# LICENSE AND PERMIT SALES

## Attachment "A"

|  | **Requirements** | **A** | **B** |
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| **License and Permit Sales - General Specifications (requirements that apply to all licenses and permits)** | | | |
|  | Does your solution have the ability to collect and process information in order to sell a license or permit? |  |  |
|  | Does your solution display products available for sale based on customer eligibility, i.e., age or residency? |  |  |
|  | Does your solution provide a description of each product available for sale to assist customers in selecting the correct product for purchase? |  |  |
|  | Does your solution indicate which products, if any, are not available for purchase? |  |  |
|  | If a product is not available for sale, does your solution provide an explanation as to why? |  |  |
|  | Does your solution prevent duplicate licenses or permits from being purchased (unless duplicate licenses or permits are allowable)? |  |  |
|  | Does your solution allow a customer to purchase multiple products in the same transaction? |  |  |
|  | Does your solution prompt a customer to purchase other required products? For example, if a customer selects a tag for purchase, your solution would check to make sure the customer has an active license, and if they do not, your solution would prompt the customer to purchase the required license. |  |  |
|  | Does your solution provide an express shopping option for repeat customers or customers who know what they want to purchase (ex. customer buys this year’s version of the hunting license they purchased last year)? |  |  |
|  | Does your solution allow customers to purchase items for themselves and others in the same purchase transaction? |  |  |
|  | Does your solution associate each item purchased with the customer's account for whom the item was purchased? |  |  |
|  | Does your solution assign a unique number to each license and permit sold? |  |  |
|  | Does your solution associate the unique license or permit number with a customer ID? |  |  |
|  | Does your solution allow licenses or permits to be assigned a status, e.g., active, inactive, voided? |  |  |
|  | Does your solution maintain an audit trail of status changes? |  |  |
|  | Does your solution prompt the customer to electronically sign affidavits stating all information is true and correct, if applicable? |  |  |
|  | Does your solution support licenses to be displayed electronically? Please describe the measures taken to ensure electronic licenses are secure and forge-proof. |  |  |
|  | Does your solution take measures to help prevent forgery of a license or permit? |  |  |
|  | Does your solution take measures to prevent the manipulation of the license or permit information? |  |  |
|  | Does your solution allow fulfillment of licenses via a hard plastic card? |  |  |
|  | Does your solution format licenses and permits to print on 8 ½ X 11 paper? |  |  |
|  | Does your solution provide the ability to print and/or display a single license document containing all active licenses and including license expiration dates for a customer? |  |  |
|  | Does your solution provide the ability to search for and re-print a license or permit? |  |  |
|  | Does your solution provide the ability to reprint any active license or permit? |  |  |
|  | Does your solution generate a reprinted license in which the physical output is identical to the original? |  |  |
|  | Does your solution clearly mark a reprinted license as a reprint? |  |  |
|  | Does your solution limit the number times a license or permit may be reprinted? |  |  |
|  | Does your solution note each reprint on the customer’s account? |  |  |
|  | Does your solution notify customers of an approaching expiration of a license or permit? |  |  |
|  | Does your solution provide an authorized user with the ability to void and/or refund a license or permit purchase? |  |  |
|  | Does your solution record the reason for a void or refund? |  |  |
|  | Does your solution allow the reason for the void or refund to be selected from a list of pre-defined reason codes? |  |  |
|  | Does your solution reflect items refunded in the customer’s order history? |  |  |
|  | Does your solution prevent the reprint of any voided or refunded licenses and permits? |  |  |
|  | Does your solution make a license or permit inactive after successfully processing a void or refund? |  |  |
|  | Does your solution exclude voided or refunded licenses when calculating license quantity limits, if any? |  |  |
|  | Does your solution provide an authorized user with the ability to revoke a license or permit? |  |  |
|  | Does your solution record the reason for the revocation and the start and end date? |  |  |
|  | Does your solution restrict a revoked license from being reprinted? |  |  |
|  | Does your solution restrict a customer who holds a revoked license from purchasing the exact license type? |  |  |
| **License and Permit Internet Sales** | | | |
|  | Does your solution provide the customer with easy-to-follow instructions for printing or electronically saving their license or permit? |  |  |
|  | Does your solution deliver the license document and other ODWC information electronically to the customer? |  |  |
| **License and Permit IPOS Dealer Sales** | | | |
|  | Does your solution have an architecture that is specific for IPOS Sales? Please describe the proposed architecture in detail. |  |  |
|  | Does your solution provide an abbreviated sales process, i.e., “express” sales flow for IPOS Dealers? |  |  |
|  | Does your solution prompt users with step-by-step procedures for completing a sales transaction? |  |  |
|  | Does your solution allow the step-by-step procedures be turned on and off based on user preference? |  |  |
|  | Does your solution allow the IPOS Dealer to provide the license or permit to the customer in their preferred delivery method – electronic or hardcopy? |  |  |
|  | Does your solution allow agents to void licenses issued in error?  If so, please describe the solution’s workflow process as it relates to voiding transactions. Include specifics such as which users are allowed to void transactions, the timeframe within which each user must complete the void, how voids are recorded and reflected in the solution, and when a Dealer’s account is credited. |  |  |
|  | Does your solution invalidate privileges associated with a license that is voided? |  |  |
| **Specialty Licenses and Permits** | | | |
|  | Does your solution provide workflow capabilities to facilitate application and approval process for licenses and permits that require additional customer documentation and review by ODWC, such as commercial permits and tribal licensing?  Please describe. |  |  |
|  | Does your solution allow the customer to view the status of their specialty license or permit application online? |  |  |
|  | Does your solution allow customer to view the status of their application, and generate and send status notifications to the customer about their specialty license or permit application via their preferred communication channel? |  |  |
|  | Does your solution issue licenses or permits that do not have an associated dealer fee? |  |  |
| **Charitable Donations** | | | |
|  | Does your solution allow a customer to make a donation to various programs administered by ODWC? |  |  |
|  | Does your solution display donations by customers to ODWC programs as individual lines on the customer receipt? |  |  |

|  | **Requirements** | **A** | **B** |
| --- | --- | --- | --- |
| **Product Management** | | | |
|  | Does your solution have a product catalog that manages products for sale?  If so, please describe the process for creating and managing products and the attributes that are maintained for each product. |  |  |
|  | Does your solution provide the ability to designate which eligibility criteria (singular or in combination) are mandatory for each product? |  |  |
|  | Does your solution allow each product to have a unique time period for which the product is valid? |  |  |
|  | Does your solution allow licenses to be sold for a valid time period in the future, e.g., customer buys a 12 month license in December, but the valid time period does not start until January? |  |  |
|  | Does your solution provide the ability to have multiple pricing rules for each product (e.g., price of Fishing Guide is discounted for those with Coast Guard Credentials)? |  |  |
|  | Does your solution maintain the history of pricing for each product? |  |  |
|  | Does your solution provide the ability to manage the type of information that should be included on the product when fulfilled, including but not limited to the following:  □ License/Document Number □ Authorized year and season (valid dates) □ Customer name, address, DOB □ Customer Id □ Original issue date □ Replacement/reprint/correction date |  |  |
|  | Does your solution provide the ability to update the product description that appears in the sales system(s) and/or prints on product outputs? |  |  |
| **Business Rules** | | | |
|  | Does your solution issue all products using designated business rules? |  |  |
|  | Does your solution use dynamically stored and updateable, ODWC-defined business rules to determine which products or combination of products to recommend to a customer? |  |  |
|  | Does your solution use dynamically stored and updateable, ODWC-defined business rules to determine which products a customer is eligible to purchase? |  |  |
|  | Does your solution have the ability to restrict a customer purchase if they do not meet the eligibility criteria as defined by the business rules? |  |  |
|  | Does your solution allow eligibility criteria to be set to “by-pass” so to not prevent a successful sale? |  |  |
| **Payment Processing** | | | |
|  | Does your solution collect payment using designated business rules? |  |  |
|  | Is your solution PCI (Payment Card Industry data security standard) compliant? |  |  |
|  | Is your solution IAT (International ACH (Automated Clearing House) Transaction) compliant? |  |  |
|  | Is your solution NACHA (National Automated Clearing House Association) compliant? |  |  |
|  | Does your solution have the ability to use batch processing? |  |  |
|  | Does your solution have the ability to use ACH Batch processing? |  |  |
|  | Does your solution track transactions, including potentially fraudulent activities? |  |  |
|  | Does your solution support electronic payments? Please detail which type of electronic payments your solution supports (echecks, ACH, credit card, etc.) and detail any other forms of payment supported. |  |  |
|  | Does your solution use a payment gateway?  Please describe the proposed payment gateway and merchant account holder for each sales channel (online, IPOS Dealer location, phone and in-person at a ODWC location). |  |  |
|  | Does your solution calculate and display the total of all items selected for purchase? |  |  |
|  | Does your solution provide the ability to review and edit items selected for purchase before completing the sale? |  |  |
|  | Does your solution collect payment in accordance with the defined business rules? |  |  |
|  | Does your solution provide cash drawer capabilities? |  |  |
|  | Does your solution generate receipts? |  |  |
|  | Does your solution allow for multiple tender types to be accepted for the same transaction?  Please describe the refund process when the original payment included multiple payment types. |  |  |
|  | Does your solution display the remaining balance due after a partial payment has been entered? |  |  |
|  | Does your solution require full remittance before transactions are finalized and products are issued? |  |  |
|  | Does your solution allow each IPOS License Dealer to have an individual defined billing cycle (i.e., one agent may be monthly and another may be weekly)? |  |  |
|  | Does your solution generate itemized invoices based on sales and refunds/voids for POS Agents according to their defined billing cycle? |  |  |
|  | Does your solution flag all payments returned for insufficient funds?  Please describe the NSF collection process. |  |  |
|  | Does your solution retain all invoices, for some specified time period, for later retrieval? |  |  |
| **Finance** | | | |
|  | Does your solution associate products with one or more revenue codes? |  |  |
|  | Does your solution require that each product have at least one revenue code designated? |  |  |
|  | Does your solution allow revenue to be allocated to multiple codes based on a dollar or a percentage basis? |  |  |
|  | Does your solution provide financial accuracy to the nearest penny? |  |  |

|  | **Requirements** | **A** | **B** |
| --- | --- | --- | --- |
| **Customer Management** | | | |
|  | Does your solution use a customer account to track information about the customer and the transactions they execute or their activities with the agency?  If so, please describe the information the solution captures about a customer, the process for gathering the information, as well as the means used to prevent duplicate records. Explain account creation for license buyers vs. non-license buyers. If a customer account is not used, please describe the customer tracking method used. |  |  |
|  | Does your solution create a customer account and customer ID for each record converted from the legacy solution to the new solution? |  |  |
|  | Does your solution allow an account to be created, or customer information to be updated such as address or email, without having to complete a purchase? |  |  |
|  | Does your solution accept customer data by scanning a driver’s license barcode in order to populate the personal information required for the customer account? |  |  |
|  | Does your solution maintain multiple addresses for each customer (i.e., mailing address, billing address, physical address)? |  |  |
|  | Does your solution use address verification technology? |  |  |
|  | Does your solution maintain detail on or validate a customer's eligibility to purchase an item, such as, revocation status or hunter education? |  |  |
|  | Does your solution allow compatibility with current modules for cross reference (e.g., DPS residency checks, Hunter Education, Aquatic Education and other program data)? |  |  |
|  | Does your solution gather and maintain information about a customer's needs and interests? |  |  |
|  | Does your solution provide product recommendations to customers for which they are eligible based on their past activity and the activity of other customers with similar profiles or transaction history? |  |  |
|  | Does your solution generate and maintain a unique ID (customer ID) for each customer, either system generated or other? |  |  |
|  | Does your solution link the customer ID to a customer account? |  |  |
|  | Does your solution maintain only one customer account for each customer? |  |  |
|  | Does your solution assign customer IDs to non-license buyers (e.g., merchandise purchasers or wildlife violators)  If so, please describe how your solution creates accounts across types and how data is homogenized. |  |  |
|  | Does your solution provide the ability to combine customer records in order to manage duplicate records? |  |  |
|  | Does your solution allow a customer to look up their account once security measures are met? |  |  |
|  | Does your solution allow administrative users, with proper permissions, to look up a customer's account once security measures are met? |  |  |
|  | If a customer account search yields several matches, does your solution prompt the customer to call Customer Service to retrieve their customer ID number? |  |  |
|  | Does your solution store session variables for customers to recover from timely disconnects (e.g. new customer information before a customer ID has been generated)? |  |  |
| **License Dealer Management** | | | |
|  | Does your solution use a Dealer account to maintain information about the Dealer and the transactions they process? |  |  |
|  | Does your solution have the ability to update Dealer information, such as address or email? |  |  |
|  | Does your solution maintain a unique ID (Store ID) for each License Dealer, either system generated or other? |  |  |
|  | Does your solution allow the Store ID to incorporate a company identifier and a store or location identifier? |  |  |
|  | Does your solution link the Store ID to a dealer account? |  |  |
|  | Does your solution maintain only one dealer account for each License Dealer? |  |  |
|  | Does your solution setup and train existing License Dealers as part of solution implementation? |  |  |
|  | Does your solution set-up and train new License Dealers during and after solution implementation? |  |  |
|  | Upon creation of a new dealer account, does your solution contact the new License Dealer and verify the dealer's address and contact information? |  |  |
|  | Does your solution provide an Online Training Manual for License Dealers? |  |  |
|  | Does your solution update the Online Training Manual every 6 months or more frequently as needed? |  |  |
|  | Does your solution use a unique user login ID for each license dealer user? |  |  |
|  | Does your solution provide the ability for an authorized user to manage dealer account login IDs and permissions? |  |  |
|  | Does your solution support at least one Administrator for each dealer account? |  |  |
|  | Does your solution support at least one second-tier Administrator for each License Dealer location when a dealer has multiple locations? (ex. Administrator for Wal-Mart as a group then one for each Wal-Mart location) |  |  |
|  | Does your solution notify the designated dealer account Administrator for each dealer account of their login ID? |  |  |
|  | Does your solution allow the dealer account Administrator to set up multiple users at the dealer location(s)? |  |  |
|  | Does your solution provide the ability to manage the products that each dealer account can transact? |  |  |
|  | Does your solution provide the ability for License Dealers to print or otherwise access transaction data sufficient for them to balance their financial systems? |  |  |
| **Help Desk** | | | |
|  | Does your solution provide Help desk services?  If so, please provide a proposed structure for a Help Desk function, including division of responsibility between ODWC and the Vendor, services provided and hours of coverage. |  |  |
|  | Does your solution provide a Frequently Asked Questions feature? If so, please describe. |  |  |
|  | Does your solution allow authorized users to search for and look up POS License Agent and customer records? |  |  |

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|  | **Requirements** | **A** | **B** |
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| **Game Check** | | | |
|  | Does your solution provide the ability to collect and maintain species harvest reporting information through online game check stations?  If so, please describe the data collection process and detail the data elements that are collected. Please also describe the length of time that harvest report data is stored. |  |  |
|  | Does your solution allow for entry of data collected from physical check station books that are used in checking game not included in ODWC’s existing online check station (antelope, bear, deer management assistance program, Controlled Hunts)? |  |  |
|  | Does your solution have the ability to interface with ODWC's existing SQL database used for the Online Check Station, as well as validate licenses or mark them as used? |  |  |
|  | Does your solution allow for game to be checked electronically through a mobile app or responsive design? |  |  |
|  | Does your solution provide the ability to edit data collection requirements when reporting requirements change? |  |  |
|  | Does your solution generate a unique Game Check Report Number after the game check is completed? |  |  |
|  | Does your solution associate the Game Check Confirmation Number to a customer ID? |  |  |
|  | Does your solution associate the Game Check Report Number to a license number for licensed hunters? |  |  |
|  | Does your solution allow license exempt hunters to check game? |  |  |
|  | Does your solution prevent duplicate game checks? |  |  |
|  | Does your solution identify customers who have exceeded their tag limits per species? |  |  |
| **Controlled Hunts/Private Lands Youth Hunts** | | | |
|  | Does your solution provide the ability to complete and submit an application for each controlled hunt online? |  |  |
|  | Does your solution allow a customer to complete submit an application online as a stand-alone transaction that collects an application fee without having to purchase a license? |  |  |
|  | Can your draw solution be modified based on various criteria? Examples include:   * Landowner applicants applying based on minimum acreage and drawn with weighted average based on size of property * Transfer of permits from successfully drawn applicant to another sportsman |  |  |
|  | Does your solution display a description of each hunt, as published on the Controlled Hunts page of the ODWC website? |  |  |
|  | Does your solution allow for the definition of a specific time frame for when an application can be accepted? |  |  |
|  | Does your solution maintain all application information and its ultimate resolution?  Please describe the length of time for which application and decision information is maintained. |  |  |
|  | Does your solution prevent the submission of an application for a hunt where the application due date has passed? |  |  |
|  | Does your solution allow hunters to select a maximum number of available hunts and their preferred options? Many hunts have different options. |  |  |
|  | Does your solution execute the drawing of all controlled hunts by randomly selecting qualified applications with inclusion of preference points? |  |  |
|  | Does your solution allow for preference points to be acquired in the categories in which a hunter is not drawn?  Please describe the use of preference points as it relates to applications and the hunt drawing. |  |  |
|  | Does your solution exclude incomplete applications and those that do not meet the business rules from the drawing? |  |  |
|  | Does your solution check for duplicate applications (where multiple applications are not allowed)? |  |  |
|  | Does your solution allow a customer to view the status of their application(s)? |  |  |
|  | Does your solution communicate the results of the drawing to customers?  If so, please describe the process and the various communications methods used. |  |  |
|  | Does your solution allow selected hunters to download all the necessary documentation for the hunt? |  |  |
|  | Does your solution take measures to prevent tampering of the hunt document text? |  |  |
|  | Does your solution require payment of any fees before final hunt permits can be downloaded and printed? |  |  |
|  | Does your solution allow hunters to view past selections? |  |  |
|  | Does your solution provide live operator assistance (via a toll free phone number provided by the Vendor) between 8:30 AM and 5:00 PM Eastern Monday through Friday (except national holidays) during the time of the year when applications are being accepted? Operator to perform the following:   * Provide general and technical assistance to those applicants in need of help * Issue refunds when approved by ODWC or when determined to be an erroneous charge * Answer questions from ODWC staff and hunt managers about the status or history of a particular applicant * Answer questions from an applicant about their application history, their selection status, etc. |  |  |
|  | Does your solution allow authorized users to view/edit details of a hunt and manage aspects of the hunts as permitted? |  |  |
|  | Does your solution process group hunt applications? If so, please describe the workflow process. |  |  |
|  | Does your solution link a group hunt application to the individual customer IDs associated with the application? |  |  |
|  | Does your solution provide canned reports (e.g. draw results, fees collected, etc) in addition to ad-hoc or on request transaction and application decision history? |  |  |
|  | Does your solution provide an electronic distribution channel for permits, such as printing directly from the results website?  If so, please describe. |  |  |
| **Harvest Information Program (HIP)** | | | |
|  | Does your solution enable the electronic reporting of migratory game harvest to US Fish and Wildlife Services? |  |  |
|  | Does your solution prompt customers to record survey information? Please describe the process. |  |  |
|  | Does your solution require respondents to have a customer account to complete a HIP survey? |  |  |
|  | Does your solution allow the price of a HIP permit to differ based on sales channel (IPOS vs Online)? |  |  |
|  | Does your solution generate a HIP number once the survey has been completed? |  |  |
|  | Does your solution associate the HIP number with a customer ID, if one exists? |  |  |
|  | Does your solution indicate the HIP number on the customer's license? |  |  |
|  | Does your solution store survey responses? Please detail the length of time for which responses are stored. |  |  |
| **Reporting** | | | |
|  | Does your solution provide the ability for authorized users to retrieve and export data on the following:   * Volume of sales, voids and refunds by license type? * Customer demographics? * Long term customer purchasing patterns? * Customer participation across programs? * Detailed Harvest data? * Game check exceptions that identify customers who have exceeded their tag limits per species? * Violator Compact and Child Support Revocations * Revenue bank deposit details * Tender reports and sales reports by clerk/terminal/time to balance actual tender collected to the value of items sold by the clerk.   If not provided above, please describe the various reporting capabilities your solution provides. |  |  |
|  | Does your solution provide the ability to export reports for third party fulfillment, such as the Federal Duck E-Stamp report described in Section D? |  |  |
|  | Does your solution have standard canned reporting capabilities? Please describe types of reports available. |  |  |
|  | Does your solution generate standard reports in accordance with a pre-defined schedule, with recurring frequency, and using pre-defined parameters? |  |  |
|  | Does your solution distribute standard reports to pre-defined recipients, including both individuals and distribution groups? |  |  |
|  | Does your solution allow standard report parameters to be modified over time as needed (e.g. granular detail level)? |  |  |
|  | Does your solution provide an interactive, dynamic, ad hoc reporting capability that enables end-users to create reports? |  |  |
|  | Does your solution allow ad hoc reports to be memorized and repeated in the future? |  |  |
|  | Does the solution's ad hoc reporting tool allow end-users can generate reports from any Internet connection? |  |  |
|  | Does the solution's ad hoc reporting tool allow for reports to be displayed on both computers and mobile devices? |  |  |
|  | Does the solution's ad hoc reporting tool allow end-users to dynamically modify report views and parameters using drag-and-drop and similar functionality? |  |  |
|  | Does the solution's ad hoc reporting tool allow report data to be displayed in charts, tables, etc.? |  |  |
|  | Does the solution capable of using data from multiple, disparate sources with which the solution interfaces? |  |  |
|  | Does your solution have an interactive management dashboard function that displays real-time and historical operational data? |  |  |
|  | Does your solution provide a dashboard that is populated based on the user selecting information and metrics from a pre-defined list of information and metrics availa195ble?  If so, please describe such function, including examples of GUI and specifics of customer details. |  |  |
|  | Does your solution allow reports to be sent via email or as a dynamic link? |  |  |
|  | Does your solution support the secure export of data for use outside of the system?  Describe the formats and limitations for exporting data from the new solution. |  |  |
|  | Does your solution have a process for archiving data? |  |  |
| **Mobile App** | | | |
|  | Does your solution provide a native mobile app for both iOS and Android platforms?  Please describe. |  |  |
|  | If a native mobile app for the items described in Question 195 is not available, please describe how your solution addresses mobile optimization. |  |  |
|  | Does your solution maintain the app and be responsible for posting and updating the app through the various app stores? |  |  |
| **Communications** | | | |
|  | Does your solution provide the ability to build a customizable survey and store the results? Customers should be prompted to complete the survey when they select a product with a survey designation set in the product catalog). |  |  |
|  | Does your solution provide the ability to target customers, both specific and randomly selected, based on user-defined criteria?  If so, please describe. |  |  |
|  | Does your solution provide an opt-out feature? |  |  |
|  | Does your solution allow customers to choose their preferred method of communication?  If so, please describe the communication methods supported. |  |  |
|  | Does your solution send renewal reminders to customers with expiring products? |  |  |
|  | Does your solution provide access to a current version of the Regulations? |  |  |
|  | Does your solution automatically send regularly recurring department communications such as the Fishing Report to customers who have not opted out?  Please describe the functionality of these communication channels (email, text, etc). |  |  |
|  | Does your solution have the ability to flag rejected emails and text messages? |  |  |
|  | Does your solution generate general and targeted mailing lists based on user defined list criteria? |  |  |
|  | Does your solution allow mailing lists to be formatted for printing mailing labels? |  |  |
|  | Does your solution provide the ability to send alerts or messages to users when they log into the solution? |  |  |
|  | Does your solution allow alerts to be sent to all or be targeted to certain agents? |  |  |
|  | Does your solution have the capability to post announcements on the website regarding scheduled downtime? |  |  |
| **Law Enforcement** | | | |
|  | Does your solution provide specialized access for law enforcement to real time customer information and their account history detailing license/permit, citations, and game check data?  If so, please explain how information will be accessed and how connectivity in remote areas will be addressed. |  |  |
|  | Does your solution allow for citations to be entered by law enforcement officers? |  |  |
|  | Does your solution allow for issuance of depredation permits, temporary licenses, and administrative fines by law enforcement officers?  If so, please describe what sales channel is used, functionality (including payments), and how connectivity in remote areas will be addressed. |  |  |
| **Web Hosting** | | | |
|  | Is your solution a hosted solution or on-prem solution? |  |  |
|  | Does your solutions use the ODWC’s standard data format, MSSQL?  If so, how does your solution interface with this format? |  |  |

|  | **Requirements** | **A** | **B** |
| --- | --- | --- | --- |
| **General/Technical** | | | |
|  | Does your solution include a dedicated Development environment? |  |  |
|  | Does your solution include a dedicated User Acceptance Testing (UAT) environment? |  |  |
|  | Does your solution include a dedicated Production environment? |  |  |
|  | Does your solution have a testing/release process?  Please describe and include what procedures it includes. |  |  |
|  | Does your solution allow for the managing of upgrades? Please describe the process. |  |  |
|  | Does your solution allow for access via a computer or mobile device with internet connectivity? |  |  |
|  | Does your solution require a minimum throughput?  Please list specific browsers for which the solution is not compatible, if any. |  |  |
|  | Does your solution use a responsive design for use with mobile devices? |  |  |
|  | Does your solution log performance measures such as length of transaction time, etc.? If so, please describe the solution’s standard performance measures. |  |  |
|  | Does your solution integrate with the ODWC website? |  |  |
|  | Does your solution prevent display of any advertising unless explicitly authorized by ODWC? |  |  |
|  | Does your solution allow for system administration capabilities? Please describe. |  |  |
|  | Does your solution use role-based access controls?  Please detail the solution approach to role based permissions. |  |  |
|  | Does your solution provide secure, remote access for conducting system administrator functions? |  |  |
|  | Does your solution time out after a specific period of inactivity? |  |  |
|  | Does your solution discard all data related to incomplete transactions? |  |  |
|  | Does your solution provide data conversion from legacy ODWC systems? Please detail the data conversion process; including, division of responsibilities between ODWC and the Vendor and the proposed number of years of historical data to be converted. |  |  |
|  | Does your solution create a customer account and customer ID for each record converted? |  |  |
|  | Does your solution employ interactive help features for specific data elements to offer explanations (e.g. mouse-overs, pop-ups, etc.)? |  |  |
|  | Does your solution perform basic and table-driven validations such as, required field is empty, invalid entry (such as too many or not enough digits in a SSN) and invalid character(s) in a field? |  |  |
|  | Does your solution perform address validations? Please describe validation source. |  |  |
|  | Does your solution validate email addresses? If so, please describe validation process. |  |  |
|  | Does your solution discard data designated as needing validation that does not pass validation? |  |  |
|  | Does your solution generate meaningful and easy-to-understand error messages for data issues? |  |  |
|  | Does your solution comply with all current State of Oklahoma State Security Policy, Procedures, and Guidelines, as applicable, found at:  <https://www.ok.gov/cio/documents/InfoSecPPG.pdf>.  If proposed solution does not, please provide details that specify the Standard/Policy and how Vendor solution does not comply. |  |  |
|  | Does your solution incorporate the use of Social Media? If so, is your solution compliant with the Oklahoma State Social Networking and Social Media Policy and Standards as specified in:  <https://www.ok.gov/cio/Policy_and_Standards/Social_Media/> |  |  |
|  | Does your Solution provide effective, interactive control and use and compliance with the State of Oklahoma standards regarding IT Accessibility Compliance:  <https://www.ok.gov/cio/documents/isd_itas.doc>  If yes, please describe how this functionality is achieved.  If no, does your solution provide alternate accessibility functionality? Please describe. |  |  |
|  | Does your solution use the most current technologies available? Please describe. |  |  |
|  | Does your solution operate in a real-time, integrated transactional environment? |  |  |
|  | Is your solution end-user equipment agnostic? |  |  |
|  | Does your solution have a capacity planning methodology for managing high/low use levels? Please describe. |  |  |
|  | Is your solution scalable to allow for increases in users and functional capacity without degrading performance? |  |  |
|  | Is your solution designed such that compromised functions, errors or faults will not degrade the overall integrity of the system? |  |  |
|  | Does your solution provide the capability to interface with ODWC systems to obtain information? |  |  |
|  | Does your solution provide secure FTP (File Transfer Protocol) as part of your Solution? |  |  |
|  | Does your solution use a relational database design? |  |  |
|  | Does your solution employ interactive search functionality that is capable of pulling search results from multiple sources? |  |  |
|  | Does your solution interface with touch screen devices and self-service kiosks? |  |  |
|  | Does your solution provide a consistent and standard design style sheet for all modules using the same page layouts, color scheme and data fields? |  |  |
|  | Does your solution support multiple languages (English, Spanish, etc.) for page content? If so, what languages? |  |  |
|  | Does your solution provide the ability to monitor the system for breaches and intrusions and log attempts?  Please describe what occurs when an attempted system breach or intrusion is identified, as well as a description of insurance coverage for possible breaches. |  |  |
|  | Has your company had any security breaches within the last five years?  If so, please describe the type of breach and the remedy. |  |  |
|  | Does your solution alert designated persons when performance issues arise? |  |  |
|  | Does your solution provide escalation alerts for system issues? |  |  |
|  | Does your solution maintain logs of all system access/log-on attempts, successful or not? |  |  |
|  | Does your solution maintain logs of all system activity? |  |  |
|  | Does your solution maintain logs of all system errors? |  |  |
|  | Does your solution issue alerts if an interface or data source becomes unavailable? |  |  |
|  | Does your solution issue alerts if the system becomes unavailable? |  |  |
|  | Does your solution provide web analytics for monitoring visitor traffic and usage of the website? |  |  |
|  | Does your solution notify online users of scheduled downtime when they log in (if they are trying to interact with the system during or immediately prior to a maintenance period). |  |  |
|  | Does your Solution include an escrow process, as required by Oklahoma law? If yes, explain your escrow process and provide a copy of Vendor’s escrow agreement. |  |  |
|  | Does your solution have the ability to scale up/down support services as needed (help desk, development, etc.)? |  |  |
|  | Does your solution save customer credit card information? If so, please describe. |  |  |
|  | Does your solution handle on-line purchases through a Secure Shopping Cart, a Secure Page or a Secure Form plug-in? |  |  |
|  | Does your solution mask SSN data in maintenance logs, customer logs, and printed documents (including licenses)? |  |  |
| **Hosting** | | | |
|  | Does your solution have the ability to manage web servers/app servers, etc.? Explain, to include redundancies, expandability, capacity management, and monitoring. |  |  |
|  | Does your solution provide a physical location within the United States for all solution components including, but not limited to, data centers, infrastructure, network, hardware, and software? |  |  |
|  | Does your solution provide for hosting in a Tier 4 secure facility? |  |  |
|  | Does your solution provide for hosting in an environment with a redundant power source? |  |  |
|  | Does your solution provide a redundant architecture that is supported by multiple geographically diverse data centers? |  |  |
|  | Does your solution’s system architecture provide route diversity between the primary data center and the backup/redundant data center? |  |  |
|  | Does your solution provide the backup, fail-over site with performance levels identical to the primary site? |  |  |
|  | Does your solution provide the capability to remain operational in the event of loss of availability of one or more data sources? |  |  |
|  | Does your solution provide components that are physically and logically segregated from the components of other systems? |  |  |
|  | Does your solution use hardware that is dedicated to the ODWC solution? If not, please explain. |  |  |
|  | Does your solution provide data backup? Please describe the approach and the location of where backup will be stored. |  |  |
| **Minimum Performance Volumes** | | | |
|  | Does your solution process a minimum of 10,000 transactions simultaneously? |  |  |
|  | Does your solution support up to 150 concurrent internal ODWC users? |  |  |
|  | Does your solution handle up to 21,000 customer service calls a month during peak periods? |  |  |
|  | Does your solution handle up to 500 License Dealer users online simultaneously during peak periods? |  |  |
|  | Does your solution handle a minimum of 250 different products? |  |  |
|  | Does your solution handle at least 3 million sales a year? |  |  |
|  | Does your solution handle up to 30,000 Controlled Hunt applications during a six week application period? |  |  |
|  | Does your solution handle a minimum of 10,000 transactions in a 10 minute window? |  |  |
|  | Does your solution store up to 10 million customer records? |  |  |
|  | Does your solution store up to 40 million database records? |  |  |
|  | Does your solution handle Controlled Hunts applications involving up to 30,000 transactions in a 24-hour window? |  |  |
| **Warranty, Maintenance, and Operations** | | | |
|  | Does your solution provide warranty support and maintenance? Please include specifics as to when the warranty begins and the duration of the warranty. |  |  |
|  | Does your solution provide the most recently available version(s) of software, operating systems and database management systems are used at the time of deployment? Describe the proposed approach. |  |  |
|  | Does your solution provide on-going upgrades throughout the life of the contract? |  |  |
|  | Does your solution provide maintenance and on-going technical assistance for the hosted solution, including the proposed levels of support and application fix resolution times? |  |  |

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