrastructure to ensure a smooth transition and compliance with state requirements for project management.
   B. What project management team collaboration tools do you employ (i.e. BaseCamp, etc.)?

10. **Support:**
    A. Describe your support levels and the schedule for each.
    B. Who assigns a level of criticality to a support request (i.e. vendor or customer)?
    C. Will we have an assigned support person?
    D. What’s the process for requesting enhancements or custom development?

11. **Data:**
    A. Describe how your system maintains the history of changes to all application objects (version control). Describe how the change history is stored.