Appendix C – Detailed Specifications and Requirements

1. **SOFTWARE SUPPORT & MAINTENANCE**
   1. Vendor must provide annual Oracle Database software technical support and software updates for a period of three years beginning August 1, 2019 through July 31, 2021 with the following requirements.
      1. The Vendor must provide Internet/Web online and telephone support for technical staff.
      2. The Vendor must commit to respond to technical support issues in less than 24 hours.
      3. The Vendor must provide support to the university support staff beyond Level 1, Help Desk.
      4. The Vendor must provide new software releases to the university via Internet/Web online access.
      5. The Vendor must provide zero lag time between when the manufacturer provides new software releases to the Vendor and when the Vendor provides to the university.
      6. The Vendor must provide new software releases at no additional costs beyond what is being proposed in this technical support and maintenance renewal.
      7. The Vendor must provide new patches and bundles to the University via Internet/Web online access.
      8. The Vendor must provide zero lag time between when the manufacturer provides new patches and bundles to the Vendor and when the Vendor provides to the University
      9. The Vendor must provide new patches and bundles at no additional costs beyond what is being proposed in this technical support and maintenance renewal
      10. Access to My Oracle Support (https://support.oracle.com) must be made available at no additional cost beyond what is being proposed in this technical support and maintenance renewal
   2. Vendor must provide annual Oracle/PeopleSoft Application Module technical support and software updates for a period of three years beginning August 1, 2019 through July 31, 2021 with the following requirements
      1. The Vendor must provide Internet/Web online and telephone support for technical staff.
      2. The Vendor must commit to respond to technical support issues in less than 24 hours.
      3. The Vendor must provide support for existing PeopleSoft module new functionality as it is developed.
      4. The Vendor must provide new software releases to the university via Internet/Web online access.
      5. The Vendor must provide zero lag time between when the manufacturer provides new software releases to the Vendor and when the Vendor provides to the university.
      6. The Vendor must provide new software releases at no additional costs beyond what is being proposed in this technical support and maintenance renewal.
      7. The Vendor must provide new regulatory updates to the university via Internet/Web online access.
      8. The Vendor must provide zero lag time between when the manufacturer provides new regulatory updates to the Vendor and when the Vendor provides to the university.
      9. The Vendor must provide new regulatory updates no additional costs beyond what is being proposed in this technical support and maintenance renewal.
      10. The Vendor must provide new patches and bundles to the University via Internet/Web online access.
      11. The Vendor must provide zero lag time between when the manufacturer provides new patches and bundles to the Vendor and when the Vendor provides to the University
      12. The Vendor must provide new patches and bundles at no additional costs beyond what is being proposed in this technical support and maintenance renewal.
      13. Access to My Oracle Support (https://support.oracle.com) must be made available at no additional cost beyond what is being proposed in this technical support and maintenance renewal.
   3. Vendor must provide per item maintenance charges that will be valid for three (3) years. The University reserves the right to add/delete items on a year-to-year basis without penalties.

MANUFACTURER DIRECT MAINTENANCE

* 1. USM understands that the maintenance requested in this RFP may be provided directly by the manufacturer. If Vendor is the named manufacturer and will be supplying the maintenance services directly, Items 2.1.4 through 2.1.12 do not have to be completed.
     1. Responding Vendor must clarify whether he is the named manufacturer and will be supplying the maintenance services directly or whether he is a third party reseller selling the maintenance services on behalf of the manufacturer.
     2. Responding Vendor must explain his understanding of when or whether the manufacturer will ever sell the maintenance services directly and, if so, under what circumstances.
        1. If the responding Vendor to this RFP will only be reselling manufacturer’s maintenance services, it is USM’s understanding that this is basically a “pass through” process.
        2. Please provide a detailed explanation of the relationship of who will be providing the requested maintenance, to whom the purchase order is made, and to whom the remittance will be made. If there is a difference in the year one maintenance purchase versus subsequent years of maintenance, the responding Vendor must clarify and explain.
     3. Manufacturer Direct Maintenance when sold directly through the manufacturer: Fixed Cost
        1. If responding Vendor is the direct manufacturer, he must propose annual fixed pricing for three years of the requested maintenance. Vendor must provide all details of the maintenance/support and all associated costs.
        2. It is USM’s preference that the Manufacturer’s proposal is a not-to-exceed firm commitment. In the event that the manufacturer cannot commit to a fixed cost for the subsequent years of maintenance after year one, Manufacturer must specify the annual maintenance increase ceiling offered by his company on the proposed products. Vendor must state his policy regarding increasing maintenance charges. Price escalations for Maintenance shall not exceed 5% increase per year.
     4. Manufacturer Direct Maintenance when sold through 3rd Party: Fixed Cost-Plus Percentages
        1. In the case of a third-party “pass-through” USM realizes that the responding reseller may not be able to guarantee a fixed price for maintenance after year one since his proposal is dependent on the manufacturer’s pricing or possibly on a distributor’s pricing.
        2. It is USM’s preference that the responding reseller work with the manufacturer to obtain a commitment for a firm fixed price over the requested maintenance period.
     5. In the event that the responding reseller cannot make a firm fixed maintenance proposal for all the years requested, the responding reseller is required to provide a fixed percentage for his mark-up on the manufacturer direct maintenance that he is selling as a third party reseller in lieu of a price ceiling based on a percentage yearly increase.
        1. In this scenario, Resellers must include in the Pricing Spreadsheets the price the Vendor pays for the maintenance and the percentage by which the final price to USM exceeds the Vendor’s cost for the maintenance (i.e. cost-plus percentage).
        2. Alternatively, Resellers may propose a fixed percentage for their mark down on the manufacturer’s direct maintenance based on a national benchmark from the manufacturer, such as GSA, Suggested Retail Price (SRP) or the manufacturer’s web pricing. This national benchmark pricing must be verifiable by USM during the maintenance contract.
     6. The cost-plus/minus percentage will be fixed for the term specified in the RFP. To clarify, the USM’s cost for the products will change over the life of the award if the price the Vendor must pay for a given product increases or decreases. However, the percentage over Vendor cost which determines the USM’s final price WILL NOT change over the life of the award.
     7. USM will use this percentage in evaluating cost for scoring purposes.
     8. Periodic Cost-Plus Verification - At any time during the term of this contract, the USM reserves the right to request from the awarded Vendor, access to and/or a copy of the Manufacturer’s Base Pricing Structure for pricing verification. This pricing shall be submitted within seven (7) business days after the USM’s request. Failure to submit this pricing will be cause for Contract Default.
        1. Vendor Cost is defined as the Vendor’s invoice cost from the distributor or manufacturer.
        2. The Vendor’s Proposed USM Price is defined as the Vendor Cost plus the proposed percentage mark-up.
     9. Vendor must also indicate how future pricing information will be provided to the USM during the term of the contract.
     10. Vendor must indicate from whom he buys the maintenance: directly from the manufacturer or from what distributor.
     11. Vendor must be aware that only price increases resulting from an increase in price by the manufacturer or distributor will be accepted. The Vendor’s proposed percentage markup or markdown for these items, as well as the Vendor’s percentage markup or markdown for any new items, MUST stay the same as what was originally proposed. Vendor must provide USM with the suggested retail price.
     12. Pricing proposed for the USM MUST equal the Vendor’s invoice cost from the distributor or manufacturer plus the maximum percentage markup that the reseller will add OR the manufacturer’s national benchmark minus the cost percentage proposed.

| **MFG** | **CSI #** | **DESCRIPTION** | **No. of Users** | **YEAR 1** | **YEAR 2** | **YEAR 3** | **TOTAL COST** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Oracle/PeopleSoft | 14479067 | PeopleSoft Enterprise ePay - Employee Count Perpetual | 3,200 |  |  |  |  |
|  | 14479067 | Conversion Only - Ibm Was - Reported Budget Perpetual | 3,200 |  |  |  |  |
|  | 14481914 | Conversion Only - Ibm Was - Reported Budget Perpetual | 309,400,000 |  |  |  |  |
|  | 14671579 | FMS (Finance Mgmt Solutions) Expansion - Reported Budget Perpetual | 309,400,000 |  |  |  |  |
|  | 14481914 | PeopleSoft Enterprise Billing - Reported Budget Perpetual | 309,400,000 |  |  |  |  |
|  | 14481914 | PeopleSoft Enterprise Contracts - Reported Budget Perpetual | 309,400,000 |  |  |  |  |
|  | 14481914 | PeopleSoft Enterprise Grants - Reported Budget Perpetual | 309,400,000 |  |  |  |  |
|  | 14481914 | PeopleSoft Enterprise Receivables - Reported Budget Perpetual | 309,400,000 |  |  |  |  |
|  | 14481916 | FMS (Finance Mgmt Solutions) Expansion - Reported Budget Perpetual | 285,600,000 |  |  |  |  |
|  | 14481916 | SCM (Supply Chain Mgmt) Expansion - Reported Budget Perpetual | 285,600,000 |  |  |  |  |
|  | 14483446 | Merant Net Express V3 Win/Nt | 3 |  |  |  |  |
|  | 14483447 | Merant Upgrade Obj Cobol Dev T | 3 |  |  |  |  |
|  | 14486836 | PeopleSoft Enterprise Human Resources For Public Sec - Employee Count Perpetual (pka PeopleSoft HRMS for Public Sector) | 3,200 |  |  |  |  |
|  | 14486836 | PeopleSoft Enterprise Payroll For Public Sector - Employee Count Perpetual | 3,200 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Academic Advisement - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Admissions - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Campus Community - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Financial Aid - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Student Financials - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Student Records - Student Count Perpetual | 13,500 |  |  |  |  |  |
|  | 14486837 | PeopleSoft Student Administration - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Billing - Reported Budget Perpetual | 23,800,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Contracts - Reported Budget Perpetual | 23,800,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Grants - Reported Budget Perpetual | 23,800,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Receivables - Reported Budget Perpetual | 23,800,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise General Ledger - Reported Revenues Perpetual | 27,900,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise Payables - Reported Revenues Perpetual | 27,900,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise Project Costing - Reported Revenues Perpetual | 27,900,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise Purchasing - Reported Revenues Perpetual | 27,900,000 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Accounts Payable For The Publi - Reported Budget Perpetual | 93,000,000 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise General Ledger For The Public - Reported Budget Perpetual | 93,000,000 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Project Costing For Public Sec - Reported Budget Perpetual | 93,000,000 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Purchasing For Public Sector - Reported Budget Perpetual | 93,000,000 |  |  |  |  |
|  | 14486839 | PeopleSoft Enterprise Community Access - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486839 | PeopleSoft Enterprise Community Directory - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486839 | PeopleSoft ~~Enterprise~~ Higher Education Faculty ~~Learning~~ Management - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486839 | PeopleSoft Enterprise Involvement - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486839 | PeopleSoft Enterprise Learner Services - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486839 | PeopleSoft Enterprise Outreach - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 14486839 | PeopleSoft Enterprise Personal Portfolio - Student Count Perpetual | 13,500 |  |  |  |  |
|  | 15640045 | PeopleSoft Enterprise ePay - Employee Count Perpetual | 320 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise General Ledger - Nonstandard User Perpetual | 9,300,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise Payables - Nonstandard User Perpetual | 9,300,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise Project Costing - Reported Budget Perpetual | 9,300,000 |  |  |  |  |
|  | 15640399 | PeopleSoft Enterprise Purchasing - Nonstandard User Perpetual | 9,300,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Billing - Nonstandard User Perpetual | 47,600,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Contracts - Nonstandard User Perpetual | 47,600,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Grants - Nonstandard User Perpetual | 47,600,000 |  |  |  |  |
|  | 15646902 | PeopleSoft Enterprise Receivables - Nonstandard User Perpetual | 47,600,000 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Academic Advisement - Student Count Perpetual | 4,350 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Admissions - Student Count Perpetual | 4,350 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Campus Community - Student Count Perpetual | 4,350 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Financial Aid - Student Count Perpetual | 4,350 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Student Financials - Student Count Perpetual | 4,350 |  |  |  |  |
|  | 14486837 | PeopleSoft Enterprise Student Records - Student Count Perpetual | 4,350 |  |  |  |  |
| Oracle | 3017380 | Diagnostics Pack 1.5 | 225 |  |  |  |  |
|  | 3017380 | Oracle Server EE 8i | 225 |  |  |  |  |
|  | 3017380 | Tuning Pack 1.5 | 225 |  |  |  |  |
|  | 14042438 | Oracle8i Enterprise Edition - Concurrent Device | 99999 |  |  |  |  |
|  | 14042438 | Oracle8i Standard Edition - Concurrent Device | 99999 |  |  |  |  |
|  | 14042438 | Tuning Management Pack - Concurrent Device | 99999 |  |  |  |  |
|  | 15450661 | Configuration Management Pack - Named User Plus Perpetual | 17223 |  |  |  |  |
|  | 18842090 | Configuration Management Pack - Named User Plus Perpetual | 2080 |  |  |  |  |
|  | 15809307 | Diagnostics Pack - Nonstandard User | 99999 |  |  |  |  |
|  | 15809307 | Oracle8i Enterprise Edition - Concurrent Device | 99999 |  |  |  |  |
|  | 15809307 | Oracle8i Lite - Named User | 99999 |  |  |  |  |
|  | 15809307 | Oracle8i Personal Edition - Named User | 99999 |  |  |  |  |
|  | 15809307 | Oracle8i Standard Edition - Concurrent Device | 99999 |  |  |  |  |
|  | 15809307 | Tuning Management Pack - Nonstandard User | 99999 |  |  |  |  |
|  | 17605327 | Diagnostic Management Pack - Nonstandard User | 99999 |  |  |  |  |
|  | 17605327 | Oracle 8i Standard Edition - Named User | 99999 |  |  |  |  |
|  | 17605327 | Oracle 8i Enterprise Edition - Named User | 99999 |  |  |  |  |
|  | 17605327 | Oracle 8i Lite - Named User | 99999 |  |  |  |  |
|  | 17605327 | Oracle 8i Personal Edition - Named User | 99999 |  |  |  |  |
|  | 17605327 | Tuning Management Pack - Nonstandard User | 99999 |  |  |  |  |
|  | 18060482 | Diagnostics Pack - Nonstandard User | 99999 |  |  |  |  |
|  | 18060482 | Oracle Database Enterprise Edition - Nonstandard User | 99999 |  |  |  |  |
|  | 18060482 | Tuning Management Pack - Nonstandard User | 99999 |  |  |  |  |
| **TOTAL SUPPORT COST:** | | | |  |  |  |  |
| **TOTAL 3-YEAR SUPPORT COST:** | | | |  |  |  |  |

If any of the items below are included in Vendor’s proposal they must be detailed below.

Warranty:

Maintenance:

Training:

\*Manufacturer model number, not Vendor number. If Vendor's internal number is needed for purchase order, include an additional column for that number.