REQUEST FOR PROPOSAL

INFORMATION TECHNOLOGY SERVICES DEPARTMENT

Intranet Information Portal

City of Ann Arbor
Information Technology Services
Steven Hampton, Director
RFP # 577
February 19, 2004

Due Date: March 12, 2004
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DUE DATE: MARCH 12, 2004

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1 INTRODUCTION

1.1 THE REQUEST FOR PROPOSAL
The City of Ann Arbor is seeking proposals for the development and implementation of a web-based Intranet Information Portal based on the use of Enterprise Information Portal technology to be initially implemented as an Employee Intranet. This project seeks to acquire a fully functional system.

1.2 TURNKEY SYSTEM
All proposals shall be for the entire system as specified. The Respondent is to ensure that a complete, integrated, “Intranet Information Portal” is proposed and that nothing remains to be purchased or supplied by the City of Ann Arbor other than those items so indicated. Proposal award for the “Intranet Information Portal” will be made to a single respondent who will assume responsibility for supplying and installing software, and performing system testing of equipment and related materials provided under these specifications. The package must include all application software, interface software, and all system software necessary for support of the proposed system and any other programs contained within the proposal submitted by the Respondent and purchased by the City. The package must also include the necessary licenses or assignment of licenses to the City of Ann Arbor for all software in the package.

These specifications may not necessarily list all equipment or software required to produce a fully operational system that will satisfy the City’s requirements. It shall be the responsibility of the Respondent to verify the completeness of the equipment list and warrant the merchantability of the equipment to meet total requirements of the system.

The Respondent shall provide any equipment or special installations required by the performance specifications and not specifically mentioned herein without claim for additional payment.

1.3 PROJECT SCHEDULE

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<tr>
<td>February 20, 2004</td>
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<td>Pre-Proposal Meeting – 2:00 PM EST</td>
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</tr>
</tbody>
</table>

Note: This schedule is included for information purposes only and may be subject to change at the City’s discretion.
* Subject to change based on the Proposal time line submitted and acceptance of same by City.

1.4 ISSUING OFFICE
Purchasing Division
City of Ann Arbor
100 N. Fifth Avenue
P.O. Box 8647
Ann Arbor, MI 48107-8647
(734) 994-2720
1.5 CONTRACT ADMINISTRATION
Following the signing of the contract, all communications concerning the contract must be directed to:

Steven Hampton, Director, Information Technology Services
City of Ann Arbor
100 N. Fifth Avenue
P.O. Box 8647
Ann Arbor, MI 48107-8647
Telephone  (734) 994-2795
Fax    (734) 994-3031

1.6 PRE-PROPOSAL MEETING
A pre-proposal meeting and facility walk-through will be held on Wednesday, March 3, 2004 at 2:00 p.m. in the Council Chambers, located on the second floor of City Hall, 100 N. Fifth Ave. Ann Arbor, Michigan. Attendance will be limited to three (3) persons per firm. It is strongly suggested that each interested party attend this meeting. Those attending the conference will be required to sign a non-disclosure agreement.

1.7 PROPOSAL
Original plus Six (6) copies of the proposal shall be submitted. The information included therein should be as concise as possible.

To be considered, each firm must submit a complete response to this RFP using the Format found in Section 2 of this RFP. No other distribution of proposals is to be made by the submitter. The Signature Page of this RFP, Legal Status of Respondent, Living Wage Compliance Form and the Contract Compliance Form must be completed and returned with the proposal. An official, authorized to bind the submitter to its proposal provisions, must sign each proposal copy in ink.

Each proposal must remain valid at least one hundred twenty (120) days from the due date of this RFP.

1.8 SELECTION CRITERIA
Responses to this RFP will be evaluated using a point system, described in Sections 2.9, 2.10 & 2.11. The evaluation will be completed by a selection committee composed of staff members from various departments of the City.

The Selection Committee will initially evaluate responses to the RFP to decide which Respondent(s), if any, they will interview. For the initial evaluation, they will not consider the fee proposals. The fee proposal(s) of the highest rated Respondent(s) selected will be opened and reviewed before the interview(s). The selected Respondent(s) will have the opportunity to discuss in more detail their qualifications, their experience and fee proposal during the interview process. To decide the most qualified, capable and cost-effective Respondent, the Selection Committee will evaluate the proposal(s) and interview(s) using the point system described in Section 2 of this RFP.

Satisfactory past performance and demonstrated ability to provide the City’s minimum desired quality will be a factor in City’s evaluation of a prospective Respondent’s offer for consideration of City’s award. The City may also take into consideration a Respondent’s ability to implement an Intranet Information Portal in stages that will meet the City’s evolving needs and ability to fund.

1.9 CHANGES IN THE RFP
Should any prospective Respondent be in doubt as to the true meaning of any portion of this RFP, or should the Respondent find any ambiguity, inconsistency, or omission therein, the Respondent shall make a written request for an official interpretation or correction. Such requests must be submitted to the issuing office not less than seven (7) days prior to the final date of submittal of the proposals. The person making the request shall be held responsible for its prompt delivery.

The City’s staff will make such interpretation or correction, as well as any additional RFP provisions that the City may decide to include, only as an RFP addendum. Staff will mail or deliver addendums to each prospective Respondent recorded as having received a copy of the RFP. Any addendum issued by the City shall become a part of the RFP. Respondents should consider issued addendums in preparing his or her proposal. Only addenda duly issued by the City shall be binding.
1.10 PROPOSAL RECEIPT
Proposals must be received by the City of Ann Arbor, Purchasing Division, 3rd Floor, City Hall, 100 N. Fifth Ave., Ann Arbor, Michigan 48107 on or before 2:00 PM, Friday, March 12, 2004. Prospective submitters are responsible for the timely receipt of their proposal. All proposals become the property of the City of Ann Arbor once received, whether awarded or rejected. LATE PROPOSALS WILL NOT BE CONSIDERED.

1.11 DISCLOSURES
All information in a submitter’s proposal is subject to disclosure under the provisions of Public Act No. 442 of 1976 known as the “Freedom of Information Act”. This act also provides for the complete disclosure of contracts and attachments thereto except where specifically exempted under the Freedom of Information Act.

1.12 CONTRACT
The Respondent selected to do business with the City of Ann Arbor will be required to execute the standard Agreement with the City (a specimen copy is included with this RFP as Attachment B). The City will not entertain requests to revise, amend, or change the language of the standard Agreement except where necessary to incorporate the scope of services and compensation for same as awarded. Proposal submitters must base their proposal on the assumption that, if selected, they will execute the City’s standard Agreement.

The Respondent selected to provide the system and services requested under this RFP will be required to execute the contract and furnish all required supporting documentation (see specimen contract) within fifteen (15) days of the award of the contract.

1.13 COST LIABILITY
The City accepts no financial responsibility for costs incurred by any Respondent in responding to this RFP. By responding to this RFP the Respondent agrees to not hold the City responsible if parties other than the City without their consent obtain material from its proposal.

1.14 NON-DISCRIMINATION BY CITY CONTRACTOR(S)
All contractors proposing to do business with the City of Ann Arbor, except those specifically exempted by regulations promulgated by the Administrator and approved by City Council shall receive approval from the City prior to entering into a professional services agreement with the City. Said firms shall take affirmative action to insure that applicants are employed and that employees are treated during employment in a manner which provides equal employment opportunity and tends to eliminate inequality based upon race, national origin or sex.

Each prospective contractor shall submit to the City data showing current total employment by occupational category, sex and minority group. If, after verifying this data, the City concludes that it indicates total minority and female employment commensurate with their availability within the contractor’s labor recruitment area, i.e., the area from which the firm can reasonably be expected to recruit, the prospective contractor shall be accepted as having fulfilled affirmative action requirements for a period of one (1) year.

1.15 LIVING WAGE
All contractors proposing to do business with the City of Ann Arbor, except those specifically exempted by City Code, agree to comply with the living wage provisions of Chapter 23 of the Ann Arbor City Code and, if a “covered employer” as defined therein to pay those employees providing services to the City under this agreement a “living wage” as defined in Chapter 23 of the Ann Arbor City code; and, if requested by the City, provide documentation to verify compliance. (See excerpt of Chapter 23 of Ann Arbor City code attached to specimen contract)

1.16 INDEPENDENT COST DETERMINATION
1. By submission of a proposal, the submitter certifies, and in the case of joint proposal, each party thereto certifies as to its own organization, that in connection with this proposal:
a) They have arrived at the costs in the proposal independently, without consultation, communication, or agreement, for the purpose of restricting competition as to any matter relating to such fees with any other proposal submitter or with any competitor.
b) Unless otherwise required by law, the costs that have been quoted in the proposal have not been knowingly disclosed by the submitter and will not knowingly be disclosed by the submitter prior to award directly or indirectly to any other prospective submitter or to any competitor.
c) No attempt has been made or shall be made by the proposal submitter to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.

2. Each person signing the proposal certifies that she or he is the person in the proposal submitter’s organization responsible within that organization for the decision as to the fees being offered in the proposal and has not participated (and will not participate) in any action contrary to 1.a), b), or c) above.

3. A proposal will not be considered for award if the sense of the statement required in the Cost Analysis portion of the proposal has been altered so as to delete or modify 1.a), c), or 2 above. If 1.b) has been modified or deleted, the proposal will not be considered for award unless the submitter furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the Issuing Office determines that such disclosure was not made for the purpose of restricting competition.

1.17 RESERVATION OF RIGHTS
The City of Ann Arbor reserves the right to accept any proposal or alternative proposal in whole or in part, to reject any or all proposals or alternative proposals in whole or in part and to waive irregularity and/or informalities in any proposal and to make the award in any manner deemed in the best interest of the City.

1.18 TYPE OF AGREEMENT
The City intends to award a firm fixed-price agreement (inclusive of all related expenses) to a single responsible Respondent who will take full responsibility for all system components specified in this Agreement and ordered by the City. The City will have the option of adding or deleting quantities of equipment or services depending on final design and budget constraints.

1.19 CONDITIONS

1.19.1 Authorized Negotiator
The Respondent must delegate an authorized negotiator for the scope of services. This person shall be empowered to make binding commitments for the Respondent and its subcontractors.

1.19.2 Use of Subcontractors
The City acknowledges the challenge Respondents face in proposing an integrated strategy within a single response, and anticipates that Respondents will form groups or “teams” of vendors. Respondents must state their intention to use subcontractors in their proposals. No new or additional subcontractors will be accepted who are not identified in the proposal without the City’s written consent. A letter from the subcontractor confirming its role in this project must be included in a proposal appendix for all subcontractors listed.

1.19.3 Prime Contractor Responsibility
The Contractor shall cause all appropriate provisions of its contract with the City to be inserted in all ensuing subcontracts to ensure fulfillment of all contractual provisions by subcontractors. The City will consider the prime Contractor to be solely responsible in all contractual matters, including payment of any and all charges resulting from such subcontractor arrangements.

1.19.4 Certificate of Authority
The Contractor must maintain for the duration of the agreement with the City a Certificate of Authority to do business in the State of Michigan. And provide the City with a copy on request.
1.20 PROJECT SITE LOCATIONS
The Intranet Information Portal will be installed at the following location:

Guy C. Larcom Jr. Municipal Building
1st Floor, Information Technology Services
100 N. Fifth Avenue
Ann Arbor, MI

1.21 EXISTING CITY HARDWARE AND SOFTWARE
The City network has a Gigabit backbone with 100base-T fast Ethernet to workstations, using the TCP/IP network protocol. Respondents’ Proposals must be able to work within the framework of this architecture. In addition, the proposal must:
   a) Comply with current standards as specified in section 3.2, and
   b) Function using any connection type currently utilized by the City (including dial-up, IDDN, VPN and wireless).

1.22 PROPOSAL REQUIREMENTS
To be considered responsive to this RFP, a prospective Respondent must:

1 Have a minimum of (3) years experience in providing Portal systems similar in scope.

2 Provide customer references for which the prospective Respondent has provided a Portal system similar to the system specified by City, in accordance with section 2.2.1.6.

3 Certify that they have “integrator” capabilities.
2 PROPOSAL REQUIREMENTS

2.1 SUBMISSION OF PROPOSALS
The proposals are due on or before 2:00 p.m. on Friday, March 12, 2004 at the Purchasing Office, City of Ann Arbor, City Hall, 100 N. Fifth Avenue, Ann Arbor, Michigan. Proposals must arrive on or before the time and date specified. Proposals received after the deadline will be deemed unacceptable for further consideration. Regardless of the delivery method the Respondent is responsible for the actual delivery of the proposals to the City of Ann Arbor Purchasing Division office as of the deadline. You may hand deliver your proposals or use mail/courier services. All envelopes must be marked "INTRANET INFORMATION PORTAL" using the enclosed pink sticker. We cannot be responsible for any proposal not marked as stated above.

Deliver proposals to:

City of Ann Arbor
Purchasing Division, 3rd Floor City Hall
100 N. Fifth Ave. P.O. Box 8647
Ann Arbor, MI 48107
Telephone: (734) 994-2720
FAX: (734) 994-1795

2.1.1 PROPOSAL OPENING
Proposals will be opened only after the deadline. Respondents agree to honor their proposal for a period of 120 days from the proposal due date. All proposals become the property of the City of Ann Arbor after the deadline. The successful proposal and the subsequent agreement will become public information in accordance with the laws of the State of Michigan and in particular the Michigan Freedom of Information Act.

2.2 REQUIRED DOCUMENTATION AND FORMAT OF SAME
Contractor(s) shall submit an original and six (6) copies of its technical and cost proposals. The originals must be clearly marked “ORIGINAL.” The original and copies of both proposals must contain the name of the firm, the RFP number, and a title indicating “Technical Proposal” or “Cost Proposal.” All required addendum must be submitted with the original proposals.

Note: Only the successful Respondent is required to submit “Letters of Intent” for Performance and Labor and Material Bond prior to execution of the contract.

All proposal material submitted will automatically become the property of the City and will not be returned. After review of the proposals, the City reserves all rights, at its sole discretion, to use without limitation any and all information, concepts, and data contained therein.

2.2.1 Technical Proposal Format
The proposal shall have the following format:

Section Title
1 Executive Summary
2 System Description
3 Section-by-Section Response
4 Management and Implementation Plan
5 Professional Qualifications
6 Exceptions, Alternatives, and Options
7 Functional Requirements

2.2.1.1 Executive Summary
This section shall provide a management overview of the proposed stem. This is intended to be high level in nature and address such general items of interest as system scope, the scope of services, the risks associated with the effort, the hardware and software proposed, and other items that will allow the evaluation personnel to fully understand the proposal.
2.2.1.2 System Description
This section should be presented in as much detail as possible to describe the important features of the proposal in terms of meeting the overall and specific requirements. At a minimum, it shall contain the following:

- A complete description of the proposed approach to the City’s requirements.
- A detailed functional and technical description of the Respondent’s proposed system.
- A detailed list of proposed hardware and software.
- Product Literature.
- A detailed schematic diagram of the final software layout within the City’s facilities. This diagram will describe where new equipment is to be installed and where existing equipment is to be used or replaced.
- A discussion of the Respondent’s assessment of the major technical and/or management risk areas of the project.
- Optional Proposal Responses and alternatives.

The section should describe the proposed system and services in full detail and explain operational features and advantages. This section should also provide system drawings depicting system layout and configuration where applicable.

2.2.1.3 Section-by-Section Response
Respondents shall indicate compliance or non-compliance with all paragraphs in the RFP where equipment, a service, or an action is to be provided or performed by the Respondent. A statement of compliance shall include a detailed description of how the equipment, software, or service offered can technically meet the requirement.

2.2.1.4 Project Management and Implementation Plan
This section should detail the project management plan for providing and installing a system meeting the requirements of the RFP and describe the proposed installation plans and dates, training plan, testing dates and plans, and acceptance plans and procedures to be known as Deliverables. It shall be sufficiently detailed and identify progress milestones, i.e. when deliverables are to be furnished. The section should specify the proposed completion date for total system implementation.

2.2.1.5 Professional Qualifications
This section should provide brief experience summaries of all proposed key personnel, describing their related experience and their proposed roles for this project, including, at a minimum, the following:

- Chief Technical Officer
- Project Manager
- Other Employees Assigned to the Project
- Support Staff

The section should give a summary of the firm’s history, experience and qualifications, including years in business, locations, size, growth, annual sales, product evolution, and scope of product line, engineering staff, maintenance qualifications and financial stability. Include a copy of the current Annual Financial Report or sufficient information to allow the City to evaluate the firm’s capabilities based on its financial resources.

The section should provide an organizational chart showing the proposed project team, the approximate number of personnel assigned to each function and where they are located. Include sufficient discussion to enable the City to evaluate Respondent’s technical capabilities and resources for supporting the installation and system. If the Respondent intends to use any subcontractor as part of its proposed project team, the same information is required to be submitted by the Respondent in this section must also be submitted for each and every subcontractor.
The section should include the address of the firm’s office that will support the continued maintenance of the system under bid and the number of assigned staff and general skill types, if it is different from that listed above. Also include a description of the Respondent’s support policies in regards to staffing, response times, etc. If the Respondent will be using a designated outside vendor for any continued maintenance operations the same information is required to be submitted by the Respondent in this section must also be submitted for each and every subcontractor.

2.2.1.6 References
Respondents must supply the City with a list of all companies for which the Respondent has completed projects that are essentially equivalent to the Respondent’s proposal to the City. Any major difference between the Respondent’s proposal to the City and these companies must be noted. Respondents must also supply the City with an additional list of at least five (5) agencies that are current customers. These lists will include the following general information:

- Name
- Address
- Contact person knowledgeable of their system
- Contact phone number

If the Respondent intends to use any subcontractor as part of its proposed project team, the same information is required to be submitted by the Respondent in this section must also be submitted for each and every subcontractor.

2.2.1.7 Exceptions, Alternatives, and Options
Where deviations from the specifications may result in lower cost, greater hardware life expectancy and/or improved performance, Respondents are encouraged to describe, in writing, equipment that is in full agreement with the specification as well as a suggested alternate in sufficient detail to permit evaluation. For example, Respondents must explain why the alternate proposal will provide equivalent or improved performance. **Alternative proposals shall be labeled “Alternative A”, “Alternative B”, etc. Price submissions shall be labeled to match any alternative proposal submitted.**

2.2.1.7.1 Maintenance Agreement Option/Future Expansion Option:
Notwithstanding the above, Respondent should expect to provide the City with maintenance agreement and future expansion options as part of its proposal.

2.2.1.8 Functional Specification Requirements Response
Respondents are required to complete and submit a Functional Specification Requirements Response to the required specifications listed in Section 4. Respondent’s applications software will be evaluated based on the information in their response. The responses will be included, along with the rest of the proposal and the RFP, in the contract with the selected Respondent. Acceptance of the system will be contingent upon the Respondent delivering a system that includes all of the features promised by the Respondent.

2.3 Cost Proposal
This **separately packaged and sealed section** shall include a complete, itemized price breakdown for each task item in the Project. Alternative, optional items and modifications shall be priced separately and clearly identified as such. This information may be used to evaluate the overall scope of the project.

The Respondent is required to complete a detailed breakdown and summary of hardware, software and any related equipment necessary for proper installation of the proposed system.

**System Software**
Provide an itemized list and description of all system software for the proposed systems including release level information (version number and release date).

**Application Software**
Provide an itemized list and description of all application software being proposed for installation and state all operating systems or hardware assumptions not included with price package.
Training
Provide a description of the training to be provided, the allotted hours, and the assumed level of prior computer experience of attendees. Include a sample copy of any training manual or other education information that would be used with your proposal.

Services
Provide a full description of any other services to be performed that are not included in this subsection. Provide a full description of all warranties on hardware and software and any updates/release service for software included as part of the warranty period for the System as proposed and awarded. Provide a description of any extended warranty, software maintenance, upgrade/release service or other services available that are not included in the above categories. The City reserves the right to separately contract for any additional service identified.

2.3.1 Rates of Compensation
The Respondent will list the rates of compensation to be charged to the City (flat fee or hourly rate) for any additional services the City may request that are not included as part of the proposal. The services should include such items as custom programming, training, hardware installation and configuration, software installation, etc.

2.3.2 Sales Taxes
Under State law the City is exempt from the assessment of State Sales Tax on its direct purchases. Contractors who acquire materials, equipment, supplies, etc. for incorporation in City projects are not likewise exempt. State Law shall prevail. No extra payment will be allowed under the Contract for failure of the Contractor to make proper allowance for taxes it must pay.

2.4 RIGHT TO REJECT PROPOSALS
The City retains the right to reject any and all proposals, to waive any specifications and any informality or irregularity and to sit and act as the sole judge of the merit and qualifications of each product, service offered, or Contractor’s qualifications, including any subcontractors selected to perform the work.

Based on the request for a “turnkey Intranet Information Portal” system, the City reserves the right to reject any proposal that does not offer a complete solution.

Proposals are to be submitted on the forms provided in the RFP, where applicable. Failure to provide all information required in this RFP may result in your proposal being rejected as incomplete and non-responsive. All prices, terms, availability and any other conditions must be complete and in written form.

2.5 QUESTIONS
Any questions about the RFP shall be mailed or faxed by the due date shown in Project Schedule. No telephone inquiries will be taken. The questions and responses will be answered in writing and distributed as an Addendum to the RFP if appropriate. It is the Respondent’s responsibility to ensure that the question(s) have been received by the City’s contact for the project.

2.6 SYSTEM COMPLETENESS
These specifications may not necessarily list all equipment or components required to produce a fully operational system that will satisfy the City’s requirements. It shall be the responsibility of the Respondent to verify completeness of the component list and suitability of the units to meet the total requirements of the system. Any equipment or special installations required by the Respondent or by the performance specifications and not specifically mentioned herein, that was reasonably foreseeable, shall be provided by the successful Respondent without claim for additional payment. It shall be understood that the bid award will be comprehensive in nature leading to a completely operational system.

2.7 EQUIPMENT OFFERING
Respondents shall offer equipment that most nearly meets the specific details of these specifications. Any deviations must be stated in writing by the Respondent at the time of bid submission, and shall include an opinion as to why the deviation will render equivalent or better performance and reliability. If no deviations are noted, the City shall assume complete
conformance to these specifications and system requirements. The successful Respondent will be required to assume responsibility for all equipment in the bid.

2.8  BONDS
2.8.1  Performance Bond
On receipt of notice of award of the contract, the selected Respondent will be required to submit a “Letter of Intent” for the Performance Bond.

Concurrent with the execution of a contract for services, the Respondent will be required to post a performance bond. The amount of the bond will be equal to one hundred (100) percent of the contract price, for the benefit of the City of Ann Arbor. The bond must secure the Respondent’s performance from the date of contract execution until expiration of the warranty period. The surety company used shall be authorized to do business in the State of Michigan, holds a certificate of authority as acceptable surety for Federal bonds on Michigan projects, and be acceptable to the City Attorney. The required bond format is shown in Attachment “C”.

No work will be authorized or a down payment is made unless and until the City has received an executed contract and all required bonds and insurance documentation. If a proposal is accepted by the City and the selected Respondent fails to contract and furnish the required Bonds and insurance documentation within 15 calendar days after being notified of the acceptance of the proposal, then the Respondent shall be considered to have abandoned the Contract and the certified check or Bid Bond accompanying this Proposal shall become due and payable to the City.

2.8.2  Bid Bond
Each proposal shall be accompanied by a certified check, or Bid Bond by a recognized surety, in the amount of 5% of the total bid price. A proposal, once submitted, becomes the property of the City. In the sole discretion of the Administrative Services Director, the City reserves the right to allow a bidder to reclaim submitted documents provided the documents are requested and retrieved no later than 48 hours prior to the scheduled bid opening.

2.8.3  Bond Underwriting
All bonds furnished to the City must be underwritten by a surety company with a Best’s most recent insurance guide, “A-“ or better rating.

2.8.4  Bond Security
If any security and/or bond furnished in connection with this contract becomes unacceptable to the City or if any such surety fails to furnish reports as to financial conditions from time to time as requested by the City or if the contract price is increased to such an extent that the sum of any bond becomes inadequate in the opinion of the City, the Respondent shall promptly furnish such additional security as may be required from time to time to protect the interests of the City and of persons supplying labor or materials in the execution of the work to be completed by contract.

2.9  TECHNICAL PROPOSAL EVALUATION
All proposals received shall be evaluated with the emphasis placed on the Respondent’s ability to meet the City’s requirements, the responsiveness of the proposals, cost; and the criteria specified in the Technical Proposal Evaluation Criteria (Section 2.10).

Upon determination by the City, discussions may be held with one or more responsible Respondents for the purposes of clarification of their proposals. The City may make award based on initial proposals received, without discussion of such proposals. Accordingly, each proposal should be submitted on the Respondents most favorable terms from a price and technical standpoint.

The City also retains the right to combine various proposed items and/or alternates or to purchase separate items from any proposal when price and terms quoted are more favorable to the City unless Respondent specifies “all or nothing.”

Alterations must be explained or noted in the bid over the signature of the Respondent.
The City will evaluate all proposals through the use of a Selection Committee composed of City employees. The Selection Committee will initially evaluate responses to the RFP to decide which Respondent(s), if any, they will interview. For the initial evaluation, they will not consider the fee proposals. The fee proposal(s) of the highest rated Respondent(s) selected will be opened and reviewed before the interview(s). The selected Respondent(s) will have the opportunity to discuss in more detail their qualifications, their experience and fee proposal during the interview process.

2.10 TECHNICAL PROPOSAL EVALUATION CRITERIA
The award of this Project will be based on several criteria. The evaluation criteria and the maximum point values are described below. While oral presentations may be requested, if there is a question as to the most responsive firm, the award may be made without oral presentation based on proposals as received. The Proposal Review Committee may schedule interviews/oral presentation with the top two (2) or three (3) firms after rating for fee proposals is added to the comprehensive evaluation score. The City reserves the right to schedule interviews/oral presentations of additional firms.

2.10.1 Quality of Proposal – 15 Points
The quality of the proposal submitted by a Respondent is viewed as a basic indication of the Respondent’s general capability and technical competence. Quality will be interpreted as completeness, thoroughness, accuracy, compliance with proposal instructions, and the organization and conciseness of any submitted descriptive material.

2.10.2 Strength of Technology Solution Proposed – 20 Points
The Proposal Review Committee will base technical viability primarily on responses to Section 4 of this RFP.

2.10.3 Professional Qualifications – 15 Points
Professional qualifications will be judged on experience, financial stability, ethical history, and the employees to be assigned to the project. Proposed subcontractors will also be evaluated as part of this component.

2.10.4 Experience with Similar Projects – 15 Points
The experience of the Respondent and its employees, and identified subcontractors (if any) with projects that are essentially identical to the one being undertaken is highly desired.

2.10.5 Management and Implementation Plan – 20 Points
The management and implementation plan is required to be clear, concise, and complete. There will be a heavy emphasis placed on the Respondent’s demonstrated knowledge of the City’s facilities and the detail of the hardware schematic diagram.

2.10.6 Cost Proposal – 15 Points
Cost proposal (original plus six (6) copies) must be submitted in a separate sealed envelope with your proposal. Pricing for alternates, options, etc. may be listed but must be clearly marked as such and included with the cost proposal submitted.

2.11 COST PROPOSAL EVALUATION
The City reserves the right to accept other than the low bid if evaluation determines that to be in its best interest. Proposals whose costs do not accurately represent a reasonable cost for the system being purchased may be rejected.

Cost Proposals will be evaluated in relation to technical merit. The City will seek to enter into a contract with the Respondent with the highest technical merit and most favorable price. If differences cannot be resolved, the City may open negotiations with the Respondent with the next highest technical merit.

Cost Proposals for any additional services noted in the Proposal (i.e., extended warranty) and acceptable to the City will be handled by a separate agreement.
2.12 PRESENTATIONS / SITE VISITS / DEMONSTRATIONS

Selected Respondents may be asked to provide:

- Presentations of their proposals to the evaluation committee.
- Site visits by City representatives to locations where similar systems have been installed.
- Demonstrations of proposed systems.

All costs incurred by the Respondents in making such presentations or demonstrations will be borne by the Respondent. The Respondent will be responsible for coordinating visits with the Contract Administrator (see section 1.6 above). Following any such presentation, visit, or demonstration, proposals may be re-evaluated.
3  SCOPE OF SERVICES

This section details the tasks that are to be performed (deliverables) as part of the delivery of the Intranet Information Portal system. This section has three parts:

- Section 3.1 provides background about events and decisions leading up to the release of this RFP, and the overall strategy and vision for the City’s use of portal technology.
- Section 3.2 provides information about the City’s current technology architecture, including standards, client/server environments, and the network layer.
- Section 3.3 outlines the scope of work for this contract. Respondents will concentrate on this section in designing their solution. Details about the specific format and content of proposals, however, are located in Section 2.

3.1  GENERAL INFORMATION

City’s use of Intranet technologies

The City of Ann Arbor has had web servers deployed for Intranet use since approximately 1998. The City has not been successful to date in creating an Intranet "web presence" or containing environment for the variety of web applications and pages that have been generated. Despite this, the City has been developing and purchasing browser-based applications, and distributing URL's to the applications for lack of an enterprise website. Due to mounting demand from within the organization, and with the backing of City Administration, ITSD has been given budgetary approval to coordinate the design and deployment of a unified, organized, and highly function-oriented Intranet site.

Current Intranet use includes:
- Financial reports
- Info Advantage report presentation (3rd party web-based report generator – based on Business Objects)
- Payroll reports
- Ricoh e-cabinet document management system
- Human Resource Department Affirmative Action and Living Wage vendor compliance database lookups
- Microsoft Sharepoint implementations (City Council/Departments)
- Excel pivot tables
- Archive data lookups (utility billing, parking tickets, other)

Anticipated Intranet use includes:
- Report repository
- Microsoft Project Central
- Office 2000 web publishing, including Microsoft Data Access pages
- Enhanced/expanded Sharepoint use (subscription, etc)
- Future browser-based applications (CRM, GIS, other)

University of Michigan study

In January of 2003 the City hired two Masters students from the University of Michigan School of Information to perform intranet-related research (internal and external) and analysis and provide a final report outlining their findings and providing implementation recommendations (preliminary functional website design). The final report will be provided with this RFP. Following is the brief executive summary from their study:

Executive Summary

Our study of the technology needs of the Ann Arbor City employees found that an Intranet is no longer an option; it is an expected tool to many of the employees. Extensive interviews with key City stakeholders, as well as an electronic survey were conducted. In addition, we interviewed key participants in a recent intranet development project carried out by Washtenaw County. This research revealed several key issues that must be addressed when designing such a system.

- As many forms as possible should be available in electronic form. Ideally these would be able to be filled out and submitted electronically, but even providing forms for printing from a central web-based resource would be beneficial.
- Some method for tracking contracts through the approval process was desired, as well as improved reporting (especially financial reports), and purchasing management.
- The intranet should also provide a central repository for City policies and organizational diagrams, to serve as a point of reference for City employees.
While City employees generally reported satisfaction with IT support, they expressed a need for improved training for new applications (including those that might be included in an intranet).

Expansion of the City GIS system to allow improved map viewing through a web interface is desired by several departments.

By addressing these issues, and learning from the experience of Washtenaw County, the City of Ann Arbor can produce a useful and cost-effective intranet. However, in order for this to occur, adequate resources must be allocated and sufficient education and marketing must be conducted to ensure successful adoption.

**Vision/mission/strategy**

The City of Ann Arbor is pursuing the implementation of Intranet Information Portal technology, which will support its Enterprise Information Portal (EIP) needs for employees, elected officials, and citizens. The City of Ann Arbor is requesting a proposal from selected vendors to provide a fully integrated, turnkey solution to meet its current and projected EIP requirements. The EIP system is defined to include a wide variety of digital assets and information categories including, but not limited to:

1. Unstructured content (documents, hypertext content, etc.)
2. Structured content (data stored in relational or other types of databases)
3. Geospatial content (Geographic Information Systems and digital cartographic mapping, etc.)
4. News (either free or for-fee)
5. Groupware application data (e.g., Microsoft Exchange)

The solution must go beyond the mere concept of “MyYahoo” by providing for the delivery of relevant, timely content and being an effective knowledge management (KM) tool in a way that's palatable to the knowledge worker, all through a unified, common, and secure user interface.

The EIP solution must be the place where employees do their work, and because it uses the popular browser-based interface, workers are more likely to contribute to the knowledge base as part of their daily routine. Contribution has often been the missing piece in KM systems because knowledge sharing is often perceived as an extra step that takes up valuable time. An effective portal makes knowledge sharing easier and spreads KM throughout the organization.

It is the City’s intent that an EIP become "enabling technology", bringing content and applications together into a unified, common, and secure user interface. Departments should be able to leverage the high speed and security of an Intranet to create efficiencies in communication and productivity that are yet to be imagined. A major challenge will be to create an Intranet flexible enough to allow Departments to freely explore/exploit web technology (such as Microsoft’s Sharepoint), yet rigorous enough to ensure that ITSD can securely host web applications.

After some consulting of outside sources and Gartner research, it was observed that there is a wide spectrum of "portal" software products ranging from the tightly integrated, packaged solutions, to more open, component-based development platforms. Generally speaking, the development platforms offer less “out-of-the-box” functionality than the packaged solutions, but do provide a higher degree of scalability.

Due to the accelerated timeframe for this project it was determined that the investigation would be focused on readily available “packaged” solutions, paying particular attention as to how those products address scalability issues.

ITS is committed to consolidating our many Intranet sites with an “out-of-the-box” EIP solution and enhancing our technology systems to improve customer service, operational efficiency, and information analysis for decision making.

EIP technology is the key to improving organizational performance and will shape the manner in which the City of Ann Arbor conducts business and deliver service to our employees and constituents. In fiscal year 2005-2006, ITS will be extending EIP technology to our citizenry via an internet portal for government-to-customer transactions and an extranet portal for government-to-business transactions.
3.2 TECHNOLOGY OVERVIEW
This section is intended to educate respondents as to the existing technology environment at the City of Ann Arbor, and the existing technology standards. It is provided to assist the respondent in preparing and prioritizing its recommended deployment approach.

Systems overview
The City network has a Gigabit backbone with 100base-T fast Ethernet to workstations, using the TCP/IP network protocol. Internal wide area connections vary from ISDN to fiber.

The City has a T1 connection to the Internet with plans to increase to a 6MB fiber connection within the next six months.

The client software shall be true 32-bit software running on the MS Windows NT 4.0 or MS Windows 2000 or MS Windows XP operating system.

City web servers run Internet Information Server (IIS) version 5.x and above.

The City has implemented Microsoft’s Active Directory directory service.

Current internal load
The following table lists Intranet applications currently in use, and the estimated level of use:

<table>
<thead>
<tr>
<th>Application</th>
<th>Estimated Number of Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial reports</td>
<td>60</td>
</tr>
<tr>
<td>Info Advantage report presentation (3rd party web-based report generator – based on Business Objects)</td>
<td>60</td>
</tr>
<tr>
<td>Payroll reports</td>
<td>40</td>
</tr>
<tr>
<td>Ricoh e-cabinet document management system</td>
<td>25</td>
</tr>
<tr>
<td>Human Resource Department Affirmative Action and Living Wage vendor compliance database lookups</td>
<td>40</td>
</tr>
<tr>
<td>Microsoft Sharepoint implementations (City Council/ Departments)</td>
<td>50</td>
</tr>
<tr>
<td>Excel pivot tables</td>
<td>5</td>
</tr>
<tr>
<td>Archive data lookups (utility billing, parking tickets, other)</td>
<td>25</td>
</tr>
</tbody>
</table>

Current standards
- The current standard is web browser is Internet Explorer version 5.x or greater.
- If a database management system is required, it shall be MS SQL Server 2000 or Oracle 8i on AIX 4.3.3.
- Proposed solutions should be compatible with JAVA or VB Scripting environments.

3.3 SCOPE OF WORK
The City of Ann Arbor is soliciting proposals from qualified suppliers for the development and implementation of an Intranet Information Portal based on the use of Enterprise Information Portal technology.

The City is requesting that Respondents submit proposals outlining MULTIPLE SOLUTIONS. Solutions will detail increasingly greater VENDOR PARTICIPATION, for example:

<table>
<thead>
<tr>
<th>Level of Participation</th>
<th>Scope of Work (EXAMPLE ONLY)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimal</td>
<td>As described in section 3.3</td>
</tr>
<tr>
<td>Increased</td>
<td>As described in section 3.3 PLUS integration of one or more current City Applications</td>
</tr>
<tr>
<td>Maximal</td>
<td>As described in section 3.3 PLUS integration of ALL currently existing City web Applications, as well as all administrator and end-user training provided on-site.</td>
</tr>
</tbody>
</table>

It should be understood that, due to the flexibility in proposed solutions just described, the scope of work described below in sections 3.3.2, 3.3.3 and 3.3.4 is considered a MINIMUM LEVEL OF ENGAGEMENT for the selected Vendor.

Additionally, Respondents should provide SEPARATE PRICING SCENARIOS for each hosting solution proposed (vendor, City, third party, etc.). Alternative solutions should be submitted as described in Section 2.2.1.7.
3.3.1 Project Administration

The Vendor shall submit a Project Implementation Plan within ten (10) business days of execution of the contract. The Plan shall consist of the following:

i. **Work Breakdown Structure** - A hierarchical chart showing the top-down relationship of all tasks and activities, including City of Ann Arbor staff required for completion of specific tasks;

ii. **Summary Project Control Chart** - A chart showing all tasks, the critical path and all task dependencies;

iii. **Milestone Chart** - A list of milestones with completion dates;

iv. **Work Plan** - An organized list of specific tasks, including responsibility for each task, level of effort in terms of people-hours, and beginning and ending dates. Be sure to include City of Ann Arbor staff required for completion of specific tasks. **Should include installation, testing and acceptance plans and dates (see Section 2.2.1.4).**

v. **Training Plan** - Include target audiences, proposed course outlines, training venues, schedule for training, instructional materials to be provided by the Vendor, documentation, and a listing of all other equipment needed to implement training.

The selected Vendor shall provide the City with a copy of the work plan in Microsoft Project format.

**System Testing**

The Vendor shall:

1. Submit a Test Plan to the City for approval no later than ten (10) business days after contract award.

2. Develop a Test Matrix including transactions, conditions, and desired results no later than ten (10) business days after City approval of the Test Plan.

3. In conjunction with City staff, conduct a full System Test involving all aspects of the System.

4. Document and submit results from the final System Test to the City for approval.

The Vendor shall make all adjustments and modifications to the System at its own cost and expense so that the System will successfully perform in accordance with the System Reliability Test.

The test schedules shall be conducted at mutually agreed dates and times between the City and the Vendor.

**System Reliability Test**

The System Reliability Test period shall begin no later than two (2) business days after the System is ready for City use. The System Reliability Test shall be considered successful when the System has been operable for a period of fourteen (14) calendar days, during which no less than ninety-nine percent (99%) of System has been functioning at an acceptable level of performance.

**Acceptance Test**

The Respondent shall provide a detailed acceptance testing plan of the complete Intranet Information Portal with their response to this RFP for approval by the City. The Acceptance Testing Plan shall be set forth in a written document and shall define in detail the manner of testing the system (hardware and software) for its compliance with the functional requirements stated within the RFP. On approval by City, the Acceptance Testing Plan shall become the basis for acceptance of the functional performance of the systems in the contract for services and may be used as a performance indicator for payment purposes. In the event the City requires a modification to the Acceptance Testing Plan during the contract term but before final approval, the Selected Respondent shall respond to the City’s request for the change within seven (7) calendar days.
3.3.2 System Installation

NOTE: It is expected that all work performed specific to System Installation is subject to verification/testing and will be done in conjunction with City technical staff.

The Vendor shall:
1) Install necessary hardware and software at the City sites and initialize the System.
2) Perform tests on the installed system components.
3) Develop training for both administrators and users. Training is expected to include security configuration, user administration, and daily operations, and cover such items as preventative maintenance, troubleshooting and routine maintenance.
4) Documentation for the training and operation of the system shall be provided at no additional cost, including operating manuals and online help. The City shall be granted the right to reproduce the training materials for its own use.
5) Develop a test system designed to aid in the training of various personnel throughout the implementation and operations phase of the project. This system shall be separate from, but parallel to, the operational version of the System to facilitate hands-on training and quality control testing without the possibility of inadvertently affecting the actual production system.
6) Train specified City personnel in the use of the system for specific job functions. Such job functions are envisioned to be operationally oriented, and will be mutually agreed upon by Vendor and City during Implementation Phase.
7) Start up and monitor (during implementation phase) the entire System, taking immediate corrective action on areas that are not operating in accordance with the requirements contained herein.
8) Instruct City system administrators on system management capabilities and reports to aid in monitoring system performance.

3.3.3 System Security

NOTE: It is expected that all work performed specific to System Security is subject to verification/testing and will be done in conjunction with City technical staff.

The System shall possess security features which limit System access to authorized personnel, thereby addressing the need for multi-tiered, multi-level security. The Vendor shall:

1) Establish initial system-level security (hardware, operating system and network layer) and train City personnel in the administration of such security.
2) Assist in determining appropriate levels of User security, and train City personnel in the administration of such security.
3) Describe in detail the full functionality of security available with Vendor solution in regard to maintaining strict control of the privacy, integrity, and safety of all data stored or processed using the Vendor solution.

3.3.4 System Implementation

NOTE: It is expected that all work performed specific to System Implementation is subject to verification/testing and will be done in conjunction with City technical staff.

A more comprehensive proposal in which the selected Vendor has a greater level of participation (see introduction to Section 3, and Section 2.2.1.7) would include greater participation from Vendor in regard to System Implementation. Such participation should include, but by no means should be limited to, the following:

1) Integration with City’s User Directory Service.
2) Integration and testing of one (1) specific (to be determined) Active Server Page (Microsoft Server-side scripted) City application. Final acceptance of such a solution would include appropriate use of pass-through security.
3) Integration and testing of third-party American Management Systems Info Advantage web-based reporting system (read-only). Final acceptance of such a solution would include appropriate use of pass-through security.
3.3.5 Training
In addition to the installation/implementation training mentioned above, Respondents shall describe the means by which appropriate City staff can gain access to training specific to the following:

1) Integration of third-party web applications and Portlets.
2) Development of Portlets, or modification of internally-written web applications to run as Portlets.
3) End-user training.
4 REQUIREMENTS QUESTIONNAIRE

Through this section Respondents will provide both overview and technical details of the proposed solution, as well as Respondent’s experience in installing, configuring and supporting the type of system being proposed.

The vendor will be expected to provide a complete solution to City of Ann Arbor, which substantially meets or exceeds the requirements outlined in this section of the RFP. In addition, as specified in Section 3, the vendor will be required to provide ancillary and support system recommendations, implementation, conversion assistance, training, and ongoing support. A thorough evaluation will be conducted to determine the solutions that will best meet City of Ann Arbor’s requirements. Your response to the following questions in the areas of software functions and features, vendor support and training, and associated fees will be instrumental in our decision process.

Additionally, vendors are encouraged to indicate their ability to furnish other integrated software modules and services which provide functionality to support City of Ann Arbor entire EIP and operational requirements even though such information is not required in the response to this RFP.

Executive Summary
1. Please provide an executive summary of your solution.

Company Background
2. Please provide an overview of your company’s history, including major solutions and market activity.
3. What was your company founded to do? What is your company’s strategy?
4. Is portal technology your company’s core business? What percentage of your company’s revenues is derived from portal-related software sales?
5. Describe recent mergers and acquisition, as well as strategic business partnerships.
6. Please describe your company’s financial performance over the last two years.
7. What are the competing solutions or services in your market segment?

Enterprise Web Background
Enterprise Web Suite Overview
8. What is the name and version number of the portal solution you are proposing? What other products and solutions are included in your Enterprise Web solution?
9. Do the products that comprise your Enterprise Web solution work together? For example, do they share one security model, a single search index, a single administrative console, a single UI for users to learn, and a single set of style sheets to edit?
10. How many customers are using this version of the portal as an Enterprise Web platform

Development Processes
11. How often does your organization develop major product releases?
12. Do you have a defined beta program for future releases of your solution? If so, do customers participate?
13. Does your company have a defined process for gathering customer feedback on requested solution features, enhancements or requirements for future versions of the solution?
14. Do you use any standard Web usability testing to develop your solution UI?

Enterprise Web Architecture
Scalability & Fault Tolerance
15. How many users does a standard configuration support?

Oracle Portal uses Oracle Internet Directory server, built on the oracle database to store user information. Hence there is no restriction on the number of users or data that can be supported.

16. How does your portal integrate large numbers of remote Web services?

Oracle Portal has omni portlet, using which remote webserices can be integrated with portal

For more information refer:
17. How robust is the portal’s runtime integration environment in terms of high performance, reliability, and scalability? Has your portal been benchmarked and scale-tested by an independent lab?

Oracle portal is highly available, scalable and robust. Public benchmarks are published periodically on the Oracle web site (http://www.oracle.com). In addition, benchmarking is performed by independent agencies such as TheServerside.com (http://www.theserverside.com), SUSE (http://www.suse.com), IDC (http://www.idc.com) and Gartner (http://www.gartner.com).


18. Has an independent source verified your portal’s ability to rapidly retrieve and integrate large numbers of remotely-hosted Web services?

19. erant, so that if a Web server fails, users experience no interruption in service?

Yes. The system is fault-tolerant so that user experiences no interruption of service.

OracleAS Portal, a component of the Oracle Application Server 10g (9.0.4) introduce a rich set of features to ensure end-to-end high availability of mission critical applications. It includes advanced clustering features to keep critical applications up and running 24x7 on low-cost commodity hardware. It offers Zero Unplanned Downtime and Zero Planned Downtime through the Fast Start Fault Recovery Architecture: in case an instance goes down, you can recover more quickly and gracefully. Oracle Application Server's high availability infrastructure includes OracleAS Web Cache clusters, Oracle HTTP Server (Apache), and OracleAS Containers for J2EE. In addition, OracleAS Infrastructure can take advantage of Hardware clustering techniques to make it highly available.

For more information please refer http://otn.oracle.com/products/ias/hi_av/index.html

20. Does offering new tools or services within the portal entail installing new software on each portal client, such as a browser? Does the portal require client-side controls in Java or ActiveX? If some of my users will not support client-side controls, what functionality will they lose?

Oracle Application Server (OracleAS) Portal is a web based thin client application. So new tools or services within the portal are deployed/installed on the server side. There is no need for client to install new software. Portal does not require client-side controls in Java or ActiveX. However, it depends on custom applications integrated in to Oracle Portal.

21. How has the solution been optimized for users operating in bandwidth-deprived geographies?

Platform Support

22. Provide a diagram of the system architecture.

Oracle Application Server (OracleAS) provides a scalable architecture for dynamically generating customized pages that can meet the performance requirements of any sized Portal including departmental, regional, enterprise-wide and Internet deployments.

The system architecture is as illustrated below:
OracleAS Portal is a component of the Oracle Application Server (OracleAS). Following screen-shot shows Architecture the Application Server 10g.

23. Which relational databases does the system support?

Oracle Application Server (OracleAS) Portal (which is a component of the OracleAS) works with Oracle Database. Oracle Database is a highly efficient, reliable, secure and cost effective relational database and works as a backend database for the OracleAS.

Oracle Database is required for the Portal Repository only. Other applications can continue to use the Oracle Database or other databases and still be accessed through Portal.

24. Which application servers does the portal server support?
Oracle Application Server (OracleAS) Portal is an integral component of the OracleAS. Oracle Application Server 10g is an integrated, standards-based software platform that allows organizations of all sizes to be more responsive to changing business requirements. It provides all the middleware services needed to deploy and manage applications and Web services, deliver personalized applications through enterprise portals and mobile devices, provide real-time business intelligence, integrate applications, and automate business processes. OracleAS Portal is integrated with other components of the Oracle Application Server and with the Oracle database; hence applications build on it can scale to an enterprise class audience.

For more information about Oracle Application Server 10g please refer: http://otn.oracle.com/products/ias/index.html

25. Which browsers does the solution support?

Oracle Application Server (OracleAS) Portal is supported by standard web browsers (like IE and Netscape) and wireless clients.

Portal's support of wireless client's:

OracleAS Portal works in conjunction with OracleAS Wireless option to automatically transform the portal page structure to a form appropriate for the smaller screen devices common for wireless clients, displaying any portlets that support a rendering mode that uses Oracle's MobileXML content type. MobileXML is a markup language that hides the differences in markup syntax used by differing wireless clients. Portal's built-in database provider components will automatically generate MobileXML in response to mobile requests.

26. Which operating systems does the solution support?

Oracle Application Server (OracleAS) Portal is available on the following operating systems:
Microsoft Windows Server 2003
Microsoft Windows 2000
Microsoft Windows 98
Microsoft Windows NT for Intel
Microsoft Windows XP
HP Tru64 UNIX
HP-UX PA-RISC
IBM AIX -Based Systems
Infrastructure Tier
Linux x86
Solaris Operating System (SPARC)

27. How does the solution store application data, such as user profiles, directory structure and document links? What platform does the solution use to store text and metadata-indexes?

Oracle Application Server (OracleAS) Portal uses OracleAS Oracle Internet Directory (OID) as the user repository to store user and group definitions. Users can be provisioned through user management screens in OracleAS Portal, or with the administration tools and APIs provided with OID. Oracle Internet Directory is a standards-based LDAPv3 directory that leverages the scalability, high availability and security features of the Oracle Database.

For additional information on Oracle Internet Directory, please refer http://otn.oracle.com/products/oid/index.html

28. What platform hosts the portal’s embedded applications and services, such as portlets?

Oracle Application Server (OracleAS) Portal is a component of the OracleAS. Oracle Application Server 10g is an integrated, standards-based software platform that allows organizations of all sizes to be more responsive to changing business requirements. It provides all the middleware services you need to deploy and manage applications and Web services, deliver personalized applications through enterprise portals and mobile devices, provide real-time business intelligence, integrate applications, and automate business processes.

For more information on Oracle Application Server, please refer this link. http://otn.oracle.com/products/ias/index.html

29. What sort of wireless or disconnected devices can your solution support (PDA, cell phone, pager, etc.)?

OracleAS Portal works in conjunction with OracleAS Wireless option to automatically transform the portal page structure to a form appropriate for the smaller screen devices common for wireless clients, displaying any portlets
that support a rendering mode that uses Oracle's MobileXML content type. MobileXML is a markup language that hides the differences in markup syntax used by differing wireless clients. Portal's built-in database provider components will automatically generate MobileXML in response to mobile requests.

To explain more about this we have a reference customer called Venison Wireless.

Venison Wireless is the United States’ leading wireless communications provider, servicing 96 out of the top 100 United States markets. The company serves 29 million subscribers or 25% of the wireless phone market. In an effort to increase sales personal productivity and expand its wireless data capabilities, Venison Wireless went live with Corporate Link, a suite of mobile applications that run on Oracle10iAS Wireless. Logging onto Corporate Link via phone, personal digital assistant (PDA) or other wireless devices provides the company sales force and senior executives with 24/7 access to e-mail, productivity, sales and CRM applications.

Using OracleAS Wireless allows the company to automatically alert sales people of urgent incoming e-mails or contacts from key individuals, via their wireless device. "The response has been very positive. If you're on the road, talking to customers you need the most current information at the touch of a button. You do not always have the luxury of booting up your laptop. Additionally, you can personalize your mobile suite to be proactively alerted via an SMS message when critical information is available or updated" says Tom Madsen, Executive Director of Wireless Data Solutions at Verizon Wireless. Having access to sales information on the road increases the sales force’s productivity.

30. Is the solution compliant with Section 508 of the Rehabilitation Act?

Tools and Configuration

31. Describe the solution’s set of analysis tools. Can the system generate administrative reports describing usage levels? Does the system provide auditing information? How are the audit trails queried?

Oracle Application Server (OracleAS) Portal provides Monitoring and logging features to portal administrator that enable the portal administrator to easily analyze and better understand the type and volume of activities that are taking place within the portal installation. Five built-in portlets are configured for this purpose. These portlets provide access to a series of reports and charts that summarize various activities within the portal. They summarize activities by objects, by events, by date and time of day and help answer many of the frequently asked questions. This includes the most popular pages, most frequently added pages, most often hidden pages, most frequent content area contributors, most popular folders, most popular content area searches, content area searches that have returned the most hits, content area searches that failed to find any results, deleted objects etc.

<table>
<thead>
<tr>
<th>Domain</th>
<th>Object Type</th>
<th>User</th>
<th>Event</th>
<th>Name</th>
<th>Date</th>
<th>Elapsed Time (seconds)</th>
<th>Row Count</th>
<th>Browser</th>
<th>Language</th>
<th>Browser</th>
<th>IP Addr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content Area</td>
<td>Item</td>
<td>PORTAL30</td>
<td>Edit</td>
<td>Oracle 9i IAS Information</td>
<td>31-OCT-01</td>
<td>0</td>
<td>1</td>
<td>en</td>
<td>Mozilla4 75 [en] (Win95, 1)</td>
<td>144 22</td>
<td></td>
</tr>
<tr>
<td>Content Area</td>
<td>Item</td>
<td>PORTAL30</td>
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<td>Services</td>
<td>24-OCT-01</td>
<td>0</td>
<td>1</td>
<td>en</td>
<td>Mozilla4 0 (compatible, MSIE 5.5; Windows NT 5.0)</td>
<td>144 22</td>
<td></td>
</tr>
<tr>
<td>Content Area</td>
<td>Item</td>
<td>PORTAL30</td>
<td>Edit</td>
<td>Services</td>
<td>24-OCT-01</td>
<td>0</td>
<td>1</td>
<td>en</td>
<td>Mozilla4 0 (compatible, MSIE 5.5; Windows NT 5.0)</td>
<td>144 22</td>
<td></td>
</tr>
</tbody>
</table>

Sample of Out-of-Box Audit Report

OracleAS Portal has facility to log objects and actions in Oracle Portal and generate reports for analyzing the data. For example, we can add an entry into the Activity Log every time Oracle Portal users create, edit, view or delete a particular page.
The above figure shows two logging requests. The first creates an entry in the Activity Log every time a page is created. The second creates an entry every time a portlet is customized. If you want to log all possible requests, choose % for each field.

We can choose the objects (sub domains) from the list below that you wish to log objects.

Pages - Create, Edit, View, Delete
Categories - View
Perspectives - View
Items - Create, Edit, View, Delete, Move, Check Out, Check In
Documents - Create, Edit, View, Remove
Components - Create, Edit, View, Delete
Users - Create, Edit, Delete
Groups - Create Group, Delete Group, Add User to Group, Delete User from Group
Portlets - Add to Page, Delete from Page
Portlet Instances - Hide, Show, Customize
Searches – Perform

In addition to the above reports and audits, audit trails can also be queried.

32. How do administrators add new services to the Enterprise Web while the portal is online?

Administrators can add new services to the enterprise Portal while the system is online by deploying them as enterprise applications or adding them as external applications in the Portal environment.

33. Can users or administrators configure their own profiles, or are these profiles created through Web programming?

Yes. Administrators can configure their profiles and create users. If other portal users are given administrative privileges, those users can configure their profiles or others profiles and perform other administrative tasks.

OracleAS Portal supports the definition of Users & Groups within the Oracle login Server. This means creating the appropriate directory definitions within the Oracle Internet directory. The user profiles can be configured either by Portal environment or the Oracle Internet directory. Oracle Internet Directory’s Delegated Administration Service is a self-service application that can be used to configure user profiles.

Also, the Oracle9iAS Portal PDK provides full API for the automated creation of accounts and the security profile associated with that user. Whereas, by default, user definition is via Login Server Admin screens (and with Portal 9.0.2 OID screens). Hence users can use these APIs to create their own registration screens/Portlets.
34. Is there a framework for securing embedded tools and services, such that only specified classes of users may access specified tools and services?

Yes. Portal administrator can grant necessary permissions so that only specified users or group can access a particular service. Various type of permission can be given to these types of users like view, manage, manage content, manage style etc.

The following screen-shot shows the various type of access rights that can be set.

35. Is the Web application open source? If not, how can customers and third parties modify the behavior of the Web application? Are both Java and .NET user interfaces supported?

Oracle Application Server (OracleAS) Portal is not open source. However, OracleAS Portal functionality can be extended by OracleAS Portal Development Kit (PDK) framework. Using the PDK one can create portlets either as PL/SQL Stored Procedures (Database Providers) or in any other web language including Java, Web Services, XML, ASP, Perl etc.

36. In terms of support for open industry standards please provide a list of all industry standards you support in your proposed solution. If a standard is not currently supported, indicate how the function is implemented and the “Availability Date” if you expect the products to support it.

Oracle 9iAS Portal consistently integrates with industry standards such as SAX based XML, Electronic Business Extensible Markup Language (ebXML), LDAP; IMAP4; POP3; Email Server 5.2; SMTP compliant MTA; SMS; Workflow 2.6 (via AQ); Open Gateways 8.1.6; SOAP 1.1; Apache 1.3.19; mod_fastCGI; mod_mm; Hi_Av; Java Servlets 2.2 and 2.3; JSP 1.1; JESI tags (Akamai); EJB 1.1 and 2.0; Java Transaction API; IDNÍ 1.2; JMS 1.0.1; JavaMail 1.2; Oracle Forms Servlet; BiDi languages; Web Cache SSL; ESI; OAI 4.0 for workflow, OEM, AQ and iStudio predefined transformations.

Some example where the above-mentioned standards are used:
1) To Managing users and groups - Oracle Internet Directory (OID) is Oracle9iAS Portal's repository for user and group definitions. Third party LDAP directories can be synchronized with OID using built-in metadirectory capabilities.

2) Web service: Oracle Portal solution supports complex Web Services defined by a set of standards referred to under the umbrella of Electronic Business Extensible Markup Language (ebXML). While SOAP, WSDL, and UDDI enable simple request-reply style Web Services, ebXML encompasses a broader set of standards that are designed to facilitate collaboration among multiple trading partners, having multi-party, long-running transactions (or business “conversations”) that involve sophisticated security (such as non-repudiation and digital signatures), and business process management.

37. Does the solution use style sheets and include files to simplify design changes?
The product includes support for style sheets and includes files for design changes. The changes made in (Graphic User Interface) GUI based style sheets are reflected on the web application.

The following screen-shot shows how easily color can be changed to various elements (like Items, Tabs, Portlets) in the Portal.

38. In what language is the solution’s user interface written? Describe how I can customize the solution’s user interface.

Oracle Portal user interface is in industry standard J2EE. Oracle Portal provides very easy and convenient way to customize Portal page. After a creating a portlet definition with a default display, a page designer can customize that definition to meet the needs of a particular community.

The following screen-shot shows how easily any type of style can be applied to various elements of a portal. It is also possible to create new style as per requirement.
The following screen-shot shows “Layout” mode of a portal page where any number of portlets can be added and arranged in a page.

39. Please describe the procedures necessary for backing up and restoring to the system (including ability to do partial restores).

Oracle Portal provides a set of export/import utilities that enable customers to backing up the applications built on the Portal. A typical example where these utilities would be used is to copy or update portal page groups and application components between a development instance and a production instance of Oracle Portal. In oracleAS Portal 10 release individual pages and other objects can be exported, without having to export an entire Page Group.

Export/Import functionality is provided via the portal user interface along with a set of command-line scripts that are used to create export/import dump files. Depending upon the operating system in which your portal installation resides, the export scripts can be generated as UNIX shell scripts or DOS command files.

The export process consists of the following steps, each performed in sequence:

- Designation of content/pages/applications to export from Portal Navigator or search results using bulk actions.
- Generation of the export/import script from the Transport Set Manager.
- Execution of export/import script (with -mode=export) to create an export dump (.dmp) file
- File transfer of script and dump file to target machine for import.
- Import from dump file by executing export/import script with "-mode import".
- Resolution and merge via import manager

Please refer this link for detailed Frequently Asked Questions (FAQ) for Portal 9.0.2.2/9.0.2.3 Export/Import.
http://portalstudio.oracle.com/pls/ops/docs/FOLDER/COMMUNITY/OTN_CONTENT/MANIPAGE/DEPLOY_PERFORM/EXPORT_IMPORT_FAQ_0305.HTM

40. Does your Enterprise Web solution support the migration of configurations from a development system to a staging system to a production system? Describe the workflow for this.

Yes. The export/import feature of OracleAS Portal supports staging of content from one or more development sites to a production site. A new overwrite mode allows imported objects to replace their predecessors on the target site, while preserving object relationships and user customizations. In addition, the granularity of export has been improved so that individual pages and other objects can be exported, without having to export an entire Page Group.

**Portal: Pages**

41. Can managers define a default portal experience for each user?

Yes. Managers can define a default Portal experience for each user.
Once a user is authorized, that user can be granted permission so that it views/manages the desired Items, Page or Page Group.

Additionally, Oracle Portal allows creation of user groups with a common interest or role. The administration of groups can be delegated to any group member(s), allowing each group to manage its own member list. By using the self-service publishing features of OracleAS Portal, content can be easily targeted to different groups. For example, each group can be assigned a default home page, to which each group member will be automatically directed when they login to the Portal. Page and content metadata can be used to classify content, and saved searches against these classifications can be published as "channels" which direct group members to content of interest.

42. How does the portal determine which part of the portal a user sees when end-user first logs in? Can different users in the system start in different places, for example, in a specific community, or a specific part of the knowledge directory?

Portal's security features can be used to automatically personalize content for different users or groups. Because users only see content for which they are authorized, every user will automatically get a unique version of any page that has multiple security levels. For example, the home page can contain common tabs seen by all users in a company, and additional tabs that are specialized by department. Users in the HR department will only see the HR tab, users in the Finance department will only see the Finance tab, and so on. The same principle can be used for portlets and items.

Users can also be automatically directed to a specific home page by assigning them to a default group, and assigning a default home page to that group.

Hence, different users in the system can start in different places based on the security permission.

43. How many different navigational schemas does the portal support out of the box? Can customers create additional custom navigation schemes?

44. Can different users within the same portal be assigned different navigational schemas?

Yes. Portal's security features can be used to provide different navigational schemas to different users. Users can be automatically directed to a specific home page once they log in.

45. Does your solution offer templates for portal pages? In other words, can a sample page be created once, and then deployed numerous times in different applications?

Yes. Oracle Portal allows creation of Page templates that provide unprecedented control over the appearance of your Portal site. Template defines layout, style, privileges, and content (including portlets and items). When assigned to a page, the page inherits all of these characteristics from the template. When you modify a template, the changes cascade to all pages associated with the template. Page creators can also selectively override certain template characteristics, if allowed by the template. Each page group can have a default template, which is automatically used by all pages within the group unless a page creator chooses another template. Page designers can switch a page to use a different template or detach a page from its template to get full control over the page's appearance.

46. Does the solution support personalize portal pages? Please attach an annotated screen shot of the personalized page.

Yes. Oracle Portal offers an organized, personalized view of the business information, web content, and applications needed by each user. Any web page, application, business intelligence report, syndicated content feed, hosted software service or other resource can be accessed through a portlet, allowing it to be personalized and managed as a service. E.g. If Oracle Collaboration Suite (which leverage a relational database to provide enterprise-class messaging and collaboration applications like Email, Calendar, Oracle Files etc) is added as a portlet in Oracle AS Portal, user will get his personalized view of all this service.

The following screen shot shows yahoo mail integration with Portal. Once “fwcmanager” logs-in, he views this page that is specific to him.
47. How do portal users choose which topics and which tools and services to include in the portal, without customizing the solution? Can the portal user determine the layout of each component embedded in the personalized page?

OracleAS Portal user can choose which topics and which tools and services to include in the portal and can determine the layout of each component embedded in the personalized page. From the Layout Editing mode of a page, users with permission can easily ‘drag and drop’ portlets from portlet repository and add, remove, hide and manage the position of portlets.

The following screen shot shows a sample Layout of a portal page, when the page is in “Layout” mode.

48. Can portal users create multiple personalized portal pages? How does the user interface accommodate multiple pages?

Yes. Portal users can create multiple personalized portal pages. These Pages are managed in Page Groups. Each page group is a collection of hierarchically-arranged portal pages. Each page group can be administered independently, allowing decentralized management of different areas within a portal. For example, a page group
containing human resources information for employees can be maintained by the HR department, while the marketing department can manage its own page group for publishing sales and marketing information.

The following screen shot shows various personalized pages created in a page group named “FWC”.

---

49. Can an administrator assign mandatory portlets to personalized pages?

Yes. Portal’s security features can be used to assign mandatory portlets to personalized pages.

50. Can end users customize a default page from which they start?

Yes. End user who has been granted the necessary access privilege by the administrator can customize a default page from which they start.

51. Can managers create “bundles” of portlets, so that an end user can add a set of related portlets all at once?

Yes. Managers can create such portlets and make them available in the Portal Repository. These portals can be put in a logical group in appropriate folders.

The following screen shot shows a bunch of readily available out-of-the-box portlets (in one of the folders) that can be added all at once in any portal page.
52. Does your solution have end-user online help?

Oracle portal provides HTML based online help files. Help is well organized allowing effective searches and results that contain links to related topics. The following screenshot shows the home page for the online help.

Additionally Oracle has a dedicated technical support team that provides help to customers via phone or mail. There is also an official mailing list where users post their queries and discuss the solution.

53. Does your portal let users e-mail others, inviting them to join communities, or add portlets to their My Pages, or other activities?

Yes. Oracle Portal allows easy and seamlessly integration with application that have facilities like e-mail etc. Oracle Collaboration suite is one product to leverage a relational database to securely, reliably and cost-effectively simplify business communications and consolidate information. Oracle Collaboration suite has components like Email, calendar etc.

Users who have been granted the necessary permission by the administrator can add portlet to their My Pages. The following screenshot shows the various types of access privileges that can be granted to a user. Based on these access privileges a user can work with portal.

54. Can you turn off the ability for users to customize their own pages?
Yes. Administrator can turn off the ability for users to customize their own pages. If a user has “View” access privileges, that user can only view their page and cannot customize it.

Community Pages
55. Can managers create a group workspace where constituents with similar interests can share resources and collaborate?

Yes. Using OracleAS Portal, managers/administrator have the power to connect employees, partners, and suppliers with the information they need and the flexibility to create views tailored to each community. These community members can share resources and collaborate.
The group workspace is created in the form of Page Group. Each page group is a collection of hierarchically arranged portal pages. Each page group can be administered independently, allowing decentralized management of different areas within a portal. For example, a page group containing human resources information for employees can be maintained by the HR department, while the marketing department can manage its own page group for publishing sales and marketing information.

56. Can a single community include multiple portal pages?
Yes. In oracle Portal, group workspace is created in form of Page Group. Each Page Group is a collection of hierarchically arranged portal pages.

57. What is the process for changing the look and feel of a community page?
Oracle Portal allows creation of a style where user can select a particular color for page, portlet, tabs etc. Now this style can be applied in all the pages so as to get a uniform look and feel for all the pages in that Page Group. Any change in the "style" will be applied to all the pages that have adopted the style.

Additionally, various elements (items, portlets etc) in a page can choose their own individual style as shown in the following screen shot.
58. Can the community feature portlets and branding created exclusively for the community?

As per requirement a portlet can be created exclusively for the community or made available for others to reuse them. A page (containing community feature portlets) can optionally be “Published as portlet”, so that it can be included as Portlet in other pages.

59. What types of portlets can be created for the community? Does the process require coding, or can I use templates?

Oracle Portal supports creating of all different types of portlets. It provides three methods for creating portlets:

- **Declarative:** OracleAS Portal enables you to develop most, if not all, of your enterprise portal using its wizard-driven, declarative interface. Portlets are automatically generated for Portal pages, allowing content managed in the Portal to be published anywhere. Wizard-driven tools are also provided for building dynamic portlets that publish information from databases, Web Services, XML documents, Web pages, spreadsheets, search engines, content management repositories, and other data sources.

- **Programmatic:** The OracleAS Portal Developer Kit (PDK) provides a rich set of services for building custom portlets with Java (using the Portal Standard APIs JSR-168, or the Oracle PDK Java APIs), PL/SQL, and other Web-development languages.

- **Oracle Tools:** Oracle tools, including Oracle Reports, Oracle Forms, Oracle Discoverer, and Oracle JDeveloper, have close integration with OracleAS Portal through compatibility with OracleAS Single Sign-On and automated features for creating portlets.

60. Can communities be placed in a hierarchy of related communities? How many levels of sub-communities does the solution support natively?

Oracle Application Server Portal (OracleAS Portal) allows creation of Page Group that is a collection of hierarchically arranged portal pages. Each page group can be administered independently, allowing decentralized management of different areas within a portal.

61. Is it possible for a single community to display different branding for different audiences, so that different constituencies view the same community with different branding? Please attach screen shot of a single community page, branded for different users.

Yes. Oracle Application Server Portal (OracleAS Portal) allows creation of Page that has different look and feel and content for different user.

The following screen shot shows yahoo mail integration with Portal. Once “fwcmanager” logs-in, he views this page that is specific to him.
Does your solution offer templates for whole communities? In other words, can a community be created once, and then deployed numerous times for different audiences?

Yes. Oracle Application Server Portal (OracleAS Portal) allows creation of page templates on which to base pages to set a global style, content and security. Page templates provide unprecedented control over the appearance of your Portal site. A template defines layout, style, privileges, and content (including portlets and items). When assigned to a page, the page inherits all of these characteristics from the template. When you modify a template, the changes cascade to all pages associated with the template. Page creators can also selectively override certain template characteristics, if allowed by the template. Each page group can have a default template, which is automatically used by all pages within the group unless a page creator chooses another template. Page designers can switch a page to use a different template or detach a page from its template to get full control over the page's appearance.

Can I create a hierarchy of folders and content in a community? Does the portal offer a community view of the knowledge directory and of embedded tools and services?

Yes. Oracle portal allows creation of hierarchy of folders and content in a community. The following screen shot shows a sample hierarchy of folders created for Page Group named “FWC”.
Can community members limit a search to the community they are in?

Yes. Oracle Application Server Portal (OracleAS Portal) has Advanced Search capabilities where search can be limited to the community a user belongs to.

The following screen shot shows the user has limited his search option to “FWC” community (which is Page Group in terms of Oracle Portal).
Does the solution offer a Web administration console for all major tasks? Please list the tasks that can be performed over the Web. Are there any administrative tasks that cannot be performed through the administration console?

Oracle Application Server Portal (OracleAS Portal) provides centralized Web administration console for all major tasks.

OracleAS Portal's management features make it easy for a single administrator or a group of administrators, each with specific responsibilities, to maintain and manage a portal instance. Simplify administration with a flexible management model by:

- **Administering the Portal Through Managed Delegation.** The portal environment is administered and managed through built-in portlets on pre-defined administration pages. By applying privileges to page-level security, portal administration tasks can be delegated without compromising overall portal security.

- **Streamlining User Management with Single Sign-On.** Reduce IT support costs and improve security with single sign-on (SSO) and centralized user provisioning while complying with Java standards. Centralized user provisioning ensures a single definition of users, roles, groups and access rights instead of a patchwork of security with unknown gaps. Third party LDAP directories can be synchronized with OID using built-in metadirectory capabilities.

- **Monitoring Portal Services with Oracle Enterprise Manager (OEM).** Integration with Oracle Enterprise manager (OEM) allows an administrator to manage the services underlying a portal installation from a single administration console. Through the OEM user interface, an administrator can monitor data and events, maintain mid-tier and portal configuration files, and monitor the components used in the portal environment, including Oracle HTTP services, mod_PL/SQL services, Web Cache services, the servlet engine, the portal database, SSO, and portlet providers.

**Administrative Hierarchy**

If you have a folder system for storing administrative objects, please include a screenshot. If you do not have a folder system for storing administrative objects, please explain how customers manage large deployments with thousands of administrative objects.

**User Management**

What administrative roles does the system support? Can administrative roles be customized?

In OracleAS Portal, administrator can set group roles (i.e. Public Groups Assignment) or individual roles (i.e. Privilege Assignment). These administrative roles are customized. The details are as follows:

1) **Public Groups Assignment**
   - Privilege Group Grant members full DAS privilege
   - DBA PORTAL - PORTAL Database Administrators
   - PORTAL_ADMINISTRATORS PORTAL - PORTAL Non-DBA Privileged Administrators
   - PORTLET_PUBLISHERS PORTAL - PORTAL Group the privilege of publishing portlets
   - PORTAL_DEVELOPERS PORTAL - PORTAL Group with the privilege of creating applications

2) **Privilege Assignment:**
   - User creation - Allow user creation
   - User editing - Allow user editing
   - User deletion - Allow user deletion
   - Group creation - Allow group creation
   - Group editing - Allow group editing
   - Group deletion - Allow group deletion
   - User privilege assignment - Allow privilege assignment to users
   - Group privilege assignment - Allow privilege assignment to groups
   - Configuration - Allow Delegated Administration Service configuration
   - Resource management - Allow resource management for Oracle Reports and Forms based applications

Hence, the administrative role of the technicians who maintain the system has a “PORTAL_ADMINISTRATORS” role where as subject-matter experts who contribute content to the system has “PORTAL_DEVELOPERS” privilege. Also, multiple content experts role can be set, with content management privileges for specified sections of the portal.
68. Can group and user activity rights for the portal, content management and collaboration systems be assigned from one console?

Oracle Application Server Portal (OracleAS Portal) provides a simple web based console where administrator can manage group and user activity rights for the portal.

The following screen shot shows a portion of the administrator page where it can be done.

<table>
<thead>
<tr>
<th>Public Groups Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Privilege Group</td>
</tr>
<tr>
<td>PORTAL_ADMINISTRATORS</td>
</tr>
<tr>
<td>PORTAL_DEVELOPERS</td>
</tr>
<tr>
<td>DBA</td>
</tr>
<tr>
<td>PORTLET_PUBLISHERS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Privilege Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow user creation</td>
</tr>
<tr>
<td>Allow user editing</td>
</tr>
<tr>
<td>Allow user deletion</td>
</tr>
<tr>
<td>Allow privilege assignment to users</td>
</tr>
<tr>
<td>Allow group creation</td>
</tr>
<tr>
<td>Allow group editing</td>
</tr>
<tr>
<td>Allow group deletion</td>
</tr>
<tr>
<td>Allow privilege assignment to groups</td>
</tr>
<tr>
<td>Allow Delegated Administration Service configuration</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resource Access Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Oracle Reports and Forms based applications.</td>
</tr>
</tbody>
</table>

69. Can users and groups be imported from external directory systems? How does the system ensure that this information is up-to-date?

Yes. Users and groups can be imported from external directory systems to Oracle Internet Directory (OID). OID is OracleAS Portal’s repository for user and group definitions. The Oracle Directory Integration Platform synchronizes data between various directories and OID. The Oracle Directory Integration Platform is a set of services and an interface that makes it possible to develop synchronization solutions with third party metadirectories and other enterprise repositories, such as Microsoft Active Directory.

70. Does the solution support groups within groups?

71. Can the solution create a master profile of each user based on information imported programmatically from external systems? From what systems can the profile contain user information?

Yes. Master profile can be created based on information from external systems.
Oracle Portal uses Oracle Internet Directory (OID) as a repository for user and group definitions. Oracle Internet Directory includes an agent for out-of-the-box synchronization with Oracle Human Resources and an agent for synchronizing information with select third-party LDAP servers, such as iPlanet Directory Server.

Additionally, connectors can be written to provide synchronization of OID with LDAPv3 compliant directory servers.

72. Describe how the solution makes use of the information contained in a user profile.

Oracle Internet Directory is a standards-based LDAPv3 directory that leverages the scalability, high availability and security features of the Oracle Database to manage user identities and passwords. Oracle Portal provides single sign-on functionality through Oracle Single Sign-on, which uses Oracle Internet Directory as a repository. In addition, Oracle9iAS Portal leverages Oracle Internet Directory's Directory Integration and Provisioning system to maintain tight synchronization for Portal users and groups, enabling detailed customization of the Portal. For example, a user's promotion from salesperson to sales manager in a Human Resources application, synched with Oracle Internet Directory, can enable Oracle Portal to display an entirely new interface to that user upon next login.

73. Can the collaboration, content management and portal products share the same user profile information?

Yes. Oracle Internet Directory (OID) serves as a central storage location for numerous Oracle product features, including Oracle Database's Advanced Security Option, Oracle Collaboration Suite, Oracle Application Server Single Sign-on, and Oracle E-business Suite Applications.

For more information on OID, please refer this link: http://otn.oracle.com/products/oid/index.html

74. Can this profile be displayed to end-users? Is each field in the profile individually secured?

Yes. Oracle Internet Directory implements a number of security features, for example access control lists and strong authentication through SSL, which provide a highly flexible framework for managing and distributing data. And since this data is ultimately stored in the Oracle database, it is also protected from loss.

75. Is the information in the user profile available to developers who wish to automate the personalization of portal components by using information from the profile?

Oracle Application Server Portal provides Portal Development Kit (PDK) framework. Using the JPDK (which is a part of PDK) information in the user profile can be available to developers who wish to automate the personalization of portal components.

76. How is a user profile secured? Is the information about a user secure at the field level, i.e. only the users with appropriate privileges can view particular information about other users?

Yes. Oracle Internet Directory implements a number of security features, for example access control lists and strong authentication through SSL, which provide a highly flexible framework for managing and distributing data. And since this data is ultimately stored in the Oracle9i database, it is also protected from loss.

Portal: Security

77. How many levels of security are allowed on portal objects?

Oracle Portal provides multiple levels of security on Portal objects. These are:

**Authenticating users** - OracleAS Portal takes advantage of OracleAS Single Sign-On (SSO) architecture for user authentication. Through SSO, users login to Oracle Application Server and gain access to any SSO-enabled application for which they are authorized, without having to re-enter the user name and password. SSO itself is fully integrated with Oracle Internet Directory, and supports integration with 3rd party security management products such as Netegrity SiteMinder®.

**Managing users and groups** - Oracle Internet Directory (OID) is OracleAS Portal's repository for user and group definitions. Users can be provisioned through user management screens in OracleAS Portal, or with the administration tools and APIs provided with OID. Third party LDAP directories can be synchronized with OID using built-in metadirectory capabilities.

**Applying and managing access controls** - Access control lists (ACLs) are used throughout to manage user and group privileges on portal objects (pages, styles, items, portlets, etc.). Administrators can delegate ACL responsibility to object owners, who can specify the users/groups and their privileges to access, customize, or modify the object. In addition, an administrator can grant global privileges on all objects of a given type.
Deploying over secure networks - The portal is easily configured to support communication with users and remote portlet providers over an SSL connection.

78. Please describe the security roles available in the system. Does the system support different administrators, for different parts of the portal?

Yes. Oracle Portal allows different administrator for different parts of Portal.

The following screen-shot shows it is possible to grant Portal Administrator, Portal Developer, DBA, Portal Publisher to user or Group.

<table>
<thead>
<tr>
<th>Privilege Group</th>
<th>Grant members full DAS privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>PORTAL_ADMINISTRATORS</td>
<td>PORTAL - PORTAL Non-DBA Privileged Administrators</td>
</tr>
<tr>
<td>PORTAL_DEVELOPERS</td>
<td>PORTAL - PORTAL Group with the privilege of creating applications</td>
</tr>
<tr>
<td>DBA</td>
<td>PORTAL - PORTAL Database Administrators</td>
</tr>
<tr>
<td>PORTLET_PUBLISHERS</td>
<td>PORTAL - PORTAL Group the privilege of publishing portlets</td>
</tr>
</tbody>
</table>

79. Does the system allow privileges to be assigned to groups of users? Can users with a group password register to enter groups on their own?

Yes. Oracle Application Server Portal (OracleAS Portal) allows privileges to be assigned to groups. Access control lists (ACL) are used throughout to manage user and group privileges on portal objects (pages, styles, items, portlets, etc.). Administrators can delegate ACL responsibility to object owners, who can specify the users/groups and their privileges to access, customize, or modify the object. In addition, an administrator can grant global privileges on all objects of a given type.

80. Can the portal import users and groups from other systems, such as Windows NT?

Yes. Portal can import users and groups from other systems. Oracle Application Server Portal (OracleAS Portal) uses Oracle Internet Directory (OID) as a repository for user and group definitions. Users and groups from any LDAP v3 compliant directory such as Windows NT, iPlanet, Microsoft Active Directory can be imported to OID.

81. Can the portal import users and groups from LDAP-compliant systems? Does the solution support dynamic LDAP groups?

Yes. Users and groups can be imported from external directory systems to Oracle Internet Directory (OID). OID is OracleAS Portal's repository for user and group definitions. The Oracle Directory Integration Platform synchronizes data between various directories and OID. The Oracle Directory Integration Platform is a set of services and an interface that makes it possible to develop synchronization solutions with third party metadirectories and other enterprise repositories, such as Microsoft Active Directory.

82. Does your portal work with Microsoft’s Active Directory Service (ADS)?

Yes. Portal can work with Microsoft’s Active Directory Service.

Oracle Application Server Portal (OracleAS Portal) uses Oracle Internet Directory (OID) as a repository for user and group definitions. The Oracle Directory Integration Platform synchronizes data between various directories and OID. The Oracle Directory Integration Platform is a set of services and an interface that makes it possible to develop synchronization solutions with third party metadirectories and other enterprise repositories, such as Microsoft Active Directory.

For more information please refer:

http://otn.oracle.com/products/oid/otn_faq.html
83. Kerberos is a network security standard implemented in Windows 2000. Is your solution Kerberos-compliant? What about digital certificates?

Oracle support kerberos authentication in two ways:
a) Database client-server (fat client) authentication can use kerberos.
b) Oracle Application Server SSO supports kerberos as part of Windows Native Authentication.
Specifically, SSO can obtain a user’s identity from a Microsoft Windows kerberos token once a user has logged in to Windows.

84. Please explain the system’s support for secure sockets layer (SSL).

The portal is easily configured to support communication with users and remote portlet providers over an SSL connection.

Oracle Application Server Portal (OracleAS Portal) is a component of OracleAS. OracleAS Portal uses the 3-tier infrastructure that utilizes the power of the Apache HTTP platform and OracleAS Server software, which supports full end-to-end security between the client and server through user/password directory and database access, IP address/Domain restrictions, Digital Certificate (X.509), and SSL 2.0 and 3.0 schemes.

85. Please describe how the system accesses secure data sources, such as a password-protected Web site or a secure file server? How does the system preserve the security of that content on the portal? Does the system prevent portal administrators from accessing secure data sources to which they do not have permissions, or must portal administrators be given administrative passwords to all host systems?

Oracle Files, a component of Oracle Collaboration Suite, leverages the power of the Oracle Database and Application Server to provide a reliable, How does your portal integrate with security systems from different underlying applications? Does your Enterprise Web solution support single sign-on?

Oracle web single sign-on is an important security feature of Oracle Application Server (OracleAS). Oracle web SSO technology provides single sign-on for web users. OracleAS SSO is the native authentication mechanism for OracleAS and its components. It provides a framework for secure SSO from browser clients to web-based applications, including Oracle Applications and Tools, through standard protocols. It supports both partner applications, which take full advantage of the SSO framework, as well external applications for support of legacy and third party products.

For more information on Oracle SSO, please refer http://otn.oracle.com/products/ias/daily/feb28.html

86. Does the portal provide policy management and identity management?

Oracle Identity Management which is a part of OracleAS is a comprehensive, integrated set of services for managing users and their privileges. It is released as part of OracleAS 10g but supports all Oracle products. Oracle Identity Management is an integrated, scalable and robust identity management infrastructure. Oracle Identity Management includes an LDAP directory service, directory integration and provisioning services, a delegated administration service application, authentication and authorization services, and an X.509 V3 certificate authority.

Portal: Knowledge Management

Universal Search
88. Does the Enterprise Web solution include a search engine?

Yes, Oracle Portal provides Ultra Search for all searching purposes.


89. Does each component of the solution use the same search engine?

Yes, all components use the same search engine in Oracle Portal.

90. What types of resources can the solution index in the search collection? Describe the process by which a user would discover all of those items. How many searches would be required, and where would they be performed?

Ultra Search uses a ‘crawler’ to index documents; the documents stay in their own repositories, and the crawled information is used to build an index that stays within your firewall in a designated Oracle database.
Oracle Ultracearch lets you index and search web sites, database tables, files, mailing lists and Oracle Portal user-defined data sources.
91. Does each kind of resource—portlets, documents, users, etc.—require a separate index?

Oracle adds new multisource search capabilities through Oracle Ultra Search, which lets you easily combine data from multiple source types into one searchable index and provides a configurable crawler. The crawler visits the specified data sources at scheduled times, follows links ("crawls") to other pages, and creates a single, searchable index. Besides Oracle databases, Ultra Search can search text across other databases, Web pages, files, mail servers, Oracle9i Application Server (OracleAS) Portal, and more—whether the sources are located on an intranet or the internet.

92. Does the search engine generate a summary of each indexed resource? Does the search engine generate other metadata?

Oracle Text has always allowed full-text indexing from multiple data sources, including those that are available via internet or intranet. A missing piece in Oracle Text had always been the ability to combine data easily from these multiple source types into one searchable index. With the introduction of Oracle Ultra Search in Oracle9i Database, however, there is now a tool that allows developers to perform that task easily. Furthermore, Ultra Search provides a configurable crawler that can, for example, combine your database table data with strategic data from the Web, e-mail, and files.

Ultra-search also allows you to customize metadata according to the different repositories, and search according to different metadata elements from different repositories.


93. How many objects can the search engine index? Which customer has the largest search collection?

Each Ultra Search instance is identified by name and has its own crawling schedules and index. As many instances as necessary can be created.


94. Is the search fully integrated into the Enterprise Web solution, or administered separately?

Oracle Ultra Search is fully integrated into Oracle Portal.

95. Does the portal force indexing with use of taxonomy terms at point of document check-in?

Oracle Portal’s Ultracearch does this by selecting the "Process all documents" radio button in the Edit Schedule page. This is a very expensive operation. Therefore, this option should be the last resort.

96. Does the search technology include search result highlighting?

Portal’s ultrasearch portlet uses Oracle Text internally. Oracle Text provides highlighting and gisting functionalities for that purpose. Oracle Text provides hierarchical feedback functionality to suggest modifications to the queries in case the user is dissatisfied with the query hits.


97. Does updating a single field or property of a document require reindexing the whole document?

98. Are changes to indexing/classifications of documents “universal,” or do documents need to be moved and re-indexed? That is, can the administrator of the document simply re-point to the document or does the location of the document need to be moved and changed also?

99. Does it allow for both free-text as well as drop-down search mechanisms? What about parameter searching?

Yes, Oracle Ultra Search allows free-text as well as drop down search. In Ultra Search Crawler can be configured with parameters.
100. Does the search engine support pattern matching?
Oracle Ultra Search supports pattern matching.
For more information please refer:
http://otn.oracle.com/products/text/htdocs/Text_Search_Db_Website.html

101. Can search be federated over multiple repositories?
Oracle Ultra Search, a new feature of Oracle, provides an "Out-of-the-Box" solution that can find your information wherever it lives:
For Example **Searches content regardless of where it is stored** - in Oracle and non-Oracle databases, on Web servers, in files on disk, on corporate mail servers. Ultra Search uses a "crawler" to crawl, index and make searchable your corporate Intranet; the documents stay in their own repositories and the crawled information is used to build an index that stays within your firewall in a designated Oracle9i database

102. Does the search engine support personalization attributes? For example, can a user-specified search query be saved as a user preference?

103. If the solution features a third party search engine, does technical support on the search index come from the portal vendor or the search engine vendor?

104. If the solution features a third party search engine—such as Verity or Autonomy—is the search engine managed separately, or as part of the portal application?

105. If the solution features a third party search engine, how do you synchronize security between the portal and the search index?

*End User Features*

106. Can users browse the knowledge directory via the Web?
Yes, Oracle Portal is completely web-based and users can browse the knowledge directory via web.

107. Can the knowledge directory organize resources in the taxonomy by subject, rather than by origin? Can the system categorize documents and resources from different locations, hosted by different systems, but about the same subject, in one section of the taxonomy?

108. Is every object in the knowledge directory separately secured?

109. Do objects in the knowledge directory inherit folder security?
Yes, Objects in the knowledge directory inherit folder security, however additional security restrictions can be defined on the individual objects.

110. Can a user notify other users via e-mail about resources in the knowledge directory?
Oracle Portal has notification mechanism, delete/update/add the contents to knowledge directory can be notified via email with minimal coding.
111. Describe the ways in which a user can sort search results.

Search results can be sorted when using basic search /advance search or oracle ultra search.

112. Can a user search based on keywords? Based on metadata like author or subject?

**Yes**, Oracle Text can intelligently process search queries using several strategies:
For example, Keyword searching enables searching for keywords in a document. User enters one or more keywords that best describe the query.

113. Are Boolean logic and operators embedded in the search capability? Which ones?

**Yes**, Boolean operators embedded in search capabilities, they are And, or and NOT.

114. Can users make additional queries to further narrow a set of returned search results?

Search can be improved if it can be narrowed down what part of a ‘document’ a piece of information occurs in - the title, the body, the name of the author and so on. For example, search results for ‘London’ differ when you look for an author name, versus a title. Generally, different repositories have different such ‘metadata’ attributes that may be attractive for searching against - databases identify columns and email servers know header/body/attachment.

115. Does the search perform spelling corrections?

**Yes**, Ultra Search has alternative spelling option using which spelling correction can be done.
Alternate Spelling – Some languages, such as German, have alternate ways of spelling words with accented characters. For example, the words “Muenchen” and “Muenchen” are considered identical. If the alternate spelling index option is chosen, then both of these words will be indexed as “Muench”. The same transformation is applied at query time, so a search for either term will match “Muenchen” in the index.

116. Can the user limit a search to a section of the knowledge directory?

Query options allow users to limit their searches. Searches can be limited to document attributes (e.g. TITLE, AUTHOR) and data groups. Data source groups are logical entities exposed to the search engine user. When entering a query, the search engine user is asked to select one or more data groups to search from. Each data group consists of one or more data sources.

117. Can the user limit a search to objects connected to a community?

Refer 116.

**Architecture**

118. How does one extend the system to scan new repository types?

119. What types of document formats does the knowledge directory support?

Oracle Portal knowledge directory supports document formats such as html, xml, MS-Word and PDF.

120. Can the customer or third parties extend the system to index new document formats?

**Yes**, Using JPDK the customer can extend the system to index new document formats.

121. How does the knowledge directory connect to documents and resources in a separate repository?

Oracle portal has omni portlet; using omni portlet remote repository can be configured with the files directory.

For more information refer:

[http://portalstudio.oracle.com/pls/ops/docs/FOLDER/COMMUNITY/OTN_CONTENT/MANIPAGE/KEYFEATURES_BENEFITS/PORTAL_FOV_0.HTML](http://portalstudio.oracle.com/pls/ops/docs/FOLDER/COMMUNITY/OTN_CONTENT/MANIPAGE/KEYFEATURES_BENEFITS/PORTAL_FOV_0.HTML)
122. How does the system link to content, such as documents on file servers, which is not accessible via the Web?
Oracle Portal has omni portlet; using omni portlet can read the documents on file server.
For more information refer:
http://portalstudio.oracle.com/pls/ops/docs/FOLDER/COMMUNITY/OTN_CONTENT/MAINPAGE/KEYFEATURES_BENEFITS/PORTAL_FOV_0.HTML

123. Using crawling agents or spiders, can the system automatically scan repositories for new documents to index? Are such agents components of a third-party search engine, or developed specifically for the Enterprise Web? Can crawls be scheduled? Are those agents administered separately?
Ultra Search uses a "Crawler" to index documents; the documents stay in their own repositories, and the crawled information is used to build an index that stays within your firewall in a designated Oracle Database. Further, several search engine vendors, including Alta Vista, Autonomy, Inktomi, Open Text, and Verity are members of the Oracle Portal Partner Initiative and have integrated their products with OracleAS Portal.

124. What types of storage systems can such crawling agents scan? Indicate whether the crawling agents can only access each system via the Web, or whether it can recognize the native security and organizational schema of the host system to find the appropriate content.
Oracle Ultra Search is an out-of-the-box search solution that provides search across multiple repositories - Oracle databases, IMAP mail servers, HTML documents served up by a Web server, files on disk and many more. Ultra Search enables a ‘Portal’ search across the content assets of a corporation, bringing to bear Oracle’s core capabilities of scalability and reliability.
Ultra-search also allows you to customize metadata according to the different repositories, and search according to different metadata elements from different repositories.

Administration
125. Does the system support multiple content experts, with content management privileges for specified sections of the portal?
Yes, Oracle Portal supports multiple content experts with content management privileges for specified sections of the portal.
126. Can administrators schedule resource-intensive administrative tasks, such as scans for new content or broken links, updates to the knowledge directory, or importation of new users? Can administrative tasks be scheduled as a group, with dependencies between tasks within a group?
Using Oracle 10g Enterprise manager, administrators can schedule resource-intensive administrative tasks, such as scans for new content or broken links etc.
127. Is there a process for approving content posted to the portal and e-mail updates?
Oracle Portal has built in Approval/Notification support. It provides out of the box approval and notification portlets and it also has built in workflow process for approving content.
For more information:
http://portalstudio.oracle.com/pls/ops/docs/FOLDER/COMMUNITY/OTN_CONTENT/MAINPAGE/PUBLISH_CONTMGMT/TECHNOTE_SUB.HTML

128. Does the system automatically remove links to documents from the knowledge directory that no longer exist in host systems?
Oracle Portal shows broken links to the documents from knowledge directory that no longer exist in host system.

129. Is there a distributed security and maintenance scheme for empowering different business experts to maintain different parts of the directory?
130. Can entire sections of the knowledge directory be secured?

**Ready-Made Application Integration**

131. How does your platform integrate with Microsoft Exchange? At what revision level?

OracleAS (Oracle Application Server) Portal offers downloadable portlets for integrating with Microsoft Exchange Server. A portlet is an area of HTML/XML located within a defined area of a Web page. Portlets communicate with the portal through an entity called a provider. Portlets form the fundamental building blocks of a OracleAS Portal page. The Microsoft Exchange 5.5 & Exchange 2000 portlet provider provides three portlets: the Inbox portlet, the Calendar portlet, and the Contacts portlet. Each of these portlets renders information associated with a user's Exchange 5.5 / Exchange 2000 mailbox. The Inbox portlet displays messages from the user's Exchange inbox. The Calendar portlet displays today's appointments and meetings for the given user. The Contacts portlet displays the user's list of contacts.

**Foundation Service: Content Management**

132. Can I use one content management system to manage portal content, intranets, extranets, and Web sites?

For sites that need a single application for managing and publishing content, Portal has a built-in, complete set of features for both document and Web content management. With these self-contained features, OracleAS (Oracle Application Server) Portal enables users to create, maintain, publish, and search business content without having to leave the portal for an external application. Portal’s content management features promote document sharing, collaboration, and process automation with built-in controls (exposed through a browser-based application), such as versioning, check in/check out, automated publishing and expiry, and multi-step approval routing. In fact, any type of content, including content metadata, can be managed in the extensible Portal repository. Support for the WebDAV (Web Distributed Authoring and Versioning) standard allows desktop applications to interact directly with content stored in the repository, and repository APIs and JSP support open the repository up to external applications. The content management features can also be used to enhance the portal’s appearance and user interaction. Since content is not an afterthought in OracleAS Portal, its content management features allow users to create content rich portal pages that conform to corporate style standards. This is an essential feature for building externally facing portals that are directed at customers, suppliers, and partners. With content management built right in, it is also easier to leverage the complete portal framework offered by OracleAS Portal to improve the relevance, accessibility, timeliness, and accuracy of content. Content can be maintained and accessed directly in the context of enterprise applications that are integrated into the portal. Page hierarchies, single sign-on, personalization, search, mobile device support, subscriptions, notifications, collaboration, and globalization make content easier to access. And many of the management and performance features offered by the portal framework are also required in a content management system - features like user provisioning and access control, caching, and usage monitoring. Overall, having a single application for both managing and publishing content reduces cost and complexity, compared to portal solutions that require integration with third-party content management systems.

133. Can I publish content to a directory that contains other resources? Will it inherit the security established in the taxonomy?

OracleAS Portal provides an integrated set of features for self-service document publishing, file upload, page formatting, and access control. Collaborators and content publishers no longer need specific technical skills or a webmaster to publish their content. Instead, they simply access an OracleAS Portal regions to publish their content and format content appearance using simple UI controls. A region includes built-in features for publishing, organizing, classifying, cross referencing, and displaying content that it manages. Key components that make up a region include folders that contain and display content, the content itself (termed items), and styles that define how folders and items within folders are displayed (font, size, color, position, etc.). The content area also includes components that assist users in navigating or locating content of interest (navigation bar and search) and classifying their content (categories and perspectives). Folder and item access may be explicitly granted to users or user groups. Regions are created by administrators for use by a particular user community or line of business. Once created, the content area administrator and folder owners set user access privileges on folders within the content area. Content areas allow folder owners to organize content in formal, top-down information taxonomy, an established corporate organization, or an informal, adhoc structure. New content can be added to existing folders, to new folders within the existing content area, or, if appropriate, to a new content area.

134. Is published content searchable from one place, regardless if it’s published to intranets or the portal? Is content published with the solution searchable seamlessly with other content in the Enterprise Web?
OracleAS uses Oracle Text to provide advanced searching capabilities against content stored in the Portal. Users can search by keyword, by metadata (attributes, categories, etc.), or both. Portlets are provided for both search submission and search results. These portlets can be customized to provide a variety of different search experiences, from basic keyword searches to advanced searches on a configurable list of content metadata. Oracle Text supports searches against over 100 document types, including HTML, XML, PDF, word-processing formats, spreadsheet formats, presentation formats, and other common business formats. OracleAS Portal also features built-in integration with Oracle UltraSearch. Oracle Ultra Search provides uniform search-and-locate capabilities over multiple repositories - multiple Portal repositories, Oracle databases, IMAP mail servers, HTML documents served up by a Web server, or files on disk. Ultra Search uses a "Crawler" to index documents; the documents stay in their own repositories, and the crawled information is used to build an index that stays within your firewall in a designated Oracle Database. Further, Several search engine vendors, including Alta Vista, Autonomy, Inktomi, Open Text, and Verity are members of the Oracle Portal Partner Initiative and have integrated their products with OracleAS Portal.

135. What kind of content creation roles does your Enterprise Web solution support natively? Can content creation responsibilities be delegated to different types of contributors?

OracleAS Portal's management features make it easy for a single administrator or a group of administrators, each with specific responsibilities, to maintain and manage a portal instance. The portal environment is administered and managed through built-in portlets on pre-defined administration pages. By applying privileges to page-level security, portal administration tasks can be delegated without compromising overall portal security. The portal can be decentralized into a series of independently administered page groups. Each page group is a collection of related portal objects, including pages, templates, styles, navigation pages, categories, perspectives, and custom types. Most management functions, such as access control, export/import, style and template administration, metadata administration, etc., can be delegated to page group administrators, who in turn can delegate many functions to individual page owners. Corporate standard styles, templates, metadata, and other content elements can be enforced at the portal level and shared across page groups. Access control lists (ACL) s are used throughout to manage user and group privileges on portal objects (pages, styles, items, portlets, etc.). Administrators can delegate ACL responsibility to object owners, who can specify the users/groups and their privileges to access, customize, or modify the object. In addition, an administrator can grant global privileges on all objects of a given type. Browser-based wizards and integrated editing dialogs make it easy for page designers to publish and manage the content that appears on their pages. Business level users can also use this publishing environment to easily define collaborative work areas and to publish their business documents. No knowledge of HTML is required. File-type content can also be published via the Web-based Distributed Authoring and Versioning (WebDAV) protocol. Users can simply drag and drop content, files, and folders between portal pages and the desktop. File-type items can also be opened, edited, and saved directly from WebDAV desktop applications like MS Office 2000.

136. How can users keep track of content they are modifying?

Any user with view privileges on a page can subscribe to a page or an item on a page. The Notifications portlet tells the subscriber when the page or item has been changed or deleted so that he/she can keep track of the changes. Also, to ensure the validity of content, Oracle9iAS Portal can route content for approval before it is published on the page. Simple or multi-step processes can be defined with single or multiple reviewers at each step. Notifications are sent to each approver in the approval chain indicating that action is required, while the Status portlet tracks the item's progression from the submitter's point of view.

137. Do content creators need to know how to program in HTML to build portal Web pages?

Page design and development features within OracleAS Portal give administrators, page designers, and end users a powerful environment in which to create content rich, secure, portal pages - no programming is required! Page content can include both portlets (re-usable components that expose an underlying information source) and content items (individual pieces of content - text, image, hyperlink, etc. - that reside on a page). A simple wizard walks a page designer through the steps of creating a page, defining its geometry, and setting page-level properties. An editing dashboard provides additional controls and multiple views to add portlets or items to the page and update page properties. An integrated style manager allows designers to define color and font schemes that can be applied to a portal page or page region. No knowledge of HTML, coding, or editing of configuration files is required!

138. Can I manage intranets with the solution? How are they administered and secured?

OracleAS Portal can include individual applications catering to different set of users, for example all the intranet users. Different applications can be built into individual page groups. These individual applications or page groups can be managed by a single administrator or can be delegated to different user groups. OracleAS Portal offers Access Control List feature to manage access and privileges on all entities like page & items.
139. Does the content management solution include workflow capabilities? Please describe.

OracleAS Portal comes with an out-of-box Workflow Notification Portlet. This web portlet uses Oracle workflow to display notification on portal interface. Actions like lock and reassign can be taken on each notification. Customization of notification is based on status and sort order. Notification can have 2 status i.e. Open or Closed. Notification can be sorted based on Application name, Date and Subject. Comments while taking action can be added to each notification. Items are locked for the duration of the approval process. As an alternative to viewing items pending approval in the Notifications portlet, a user can also enter Pending Items Preview mode to see these items directly on the current page. The Pending Items Preview mode can be entered while editing the page. From this mode, page group administrators and page managers can approve or reject items, thereby overriding the approvers on the official approval chain. Approvers can also approve items, while submitters can delete rejected items, or update and re-submit them. The Pending Approvals Monitor can be used by administrators to list (and, if necessary, override) pending approvals across all page groups they administer.

Users with Manage With Approval privileges can now copy an item onto pages which the user has Manage With Approval privileges. The copied item will be placed in Pending Approval mode. Rejected items can be deleted to remove them permanently. Undeleting a rejected item restores the item to its rejected status. To preserve the integrity of approval processes, if any item is currently pending against a step in an approval process, that step cannot be modified; that is, neither the list of approvers nor step characteristics can be changed. In addition, active steps in an approval process cannot be deleted or reordered.

Further, portal implementations that want to integrate their business processes into their enterprise portal can use the capabilities of Oracle Workflow (a component of Oracle Application Server). Portal implementations can route information of any type according to user-defined business rules to model, automate, and continuously improve business practices. Both traditional, applications-based workflow as well as e-business integration workflow are supported. Oracle Workflow delivers a complete workflow management system that supports business process based integration. Its technology enables modeling, automation, and continuous improvement of business processes, routing information of any type according to user-defined business rules.

140. How are users notified of a pending task to modify, approve, or publish content?

Please refer to the answer above, which discusses the Notification portlet. Further, the portlet can be customized to send emails as notifications.

141. Does the solution have version control capabilities? Can the solution detect and report the last modified dates of files?

Portal administrators set the policies for content types, their attributes, and how both are managed for the pages within a portal. These policies provide precise control over content item attribution, attribution values, and how attributes are presented. Additional features such as content routing and approval, item version control, check-in/check-out, automated publish and expiration dates, and automatic indexing support collaborative document creation, ease content management tasks, and make finding published items easy.

142. Can I capture an audit log on published content?

Audit log features can be built in OracleAS Portal by extending out of box portlets.

143. Can the portal deliver content based on user attributes or preferences?

Page owners and administrators control the extent to which other users can customize the page using page privileges. Users can be granted the ability to customize or personalize the information they see on a page (hide, add, etc.) and how it is arranged. In this way, a page designed for a general audience can be personalized for each user to make it more relevant to the job they do and the way they work. This feature results in unique views of information (displayed within a page) to be generated for each user based on their privileges - only the content they are authorized to see will display and operations they are allowed to perform will be available. The portlet 'provider' implementation determines the level of customization and security that apply to each portlet. Customization options range from no customization allowed to both style and content customization. Per user, per instance-level portlet personalization offers significant productivity gains to both the portal developer and the portal user. Multiple instances of the same portlet can be added to a single page, each with its own, independent personalization settings.

144. Are portlets available to allow users to manage content from the portal?

Browser-based wizards and integrated editing dialogs make it easy for page designers and end users to publish and manage the content that appears on pages. The users can use this publishing environment to easily define collaborative work areas and to publish their business documents. A simple wizard guides a publisher through the steps of defining content, adding attributes, and publishing to a page. No knowledge of HTML is required. Virtually any type of content can be published, including files, simple text, hypertext links, images and server-side scripting. Page and page region properties set by the page
designer automatically format and display the content on the page with the proper color, font, location, alignment, and so on. The pages themselves are organized within a page group, which can be used to create ad hoc or carefully controlled content taxonomies. A user with Full Customization privileges can add portlets to a page and delete, move, hide, or show any portlet on the page. A user with Add Only Customization privileges can add portlets to a page and remove, hide, or show those portlets that he or she has added. A user with Hide-Show Customization privileges can hide or show any portlet on the page. A user with Style Customization privileges can apply a different style to the page to customize the page color and fonts. A user with View Only privileges can view the content of the page, but cannot add, remove, show, or hide any of that content.

Portal's security features can be used to automatically personalize content for different users or groups. Because users only see content for which they are authorized, every user will automatically get a unique version of any page that has multiple security levels. For example, the home page can contain a common tab seen by all users in a company, and additional tabs that are specialized by department. Users in the HR department will only see the HR tab, users in the Finance department will only see the Finance tab, and so on. The same principle can be used for portlets and items. Users can also be automatically directed to a specific home page by assigning them to a default group, and assigning a default home page to that group.

145. Can I customize the look and feel of published content?

OracleAS Portal offers extensive customization capabilities, which can range from simple, but powerful wizard driven customization to extending the source of a portlet. Page design and development features within OracleAS Portal give administrators, page designers, and end users a powerful environment in which to create content-rich, secure, portal Pages. Based on the privilege granted, as mentioned in the answer above, an end user can customized various aspects of his page for example page banners and navigation bars.

146. Can I publish documents with the system? Images?

Virtually any type of content can be managed by OracleAS Portal. Individual content elements are called items, and items are added directly to Portal pages using Portal's browser-based self-service publishing wizards. Item types can include:

- Files: Documents of any type (e.g. MS Office, PDF, images, etc.)
- Text: Text (including HTML) can be added directly to a Portal page. A rich text editor allows WYSIWYG editing of HTML
- Links: Hypertext links to Portal pages and items or to any resource that can be targeted by a URL. Special "Smart Links" automatically generate links to Portal resources such as the user's home page
- PL/SQL: PL/SQL script that is executed when a page is rendered

147. Describe how a specific customer uses the content management system in production.

OracleAS Portal takes advantage of OracleAS Single Sign-On (SSO) architecture for user authentication. Through SSO, users login to Oracle Application Server and gain access to any SSO-enabled application for which they are authorized, without having to re-enter the user name and password. SSO itself is fully integrated with Oracle Internet Directory. An end user / customer enters the user name and password only once, at a central corporate Web portal, to access all the needed applications. From the user's perspective, authentication to each application happens transparently. The way a customer users the content management system varies and depends upon the requirement – it may vary from simple viewing & download to manage the content (with requisite rights).

Foundation Service: Collaboration

148. Does the solution include project-based collaboration?

OracleAS Portal provides one of the most open frameworks in the Portal market, allowing it to access any information from any application or data source.

OracleAS Portal can be integrated with Oracle Project Management which provides project managers the visibility and control they need to deliver their projects successfully, and to operate more efficiently. Project management involves continuous decision-making to meet expected delivery and financial targets. With Oracle Project Management, all elements of project management are integrated and stored in one repository: plans, progress, issues, changes, documents, effort and cost, financial information, performance, and status reports. Project managers gain visibility and control of all project information via a simple to use, web-based interface and other productivity tools to proactively plan and forecast the project,
manage change and performance real-time, and make better decisions with less effort. These capabilities allow project managers to focus on meeting desired project outcomes rather than data management. Oracle Project Management is a product within the Oracle Projects family, and, more broadly, part of Oracle Ebusiness Suite, an integrated set of applications that are engineered to work together and transform your business to an e-business. Project managers can access all project information with an easy-to-use, web-based interface. From a list of projects, drill down into the Project Workbench for access to the complete project information. The project is highlighted on the Project Home page, which includes key information and short cuts to commonly used functions.

For Details please visit: http://www.oracle.com/applications/projects/index.html?intro.html

Further, OracleAS Portal allows integration with many providers who provide project management solutions. For more information please visit: http://portalstudio.oracle.com/servlet/page?_pageid=1639&_dad=ops&_schema=OPSTUDIO

Use keyword: Project.

149. What functions are supported in project areas?

The most common project-based collaboration functions include collaboration on documents, approval workflow, change notifications and calendaring. All these functionalities are offered by OracleAS Portal as out of the box portlets which can be integrated into a single portal page for collaboration.

150. Does your collaboration solution include searchable threaded discussions?

OracleAS Portal offers an out of box portlet for threaded discussions. Discussion Forum Portlet brings the capabilities of:

- Registering users with the Discussion Forum Portlet
- Creating new products
- Creating new Forums
- Posting new threads and messages
- Subscribing to forums and threads for email notification
- Searching messages
- Managing email subscriptions
- Adding privilege to users who can add/delete forum items like products, Forum and Threads.

151. Does your collaboration solution include document check-in, check-out, version control, and roll-back?

A complete document management and publishing environment is built right into the OracleAS Portal framework. Documents are stored in the Portal repository and managed through collaborative features like check-in/check-out, versioning, multi-step approvals, subscriptions, and fine-grained access control. Users can also manage links, with associated descriptions and metadata, to documents stored anywhere.

152. How does the solution’s project calendar synchronize with groupware calendaring?

Oracle Calendar, included with Oracle Collaboration Suite, provides web based calendaring and scheduling for enterprises and service providers. Oracle Calendar leverages components of OracleAS and the Oracle database to provide a scalable, reliable calendar solution. This approach provides users with full calendar functionality from any web browser and a single source of information for PDA synchronization.

Synchronization of project calendar schedule with groupware calendaring depends upon the project management application integrated into Oracle Portal.

153. Can community membership determine project membership?

Access to any particular resource by a user is verified by the access control list for the specific item being accessed. All users are stored in the Oracle Internet Directory, an LDAP3 compliant directory. Specific page groups / pages can be defined to be accessed by members of a specific group as defined by the administrator.
154. Does the project-based collaboration have a separate user experience or is it tightly integrated with the rest of the portal experience?

OracleAS Portal offers a consistent user experience throughout.

155. Can you access projects from personal and community portal pages?

Access to any particular resource by a user is verified by the access control list for the specific item being accessed. Access control lists (ACLs) are used throughout to manage user and group privileges on portal objects (pages, styles, items, portlets, etc.). Administrators can delegate ACL responsibility to object owners, who can specify the users/groups and their privileges to access, customize, or modify the object. In addition, an administrator can grant global privileges on all objects of a given type. Based upon the access privileges, items can be accessed from any portal page by a user.

156. Can a single project be embedded in multiple portal pages and applications?

Project management applications integrated with Oracle Portal can be embedded across multiple pages and applications.

157. Can users roll-up a view of project documents, tasks, or messages from projects from one place?

This feature will depend upon the project management application integrated with OracleAS Portal.

158. Can project documents be routed through workflow?

All documents in OracleAS Portal can be subjected to an approval process. OracleAS Portal comes with an out-of-box Workflow Notification Portlet. This web portlet uses Oracle workflow to display notification on portal interface. Actions like close and reassign can be taken on each notification. Customization of notification is based on status and sort order. Notification can have 2 status i.e. Open or Closed. Notification can be sorted based on Application name, Date and Subject.

159. Can documents in projects be published to the portal's knowledge directory?

Documents uploaded into the portal repository can be shared. It will depend upon the integration of the project management solution to share project documents with portal’s knowledge repository.

160. Does project collaboration include advanced search? Can I search across projects or limit the search to individual projects and project objects?

OracleAS uses Oracle Text to provide advanced searching capabilities against content stored in the Portal. Users can search by keyword, by metadata (attributes, categories, etc.), or both. Portlets are provided for both search submission and search results. These portlets can be customized to provide a variety of different search experiences, from basic keyword searches to advanced searches on a configurable list of content metadata. Oracle Text supports searches against over 100 document types, including HTML, XML, PDF, word-processing formats, spreadsheet formats, presentation formats, and other common business formats. OracleAS Portal also features built-in integration with Oracle UltraSearch. Oracle Ultra Search provides uniform search-and-locate capabilities over multiple repositories - multiple Portal repositories, Oracle databases, IMAP mail servers, HTML documents served up by a Web server, or files on disk. Ultra Search uses a "Crawler" to index documents; the documents stay in their own repositories, and the crawled information is used to build an index that stays within your firewall in a designated Oracle Database. Further, several search engine vendors, including Alta Vista, Autonomy, Inktomi, Open Text, and Verity are members of the Oracle Portal Partner Initiative and have integrated their products with OracleAS Portal.

161. How are searchable project objects indexed?

Please refer to the answer above.

162. Do project leaders manage and administer their own projects?

Access control lists (ACLs) are used throughout to manage user and group privileges on portal objects (pages, styles, items, portlets, etc.). Administrators can delegate ACL responsibility to object owners, like project leaders, who can specify the users/groups and their privileges to access, customize, or modify the object.
163. Can project managers create projects based on project templates?

This feature is determined by the project management application being integrated with Oracle Portal.

164. Can projects be deleted, or archived?

This feature is determined by the project management application being integrated with Oracle Portal.

165. Can a project leader customize roles within projects?

This is determined by the project management application being integrated with Oracle Portal. However, with requisite administrator rights any user can grant specific roles to users using the Access Control List (ACL) feature of Oracle Portal.

166. Can users view task lists as Gantt-charts?

This is determined by the project management application being integrated with Oracle Portal. OracleAS Portal does not provide out of box feature for the same, however, can be built using any of the portal developer kits.

167. Please list customers that use the proposed collaboration solution in production.

**Foundation Service: Automated Application Building**

168. Does your solution allow customers to easily build data-centric workgroup and community portal applications?

Yes, Oracle Portal allows customers to easily build data-centric workgroup and community portal applications. The workgroup and community information is stored in Oracle Internet Directory.

169. Can one create a new portlet by replicating an existing one? Does the application-building functionality include model applications or templates?

Yes, In Oracle Portal, portlets are customizable. Application developers can easily modify the portlets.

Yes, Oracle Portal provides templates for building applications.

170. Do workgroup and community composite applications integrate seamlessly into the overall Enterprise Web architecture? Do they provide centralized administration and control? How does one register new workgroup Enterprise Web applications in the portal itself?

Yes, Oracle Portal can integrate external applications and applications deployed in OracleAs server. Oracle Portal provides web based centralized administration. End user with minimal privileges can create page groups for portal application. New enterprise web applications can be integrated either as external or as partner applications.

171. Do your workgroup and community application development tools ensure that the applications will be stable and will scale to meet the widest portal needs?

172. Who has permission to build workgroup and community portal applications? Does a portal user who builds a workgroup or community application have to have other kinds of administrative privileges?

Administrator can create page groups and can give access to the community to build application on that pagegroup. A page group is simply a structure that Oracle Portal uses to group related portal objects such as pages, templates, styles, navigation pages, categories, perspectives, and more. The page group typically contains a collection of pages for organizing content. In order to perform operations like update and delete the portal user needs to have administrative privileges.
173. On what kinds of portal pages can these workgroup and community portal applications appear?

174. Can the portlet user interface be amended using a drag-and-drop, what-you-see-is-what-you-get user interface? Oracle Portal provides user friends user interface for building application. JPDK enables the Oracle to embed the drag and drop features.

**Developer Support**
175. Does your solution include an Integrated Development Environment (IDE)?
Oracle has Jdevloper IDE, using JPDK enables to extend the portal functions
For more information refer: [http://otn.oracle.com/tech/java/jdc_appdev.html](http://otn.oracle.com/tech/java/jdc_appdev.html)

176. Is a software development kit currently available for extending the system in this way? Yes, Oracle JDeveloper is an integrated development environment with end-to-end support for modeling, developing, debugging, optimizing, and deploying Java applications and Web services. Oracle JDeveloper 10g introduces a new approach to J2EE development with features that enable visual and declarative development.

177. What programming languages or development environments can be used to create such extensions? Have any customers or partners extended the system using this kit?
Oracle 9iAs supports Java, Perl, PL/SQL, or XML for development.

178. Describe your tools for allowing developers to create components that connect to search indexes, content sources, user repositories hosted on remote servers and networks, and that pull information about users from remote repositories.
Oracle portal has UltraSearch portlet, Using UltraSearch portlet can be configured to remote sources, contents

179. If customers can extend the portal to embed new tools or services, can such extensions use the portal’s scalability, security and personalization framework?
Oracle Portal is Scalable and High Available, capable of embed new tools and services, if the embedded tools is the part of oracle application server then it is scalable.

180. What products do you resell as part of your Enterprise Web solution?

**Languages and Standards**
181. What language and platform are the new tools and services written in? Is the interface to the core system proprietary?
The Oracle Portal solution is written in PL/SQL and Java. Changes to application code is not supported.

182. What functionality is exposed through a SOAP application-programming interface (API)?
Oracle Portal fully embraces the open standards of the Internet and has incorporated capabilities for deploying J2EE applications, exchanging and accessing data using HTTP, XML and SOAP that support a standards-based IT infrastructure. Oracle also provides API to access webservices through SOAP.

For more information refer:
http://otn.oracle.com/tech/webservices/documentation.html

183. Does the solution support programming interfaces accessible from both Java and .NET environments? Do you provide developer guidelines and support for both .NET and Java development environments? Do you support customers who extend the portal using both Java and .NET?

Oracle Application Server Supports .Net, however the application needs to be deployed in winCE environment. We do provide developer guidelines and support for both .NET and Java development environments.

For more information please refer
http://portalstudio.oracle.com/servlet/page?_pageid=350&_dad=ops&_schema=OPSTUDIO

How do you support the Web services for Remote Portlets (WSRP) and JSR-168 portlet standards?
Oracle Portal architecture perspective, WSRP fits where the current web provider SOAP interface sits. It defines the set of [SOAP] calls made from the portal to the remote portlet. Like our current web provider SOAP interface, it is designed for efficiency and scalability vs. usability. Again, like our current implementation, it expects developers interfaces to be layered on top of the SOAP service that implements this interface providing a simple, convenient, and usable portlet API to developers. In this sense portlet developers should never see [or need to learn] about WSRP as they will be insulated from it by another API.

JSR168 defines the portlet interface Java developers will use to build portlets. When used in a remote environment, it is the standard interface a Java based WSRP service exposes. It is the equivalent of the current Oracle9iAS Portal's web provider Java API. This means that of the two specifications developers should focus on JSR 168. It will become the standard Java programming interface for portlets. WSRP is more of a concern for Portal developers that want to support interoperable remote portlet development in various [language] runtimes.
For more information refer :
http://portalstudio.oracle.com/pls/ops/docs/FOLDER/COMMUNITY/PDK/articles/overview.wsrp.jsr168.standards.interview.html

184. Does your solution support WSDL (Web Services Description Language) interface definitions for portal objects?
Yes, Oracle As supports WSDL. Oracle Portal has portlet called Portlet Web services to invoke webservices.
For more information refer : http://otn.oracle.com/products/ias/daily/jul22.html

User interface
185. What end user navigation options come ready-made?
Oracle Portal fulfills all navigation related requirements by offering you key tools and objects for streamlining the creation and deployment of site-wide, as well as page-specific, navigation. Key tools and objects include templates, navigation pages, categories and perspectives, custom searches, and navigation-related items, such as Smart Links, Smart Text, and Page Paths.

186. How do I develop custom navigation schemes?

Navigation pages are special pages you create under the Navigation Pages node in the Portal Navigator.

Path: Page Groups > Navigation Examples

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Actions</th>
<th>Owner</th>
<th>Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pages</td>
<td>Pages</td>
<td>Create, Bulk Action</td>
<td>PORTAL</td>
<td>11-Oct-2002</td>
</tr>
<tr>
<td>Templates</td>
<td>Templates</td>
<td>Create</td>
<td>PORTAL</td>
<td>27-Sep-2002</td>
</tr>
<tr>
<td>Categories</td>
<td>Categories</td>
<td>Create, Bulk Action</td>
<td>PORTAL</td>
<td>26-Sep-2002</td>
</tr>
<tr>
<td>Navigation Pages</td>
<td>Navigation Pages</td>
<td>Create</td>
<td>PORTAL</td>
<td>11-Oct-2002</td>
</tr>
<tr>
<td>Perspectives</td>
<td>Perspectives</td>
<td>Create, Bulk Action</td>
<td>PORTAL</td>
<td>26-Sep-2002</td>
</tr>
<tr>
<td>Styles</td>
<td>Styles</td>
<td>Create</td>
<td>PORTAL</td>
<td>27-Sep-2002</td>
</tr>
<tr>
<td>Custom Types</td>
<td>Custom Types</td>
<td></td>
<td>PORTAL</td>
<td></td>
</tr>
</tbody>
</table>

187. Can I customize the user interface so that it looks just like my current intranet? How do I plug in custom user interface elements into the portal?

Yes, Oracle Portal can be customized to match the look and feel of any website. One can use existing templates and make necessary modifications or one can create their own templates using PDK.

188. Is the portal user interface logically separated from the application code, so that if I upgrade the portal application, any user interface customizations will be retained?

Costs & Deployment

189. Please provide an overview of your deployment methodology, including the resources involved, the costs and the time frames for a workgroup, departmental or enterprise-wide deployment.

190. Does the deployment methodology and cost include installation of the software?

191. Does a standard deployment include modifying the portal’s appearance to match the customer’s corporate identity?

192. Does the deployment include business consulting about developing the knowledge directory, and identifying the content and services to include in the Enterprise Web?

193. Does that deployment include training?

194. Does the deployment include initial configuration of the content and services in the solution?

195. Does the deployment include ongoing maintenance of the portal’s contents?

196. How are major stakeholders allowed to contribute to the design of an Enterprise Web deployment?

197. Please provide guidelines for estimating the number of customer personnel required to maintain the system and its contents on an ongoing basis. Please delineate the business or technical skills required of each resource.
198. Does your company or its partners offer training courses for technical administrators and business users that maintain the system? What is the length and costs of these courses, and how often are they offered?

199. Do standard users require training? If so, are such courses offered, and at what cost?

**Customer Support**

200. Describe any important new features being introduced within the next 90 days (planned releases). Will these be included and covered in the support and update agreements? Please describe your company’s best practices regarding delivery and implementation of product releases that coincide with customer implementation schedules.

201. Please describe your technical support offerings.

202. How many people are in your support organization?

203. Do you offer support round-the-clock, every day of the week? If not, when do you plan on offering that level of support?

204. Please describe your procedure for escalating support problems to a solution developer.

205. Does your solution include technical documentation for portal administrators?

206. Does your solution include user-friendly documentation for the business experts maintaining different sections of the portal?

207. Do you offer fixed-time, fixed-cost deployment services for the initial deployment?

208. Do you offer post-deployment on-site services? How do you charge for these services?

209. Do you offer a hosted service?

210. How do you charge for maintenance? Does maintenance include solution upgrades?
4.1 DELIVERY AND INSTALLATION
If an award is made by March 15, 2004, the Intranet Information Portal system must be installed, tested, accepted and in operation no later than June 1, 2004. Section 3.3 of this document establishes a basis for Project Administration from implementation through final acceptance (see section 3.3.1).

4.1.1 Time Compliance

___ We can meet delivery, installation, acceptance testing and operation date as specified.

___ We CANNOT meet the delivery, installation, acceptance testing and operation date as specified, but offer the following (use separate sheet if necessary – schedule must include specific time line, including acceptance testing):

____________________________________________________________________________________
____________________________________________________________________________________
____________________________________________________________________________________

____________________________________
Authorized Signature
RESPONSE: Are these items included in your proposal? Respond Yes, No, or NA – Explain No or NA in Respondent Comments

___ ANY EXCEPTION TO THE TERMS AND CONDITIONS AND SPECIFICATIONS HAVE BEEN NOTED and IT IS UNDERSTOOD THAT SUCH EXCEPTIONS MAY RESULT IN BY BID BEING DEEMED NONCONFORMING.

___ All requested documents requested have been included (for example, the Bid Bond or certified check.)

___ Reference list is attached.

___ Required performance bond and proof of insurance will be provided, if my firm receives the award.

___ The undersigned, RESPONDENT having examined the proposal terms and conditions and specifications, hereby proposes and agrees to perform, the services required within the time stipulated, all work required to be performed, and to provide labor materials, tools, expendable equipment and insurance necessary to complete, in a workmanlike manner, all of the work required for the City to make use of its services in strict conformity with the specifications and addenda.

Signature below certifies that I have carefully reviewed the City’s terms, conditions, and specifications on this Request For Proposal and have clearly indicated in writing any exceptions my company is making to these terms, conditions, and specifications and am authorized to offer such services. Respondent agrees to honor its proposal for a period of 120 days from the proposal due date.

Therefore, I/we, the undersigned, hereby agree to provide the services and/or materials as specified if an award is made to my firm without any additional charges, terms, and/or conditions.

COMPANY NAME: *
STREET/P. O. BOX:
CITY, STATE, AND ZIP CODE:
DATE: ______________ TELEPHONE: ______________ FAX: ______________
AUTHORIZED SIGNATURE:

PRINTED NAME OF SIGNER: ________________________________________________
TITLE OF SIGNER: ________________________________________________________

* NOTE: If the RESPONDENT is a corporation, the legal name of the corporation shall be set forth above together with the signature of authorized officer or agents. If RESPONDENT is a partnership, the true name of the firm shall be set forth with the signature of the partners authorized to sign contracts on behalf of the partnership. If RESPONDENT is an individual, his signature shall be placed above.

Specific questions concerning your proposal should be directed to:
Telephone Number: ______________________
ATTACHMENT B  
SPECIMEN CONTRACT FOR SERVICES

The Respondent selected to do business with the City of Ann Arbor will be required to execute the City’s standard contract. The City will not entertain requests to revise, amend, or change the language of the standard contract except where necessary to incorporate the scope of services and compensation for same as awarded. Proposal submitters must base their proposal on the assumption that, if selected, they will execute the City’s standard Agreement.

AGREEMENT BETWEEN

AND

CITY OF ANN ARBOR

FOR

INTRANET INFORMATION PORTAL SYSTEM

The City of Ann Arbor, a Michigan municipal corporation, having its offices at 100 North Fifth Avenue, Ann Arbor, Michigan 48107 ("CITY") and, [Name of Contractor], [City, State and Zip Code of Contractor], ("CONTRACTOR"), agree as follows:

The Contractor agrees to provide services to the City under the following terms and conditions:

I. DEFINITIONS

A. Administering Department means Information Technology Services Department

B. Contract Administrator means Steven Hampton, Information Technology Services Director

C. Project means Intranet Information Portal system, RFP No. 577

D. Project Manager means ITSD Project Manager

Note: Additional definitions may be necessary based on the selected Proposal.

II. DURATION

This agreement shall become effective on [Insert effective date], and shall remain in effect until satisfactory performance of all services unless terminated for breach or as provided in this agreement.

III. SERVICES

A. General Scope: The Contractor agrees to provide services as described in RFP 577, Section 3 Scope of Services and its proposal dated, ______, which are incorporated here by reference and more specifically described in Exhibit A.

B. Change Orders: The City may at any time, by giving proper notice may issue change orders within the general scope of the work including, but not limited to, revisions of, additions to, or deletions of portions of the work, or changes in method of shipment or packaging and place of delivery. A change order shall not be binding on the City unless signed by the City Project Manager.

If the changes add to or deduct from the extent of the services, the contract sum shall be adjusted accordingly. All such changes shall be executed under the conditions of the original agreement. A copy of
the authorized Change Order request shall be mailed to the Contractor as required in section XV. NOTICES of this agreement.

C. Quality of Services: The Contractor’s standard of service under this agreement shall be of the level of quality performed by experts regularly rendering this type of service. Determination of acceptable quality shall be made solely by the Contract Administrator with advice from the Project Manager.

All equipment provided under this Agreement shall be new and in good working condition.

All tasks, deliverables, goods, and other related work provided by the contractor is subject to the City’s review, testing, and approval. In no event shall any invoice be submitted as to any task, deliverables, goods, service, or other work without the verbal or written approval of the City Project Manager.

D. Compliance with Applicable Law: The Contractor shall perform its services under this agreement in compliance with all applicable laws, ordinances and regulations.

E. Location: The Contractor shall provide services to the City at location specified in the Request for Proposal.

F. Notice of Delay: The Contractor agrees to notify the Project Manager promptly of any factor, occurrence, or event coming to its attention that may affect The Contractor’s ability to meet the requirements of the Agreement, or that is likely to occasion any material delay in delivery of deliverables. The written notice shall be given in the event of any loss or reassignment of key employees, threat of strike, or major equipment failure. In situations where an extension of time in contract completion is appropriate under this or any other section of the contract, the Contractor understands and agrees that the only available adjustment for events that cause any delays in contract completion shall be extension of the required time for contract completion and that there shall be no adjustments in the money due the Contractor on account of the delay.

G. Complete Service/Products: The Contractor is required to:

1. Furnish all tools, equipment, supplies, supervision, insurance, transportation, and other accessories, services, and facilities.
2. Furnish all materials, supplies, and equipment specified and required to be incorporated in and form a permanent part of the completed work.
3. Provide and perform all necessary labor.
4. Execute and complete all specified work with due diligence, in accordance with good technical practice and the requirements, stipulations, provisions, and conditions of this request for proposal and the resultant contract.

H. Safety: All work provided shall comply with all Federal, State, and other laws relative thereto. The Contractor further agrees that the work shall comply with all applicable Federal and State Occupational Safety and Health laws, Standards and Regulations, and that the Contractor will indemnify and hold the City harmless for any failure to conform. Throughout all phases of construction the Contractor shall keep the work site clean and free from rubbish and debris. Materials and equipment shall be removed from the site as soon as they are no longer necessary. The Contractor shall report, in writing, to the City Project Manager all accidents and injuries occurring on this project including name of involved person(s), date, time, location, and nature of occurrence.

I. Permits And Licenses: The Contractor, at its sole expense, shall obtain and maintain during the term of this Agreement, all appropriate permits, licenses, and certificates that may be required in connection with the performance of installation services under this Agreement.

At completion of this Project any and all licenses required for the operation of the System by the City shall be granted or assigned to the City.

J. Inspection of Work: The City shall have the right at all times to inspect any and all tasks, deliverables, goods, services, and other work provided by or on behalf of the Contractor on a non-interference basis. The purpose of such inspection will be to verify project progress as reported by the Contractor, and to ensure that work products are in conformance with designated specifications and requirements. The Contractor
shall provide full cooperation to any inspector assigned by the City to permit him/her to determine the Contractor's conformity with these specifications and the adequacy of the services being contractually provided.

K. Deviations from Specifications: Documented deviations from designated specifications or the Contractor will immediately correct contract provisions. If any services performed hereunder are not in conformity with the specifications and requirements of this contract, the City shall have the right to require the Contractor to perform the services in conformity with said specifications and requirements at no additional increase in total contract amount.

When the services to be performed are of such a nature that the correction of the deficiency is not feasible, the City shall have the right to:

1. Require the Respondent to immediately take all necessary steps to insure future performance of the services in conformity with requirements of the contract.

2. Reduce the contract price to reflect the reduced value of the services performed.

In the event the Respondent fails to perform the services promptly or to take necessary steps to insure future performance of the service in conformity with the specifications and requirements of the contract, the City shall have the right to either:

1. By contract or to otherwise have the services performed in conformity with the contract specifications and charge to the Respondent any cost occasioned to the City that is directly related to the performance of such services; or

2. Terminate this contract for default as provided in the Termination Clause.

The Contractor’s project representative will give adequate advanced notice to the City Project Manager when various phases of the project are complete and ready for testing. The City Project Manager or designated inspector will then inspect the completed portions of the system. Final system inspection will be conducted in a similar manner.

L. The City retains the right of final approval over all Contractor-supplied personnel and retains the right to request any changes in any positions, should it become necessary. A request for a change must be satisfied within thirty (30) days of receipt of written notification from the City to the Contractor.

M. Completion of Work: The performance or acceptance of services furnished by the Contractor shall not relieve the Contractor from the obligation to correct any defective, inaccurate, or incomplete work subsequently discovered, without additional cost to City within the one (1) year warranty period.

N. Shipping of Equipment and Materials: All equipment and materials to be delivered to the City will be delivered F.O.B. destination, freight prepaid by the Contractor.

O. Delays: Neither the Contractor nor the City shall be responsible for delays or lack of performance resulting from acts or events beyond the reasonable control of the party or parties. Such acts shall include, but not be limited to, acts of God; fire; strike; compliance with laws or regulations; riots; acts of war; or any other conditions beyond the reasonable control of the party or parties.

Periods of performance may be extended if the facts as to the causes of delay justify such extension in the opinion of City.

V. DELIVERABLES

A. Delivery and Acceptance: Contractor shall deliver all Deliverables, as specified in the Scope of Services. The Contractor shall memorialize the delivery in a delivery confirmation that sets forth the nature and condition of the Deliverables and the date of delivery.

B. Acceptance Testing: Acceptance testing shall take place as agreed to by the Contractor and the City in the Acceptance Testing Plan, which is incorporated herein. Upon completion of the initial testing, the City shall issue to the Contractor a notice of tentative acceptance or rejection of the deliverables. In the event of
rejection, the City shall give its reasons for rejection to the Contractor in reasonable detail. The Contractor shall use all reasonable effort to correct any deficiencies or nonconformities and resubmit the rejected items as promptly as possible.

C. Final System Acceptance: The City will accept the System and all related deliverables and make final payment when all of the following have been completed:

1. All tests required by the Contract have been successfully completed and documented.
2. All quantitative and qualitative performance standards and requirements as described in the Detailed System Design Document and elsewhere in the agreement have been met.
3. Documentation delivery requirements have been satisfied.
4. All required training has been provided.

Note: Acceptance Testing language may need to be modified based on the Selected Respondent’s Submitted and City-approved Acceptance Testing Plan.

VI. RELATIONSHIP OF PARTIES

A. The parties to this agreement agree that it is not a contract of employment but is a contract to accomplish a specific result. The Contractor is an independent contractor performing services for the City. Nothing contained in this agreement shall be deemed to constitute any other relationship between the City and the Contractor. The Contractor will have sole responsibility for all salaries and benefits for its employees. This shall include but not be limited to employees’ wages, workers compensation insurance, unemployment compensation, bonuses, retirement, taxes, and shall hold the City harmless with respect thereto.

B. Contractor certifies that it has no personal or financial interest in the project other than the fee it is to receive under this agreement. The Contractor further certifies that it shall not acquire any such interest, direct or indirect, which would conflict in any manner with the performance of services under this agreement. Further the Contractor agrees and certifies that it does not and will not employ or engage any person with a personal or financial interest in this agreement.

C. Contractor does not have any authority to execute any contract or agreement on behalf of the City, and is not granted any authority to assume or create any obligation or liability on the City’s behalf, or to bind the City in any way.

D. Contractor certifies that it is not, and shall not become, overdue or in default to the City for any contract, debt, or any other obligation to the City including real or personal property taxes. City shall have the right to set off any such debt against compensation awarded for services under this agreement.

E. Prime Contractor Responsibility: The Contractor shall cause all appropriate provisions of its proposal and contract with the City to be inserted in all ensuing subcontracts to ensure fulfillment of all contractual provisions by subcontractors. The City will consider the prime Contractor to be solely responsible in all contractual matters, including payment of any and all charges resulting from such subcontractor arrangements.

F. Subcontractors: The subcontracting of any or all of the work to be done will in no way relieve contractor of any part of its responsibilities under this Contract.

All persons engaged in the work, including subcontractors, shall be considered as employee of the Contractor. The Contractor shall be held responsible for their work. The City will deal directly with and make all payments to the Contractor. The subcontracting of any or all of the work to be done will in no way relieve the Contractor of any part of its responsibilities under this Contract. The contract between the City and the Contractor is not for the benefit of any other person or entity.

Note: Subparagraphs E and F may be deleted if no subcontracting will be done as part of this contract.

G. Ownership of Work: Upon completion or termination of this agreement, all deliverables prepared by the Contractor in performance of services for this agreements shall become the property of, and be delivered to
the City. Prior to completion of the contracted services the City shall have a recognized proprietary interest in the work product of the Contractor.

H. Patents and Copyrights: The Contractor shall indemnify, defend, and hold harmless the City, its officers, and employees from all liabilities, claims, damages, costs, or expenses, including, but not limited to, attorney’s fees incurred or imposed upon them or any of them, for any alleged infringement of patent rights or copyrights of any person or persons in consequence of the use by City, its officers, employees, agents, and other duly authorized representatives of articles, processes, and/or software supplied to City by Contractor under this Agreement.

I. Taxpayer Identification Number: The Contractor shall provide the City with a complete Request for Taxpayer Identification Number and Certification, Form V-9 (Rev. 12-87), as issued by the Internal Revenue Service.

VII. COMPENSATION OF CONTRACTOR

Note: Fee schedule language may be adjusted based on the selected Respondent’s Cost Proposal and the services requested by the City in response to the Respondent’s submission and any alternates or additions thereto.

A. The total maximum fee to be paid the Contractor for the deliverables shall not exceed $__________. This is a fixed price contract for the Project. This price includes charges for all Contractor personnel associated with the project and any other expenses the Contractor expects to incur.

B. The Contractor shall keep complete records of time spent and materials used in providing the contract services so that the Administering Department may verify invoices submitted by the Contractor. The records shall be made available to the City upon request. Each invoice submitted by the Contractor shall include and describe the Deliverable item(s) as described in this agreement for which payment is claimed.

C. All invoices submitted by the Contractor shall have the approval of the City Project Manager prior to any payment thereof. In no event shall the City be liable or responsible for any payment prior to such approval.

D. In as much as the City will be buying the system as specified, if the installed system does not meet the specified performance criteria, it is the Contractor’s responsibility and sole financial liability to modify the system installed by the Contractor to meet the performance criteria.

E. Sales Taxes: Under State law the City is exempt from the assessment of State Sales Tax on its direct purchases. Contractors who acquire materials, equipment, supplies, etc. for incorporation in City projects are not likewise exempt. State Law shall prevail. No extra payment will be allowed under this Contract for failure of the Contractor to make proper allowance for taxes it must pay.

F. It is understood and agreed between the parties that the compensation stated above is inclusive of any and all remuneration to which the Contractor may be entitled.

VIII. INSURANCE / INDEMNIFICATION

A. The Contractor agrees to procure and maintain in effect insurance policies in the amount and with the type of coverage shown below:

1. Errors and Omission insurance protecting the Contractor and its employees in an amount not less than $1,000,000 per claim and aggregate.

2. Worker’s Compensation Insurance in accordance with all applicable state and federal statutes. Further, Employers Liability Coverage shall be obtained in the following minimum amounts:

   Bodily Injury by Accident - $500,000 each accident
   Bodily Injury by Disease - $500,000 each employee
   Bodily Injury by Disease - $500,000 each policy limit
3. Commercial General Liability Insurance equivalent to, as a minimum, Insurance Services Office form CG 00 01 07 98. The City of Ann Arbor shall be an additional insured. Further, the following minimum limits of liability are required:

- $1,000,000 Each occurrence as respect Bodily Injury Liability or Property Damage Liability, or both combined.
- $2,000,000 Per Project General Aggregate
- $1,000,000 Personal and Advertising Injury

4. Motor Vehicle Liability Insurance, including Michigan No-Fault Coverages, equivalent to, as a minimum, Insurance Services Office form CA 00 01 07 97. The City of Ann Arbor shall be an additional insured. There shall be no added exclusions or limiting endorsements. Coverage shall include all owned vehicles, all non-owned vehicles and all hired vehicles. Further, the limits of liability shall be $500,000 for each occurrence as respects Bodily Injury Liability or Property Damage Liability, or both combined.

5. Umbrella/Excess Liability Insurance shall be provided to apply excess of the Commercial General Liability, Employers Liability and the Motor Vehicle coverage enumerated above, for each occurrence and for aggregate in the amount of $1,000,000.

B. Insurance required under V.A.3 and V.A.4 of this Contract shall be considered primary as respects any other valid or collectible insurance that the City may possess, including any self-insured retentions the City may have; and any other insurance the City does possess shall be considered excess insurance only and shall not be required to contribute with this insurance. Further, the Contractor agrees to waive any right of recovery by its insurer against the City.

C. In the case of all Contracts involving on-site work, the Consultant shall provide to the City before the commencement of any work under this Contract documentation demonstrating it has obtained the above-mentioned policies. Documentation must provide and demonstrate an unconditional 30-day written notice of cancellation in favor of the City of Ann Arbor. Further, the documentation must explicitly state the following: (a) the policy number; name of insurance company; name and address of the agent or authorized representative; name and address of insured; project name; policy expiration date; and specific coverage amounts; (b) any deductibles or self-insured retentions which shall be approved by the City, in its sole discretion; (c) that the policy conforms to the requirements specified. An original certificate of insurance may be provided as an initial indication of the required insurance, provided that no later than 21 calendar days after commencement of any work the Consultant supplies a copy of the endorsements required on the policies. Upon request, the Consultant shall provide within 30 days a copy of the policy (ies) to the City. If any of the above coverages expire by their terms during the term of this Contract, the Consultant shall deliver proof of renewal and/or new policies to the Administering Department at least ten days prior to the expiration date.

D. Any insurance provider of Consultant shall be admitted and authorized to do business in the State of Michigan and shall carry and maintain a minimum rating assigned by A.M. Best & Company’s Key Rating Guide of “A-” Overall and a minimum Financial Size Category of “V”. Insurance policies and certificates issued by non-admitted insurance companies are not acceptable unless approved in writing by the City.

E. To the fullest extent permitted by law, the Contractor shall indemnify, defend and hold the City, its officers, employees and agents harmless from all suits, claims, judgments and expenses (including attorney's fees) resulting or alleged to result from any services, acts or omissions by the Contractor or its employees and agents in performing this agreement.

IX. COMPLIANCE REQUIREMENTS

A. Nondiscrimination. The Consultant agrees to comply with the nondiscrimination provisions of Chapter 112 of the Ann Arbor City Code and to take affirmative action to assure that applicants are employed and that employees are treated during employment in a manner which provides equal employment opportunity and tends to eliminate any inequality based upon race, national origin or sex. The Consultant agrees to comply with the provisions of Section 9:161 of Chapter 112 of the Ann Arbor City Code, Exhibit B.
B. Living Wage. The Consultant agrees to comply with living wage provisions of Chapter 23 of the Ann Arbor City Code and, if a “covered employer” as defined therein to pay those employees providing Services to the City under this agreement a “living wage,” as defined in Chapter 23 of the Ann Arbor City Code; and, if requested by the City, provide documentation to verify compliance. The Consultant agrees to comply with the provisions of Section 1:815 of Chapter 23 of the Ann Arbor City Code, Exhibit C.

X. WARRANTIES BY CONTRACTOR

A. The Contractor warrants that the quality of its performance under this agreement shall conform to the level of quality performed by experts regularly rendering this type of service.

B. The Contractor warrants that it has all the skills and experience necessary to perform the services it is to provide pursuant to this agreement. The Contractor may rely upon the accuracy of reports and information provided to it by the City except when defects should have been apparent to a reasonably competent contractor or when it has actual notice of any defects in the reports and information.

C. The Contractor warrants that it has available, or will engage, at its own expense, sufficiently trained employees to provide the services specified in this agreement.

D. The Contractor warrants that all Deliverables are free from viruses.

E. The Contractor warrants that all computer and documentation deliverables, without any alteration or modifications, are compatible with all dates for a period of fifty (50) years from the date of installation. This shall include, but is not limited to: data structures (databases, data files, etc.) that provide 4-digit date century; stored data that contain date century recognition, including but not limited to, data stored in databases and hardware device internal system dates; calculations and program logic (e.g. sort algorithms, calendar generation, event recognition, and all processing actions that use or produce date values) that accommodates same century and multi-century formulas and date values; interfaces that supply data to and receive data from other systems or organizations that prevent non-compliant dates and data from entering any City system; user interfaces (i.e., screens, reports, etc.) that accurately show 4-digit years; and assurance that the year 2000 shall be correctly treated as a leap year within all calculation and calendar logic.

F. Hardware and Materials Warranty: Contractor warrants, for a period of one (1) year from the date of Final Acceptance of the System all hardware, materials and supplies used in the System that meets the needs of and is accepted by the City. This will include all original specified hardware, plus any additional hardware, materials and supplies needed to pass all tests required by the City before system acceptance sign off. The Contractor will be responsible for advising all component manufacturers of this warranty and take appropriate action necessary to bring individual component warranties into compliance with the one (1) year warranty required by the City.

Defective components, materials and/or supplies will be returned or replaced by the Contractor at no cost to the City. No additional labor or material costs of any kind will be granted to correct component failure during the installation phase and the one (1) year warranty time period.

The Hardware warranty shall commence upon final acceptance of the system.

G. Software Warranty: All software installed by the Contractor shall be warranted to be free from defects in material and workmanship for a period of one (1) year from the date of Final Acceptance of the System. The Contractor warrants that the software shall perform in accordance with and strictly comply with specifications, requirements, standards and representations set forth in this agreement and the detailed system design. In the event that the software does not perform as required by the specifications, the Contractor shall promptly correct any such deviations. The correction of any such deviation shall be at no cost to the City and qualified personnel shall perform the work performed hereunder in a timely and professional manner.

The Software Warranty shall commence upon Final Acceptance of the System.

XI. TERMINATION OF AGREEMENT; RIGHTS ON TERMINATION
A. This agreement may be terminated by either party in the case of a breach of this agreement by the other party, if the breaching party has not corrected the breach within 15 days after notice of termination is given in conformance with the terms of this agreement.

B. The City shall have the privilege, with or without cause, to cancel and annul this agreement at any time on 30 days written notice to the Contractor in accordance with the notice provisions contained in this agreement.

C. If the City chooses to terminate this contract, the City shall be liable to the Contractor only for work done and materials delivered by the Contractor up to and including the date of termination of this contract unless termination is for cause, in which case the Contractor need be compensated only to the extent required by law.

D. If the Contractor should be adjudged bankrupt, or should the Contractor make a general assignment for the benefit of its creditors, or if a receiver should be appointed due to its insolvency, the City may terminate this agreement. Termination under this subparagraph shall be deemed to be for cause.

E. If the Contractor should persistently or repeatedly refuse or fail, except in cases for which an extension of time is provided, to provide enough properly skilled workers or proper materials, or persistently disregard laws and ordinances, or not proceed with work under this Contract or otherwise be guilty of a substantial violation of any provision of this Agreement, then the City may terminate this agreement. Termination under this subparagraph shall be deemed to be for cause.

F. Prior to termination of this agreement pursuant to the provisions of Section E. of this Article, the City shall give the Contractor written notice of termination. Upon receipt of such termination notice, the Contractor shall be allowed thirty (30) calendar days to cure such deficiencies. If such deficiencies are not cured within such thirty (30) days, the Agreement shall terminate on the expiration of thirty (30) days from the date on which the notice of termination was given.

G. The City may terminate this contract if it is found that gratuities in the form of entertainment, gifts, or otherwise are/were offered or given by the Contractor or any agent or representative of the Contractor, to any office or employee of the City with a view toward securing a contract or securing favorable treatment with respect to awarding or amending, or the making of any determinations with respect to the performing of such contract. In the event of such termination, the City shall be entitled to pursue the same remedies against contractor as it would pursue in the event of default by Contractor.

H. If the Contractor fails to make delivery or complete installation in accordance with this contract, the City may consider the Contractor to be in default unless such failure has been caused by the conditions as set forth in Article III. K. of this agreement.

The City shall give the Contractor written notice of such default and the Contractor shall have thirty (30) days to cure said default. If the Contractor fails to cure said default, the City may terminate any unfilled portion of this contract and/or complete the system through a third party. The Contractor shall be responsible for any amount in excess of the contract price incurred by the City in completing the system to meet this Agreement.

XII. CONFIDENTIAL INFORMATION

A. The Contractor and its officers and employees shall be subject to the City’s security measures and applicable state and federal statutes and regulations. The Contractor agrees to abide by all such security measures.

B. The Contractor shall not publish or disseminate any commercial advertisements, press releases, or feature articles using the name of the City or Ann Arbor without the prior oral or written consent of the City Administrator.

XIII. OBLIGATIONS OF THE CITY

A. The City agrees to give the Contractor access to staff and the City owned properties as required to perform the necessary services under the agreement.

B. The City shall notify the Contractor of any defects in the services of which the City has actual notice.
XIV. ASSIGNMENT

A. The Contractor shall not subcontract or assign any portion of the services without prior written consent to such action by the City.

B. The Contractor shall retain the right to pledge payment(s) due and payable under the agreement to third parties.

C. The Contractor agrees to require all persons performing any portion of the services under this Agreement to be bound by all terms and provisions of the Agreement, and, in particular, will specifically require all such persons to become familiar with Article XII. CONFIDENTIAL INFORMATION.

XV. NOTICES

All notices and submissions required under the agreement shall be by personal delivery or by first-class mail, postage prepaid, to the address stated in this agreement or such other address as either party may designate by prior written notice to the other. Notice shall be considered delivered under this agreement when personally delivered to the Project Manager or placed in the U.S. mail, postage prepaid to the Administering Department, care of the Project Manager. Changes may be made in the names and addresses of persons to whom notices are to be given by giving notice in the manner described above.

Notices sent by mail shall be addressed as follows:

To City: City of Ann Arbor
Information Technology Services Department
Steven Hampton, Information Technology Services Director
100 N. Fifth Ave., P.O. Box 8647
Ann Arbor, MI 48107-8647

To Contractor:

 XVI. EXTENT OF AGREEMENT

This agreement, including any exhibits and attachments thereto, represents the entire understanding between the City and the Contractor and it supersedes all prior representations or agreements whether written or oral. Neither party has relied on any prior representations in entering into this agreement.

This agreement may be altered, amended or modified only by written amendment signed by the Contractor and the City.

The City’s waiver of any term, condition, breach, or default of this Contract shall not be considered to be a waiver of any other term, condition, default, or breach, nor of a subsequent breach of the one waived. Failure of the City to enforce at any time, or from time to time, any provision of this agreement shall not be construed as a waiver thereof.

XVII. OWNERSHIP/LICENSING OF DELIVERABLES

A. Software Licensing: The Contractor hereby grants to the City, and the City hereby accepts, subject to the terms and conditions of this agreement, a non-exclusive, non-transferable, site license to use the application software provided under the terms of this agreement.

B. Patent License: The Contractor hereby grants to the City, its successors, and assigns, the royalty-free, worldwide, nonexclusive right and license under any patents owned by the Contractor, or with respect to which the Contractor has a right to grant such rights and licenses, to the extent required by City to exploit the deliverables and exercise its full rights in the deliverables, including (without limitation) the right to make, use, and sell products and services based on or incorporating the deliverables.

XVIII. PRIME CONTRACTOR RESPONSIBILITY

The Contractor shall cause all appropriate provisions of its contract with the City to be inserted in all ensuing subcontracts to ensure fulfillment of all contractual provisions by subcontractors. The City will consider the prime Contractor to be solely responsible in all
contractual matters, including payment of any and all charges resulting from such subcontractor arrangements.

*Note: provision may be deleted if no subcontracting will be done under this contract.*

XIX. SEVERABILITY OF PROVISIONS

Whenever possible, each provision of this agreement will be interpreted in a manner as to be effective and valid under applicable law. However, if any provision of this agreement or the application of any provision to any party or circumstance will be prohibited by or invalid under applicable law, that provision will be ineffective to the extent of the prohibition or invalidity without invalidating the remainder of the provisions of this agreement or the application of the provision to other parties or other circumstances.

XX. CHOICE OF LAW

This agreement shall be construed, governed, and enforced in accordance with the laws of the State of Michigan. By executing this agreement, the Contractor and the City agree to venue in a court of appropriate jurisdiction sitting within Washtenaw County for purposes of any action arising under this agreement. Nothing in this agreement is intended to diminish the obligations the Contractor may have to comply with its obligations under otherwise applicable federal law.

FOR CONTRACTOR

By ______________________
Its: ______________________

FOR THE CITY OF ANN ARBOR

By ______________________
John Hieftje, Mayor

By ______________________
Kathleen Root, City Clerk

Approved as to substance

By ______________________
Roger W. Fraser, City Administrator

Approved as to form and content

By ______________________
Stephen Postema, City Attorney
Exhibits

Any exhibit referenced in the specimen contract concerning scope of work or rate of compensation will be delivered based on the RFP and the selected respondent’s proposal as accepted by the City.
Exhibit B of Attachment B
FAIR EMPLOYMENT PRACTICE

The contractor, its agents or sub-contractors, shall comply with all requirements of Chapter 112 of Title IX of the Code of the City of Ann Arbor and in particular the following excerpts there from:

9:161 NONDISCRIMINATION BY CITY CONTRACTORS

(1) All contractors proposing to do business with the City of Ann Arbor shall satisfy the nondiscrimination administrative policy adopted by the City Administrator in accordance with the guidelines of this section. All contractors shall receive approval from the Director prior to entering into a contract with the City, unless specifically exempted by administrative policy. All City contractors shall take affirmative action to insure that applicants are employed and that employees are treated during employment in a manner, which provides equal employment opportunity and tends to eliminate inequality based upon race, national origin or sex.

(2) Each prospective contractor shall submit to the City data showing current total employment by occupational category, sex and minority group. If, after verifying this data, the Director concludes that it indicates total minority and female employment commensurate with their availability within the contractor's labor recruitment area, i.e., the area from which the contractor can reasonably be expected to recruit, said contractor shall be accepted by the Director as having fulfilled affirmative action requirements for a period of one year at which time the Director shall conduct another review. Other contractors shall develop an affirmative action program in conjunction with the Director. Said program shall include specific goals and timetables for the hiring and promotion of minorities and females. Said goals shall reflect the availability of minorities and females within the contractor's labor recruitment area. In the case of construction contractors, the Director shall use for employment verification the labor recruitment area of the Ann Arbor-Ypsilanti standard metropolitan statistical area. Construction contractors determined to be in compliance shall be accepted by the Director as having fulfilled affirmative action requirements for a period of six (6) months at which time the Director shall conduct another review.

(3) In hiring for construction projects, contractors shall make good faith efforts to employ local persons, so as to enhance the local economy.

(4) All contracts shall include provisions through which the contractor agrees, in addition to any other applicable Federal or State labor laws:

(a) To set goals, in conference with the Human Resources Director, for each job category or division of the work force used in the completion of the City work;

(b) To provide periodic reports concerning the progress the contractor has made in meeting the affirmative action goals it has agreed to;

(c) To permit the Director access to all books, records and accounts pertaining to its employment practices for the purpose of determining compliance with the affirmative action requirements.

(5) The Director shall monitor the compliance of each contractor with the nondiscrimination provisions of each contract. The Director shall develop procedures and regulations consistent with the administrative policy adopted by the City Administrator for notice and enforcement of non-compliance. Such procedures and regulations shall include a provision for the posting of contractors not in compliance.

(6) All City contracts shall provide further that breach of the obligation not to discriminate shall be a material breach of the contract for which the City shall be entitled, at its option, to do any or all of the following:

(a) To cancel, terminate, or suspend the contract in whole or part and/or refuse to make any required periodic payments under the contract;

(b) Declare the contractor ineligible for the award of any future contracts with the City for a specified length of time;

(c) To recover liquidated damages of a specified sum, said sum to be that percentage of the labor expenditure for the time period involved which would have accrued to minority group members had the affirmative action not been breached;

(d) Impose for each day of non-compliance, liquidated damages of a specified sum, based upon the following schedule:
<table>
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<tr>
<th>Contract Amount</th>
<th>Assessed Damages Per Day of Non-Compliance</th>
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<tr>
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<td>5,000,000 - and above</td>
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(e) In addition the contractor shall be liable for any costs or expenses incurred by the City of Ann Arbor in obtaining from other sources the work and services to be rendered or performed or the goods or properties to be furnished or delivered to the City under this contract.
DEPARTMENT OF HUMAN RESOURCES  
CITY OF ANN ARBOR, MICHIGAN  
CONTRACT COMPLIANCE FORM  

BID NO. ___________  
DATE ___________

NAME OF COMPANY  

NAME & TITLE OF PERSON COMPLETING FORM  

ADDRESS __________________________________________ CITY ________ STATE ________ ZIP ________  
PHONE NO. (____) ___________ FAX NO. (____) ___________ COUNTY __________________  
PROJECT NAME  

AND/OR  

PURCHASE ORDER ITEM  

NAME OF PRESIDENT  

PLEASE RETURN TO: HUMAN RESOURCES DEPT. - HUMAN RIGHTS DIVISION, BOX 8647, ANN ARBOR, MI 48107  
(313) 994-2803  FAX (313) 994-1765  

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<td>Craftpersons (specify)</td>
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<td>Operatives (semi-skilled)</td>
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<td>Laborers (unskilled)</td>
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<td>Apprentices (specify)</td>
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<tr>
<td>Trainees</td>
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**TOTAL**

% Employee turnover last 12 months ____________________________  
% Increased in 12 months ____________________________  
% Decreased in 12 months ____________________________  
Location of project(s) ____________________________  
Length of contract ____________________________  
Name of City of Ann Arbor Department Letting Bid: ____________________________  
Expected Length of Actual On-site work ____________________________  

B - Black  H - Hispanic  A - American Indian  AP - Asian or Pacific Islander  O - Other

White Copy: Submitted with bid should identify all present employees.  
Pink Copy: Submitted with bid should identify only those employees that will do on-site work.  

K-12 Revised 4/93
Exhibit C of Attachment B
Living Wage Ordinance Excerpts

The Consultant, its agents or sub-contractors, shall comply with all requirements of Chapter 23 of Title I of the Code of the City of Ann Arbor and in particular the following excerpts therefrom:

1:813. Definitions.

For purposes of this Chapter, the following definitions shall apply:

1. “Contractor/Respondent” is a person or entity that has a contract with the City primarily for the furnishing of services where the total amount of the contract or contracts with the City exceeds $10,000 for any 12-month period. "Contractor/Respondent" does not include a person or entity that has a contract with the City primarily for the purchase of goods or property, or for the lease of goods or property to or from the City.

2. "Covered Employee" means a person employed by a covered employer to perform services which are covered or funded by the contract with or grant from the City; provided, however, that persons who are employed pursuant to federal, state or local laws relating to prevailing wages shall be exempt from this Chapter.

3. "Covered Employer" means a contractor/Respondent or grantee that has not been granted an exemption from this Chapter pursuant to Section 1:817.

4. "Employee" means an individual who provides personal services performed for wages under any contract calling for the performance of personal services, whether written or oral, express or implied. The term "employee" does not include any individual who volunteers to perform services for an employer if

(a) The individual receives no compensation or is paid expenses, reasonable benefits, or a nominal fee to perform the services for which the individual volunteered; and

(b) Such services are not the same type of services which the individual is employed to perform for such employer.

5. "Employee Health Benefits" or "Health Benefits" means providing health care benefits for employees (or employees and their dependents) at employer cost or making an employer contribution toward the purchase of such health care benefits for employees (or employees and their dependents), provided that the employer cost or contribution equals no less than $1 an hour for the average work week of such employee, and provided further that any employee payment or contribution toward health care shall not exceed 50 cents an hour for the average work week for such employee.

6. "Grant" means any form of financial assistance to a "Grantee" as set forth and defined in Section 1:813(7). "Grant" does not include financial assistance used for the purchase or lease of property or other non-personnel costs.

7. "Grantee" is a person or entity that is a recipient of any financial assistance from the City in the form of any federal, state or local grant program administered by the City, revenue bond financing, tax increment financing, tax abatement, tax credit, direct grant, or any other form of financial assistance that exceeds $10,000 for any 12-month period, including any contractors, subcontractors, or leaseholders of the grantee whose contract, subcontract or lease with the grantee exceeds $10,000 for any 12-month period.

8. "Living Wage" means a wage equal to the levels established in Section 1:815.

9. "Person" means any individual, copartnership, corporation, association, club, joint adventure, estate, trust, and any other group or combination acting as a unit, and the individuals constituting such group or unit.

10. "$10,000 for any 12 month period" is computed by taking the total amount of the contract, grant or loan and dividing it by the number of months the contract, grant or loan covers.

1:814. Applicability.

1. This Chapter shall apply to any person that is a contractor/Respondent or grantee as defined in Section 1:813 that employs or contracts with five (5) or more individuals; provided, however, that this Chapter shall not apply to a non-profit contractor/Respondent or non-profit grantee unless it employs or contracts with ten (10) or more individuals.
(2) This Chapter shall apply to any grant, contract, or subcontract or other form of financial assistance awarded to or entered into with a contractor/Respondent or grantee after the effective date of this Chapter and to the extension or renewal after the effective date of this Chapter of any grant, contract, or subcontract or other form of financial assistance with a contractor/Respondent or grantee.

1:815. Living Wages Required.

(1) Every contractor/Respondent or grantee, as defined in Section 1:813, shall pay its covered employees a living wage as established in this Section.

(a) For a covered employer that provides employee health care to its employees, the living wage shall be $8.70 an hour, or the adjusted amount hereafter established under Section 1:815(3).

(b) For a covered employer that does not provide health care to its employees, the living wage shall be $10.20 an hour, or the adjusted amount hereafter established under Section 1:815(3).

(2) In order to qualify to pay the living wage rate for covered employers providing employee health care under subsection 1:815(1)(a), a covered employer shall furnish proof of said health care coverage and payment therefor to the City Administrator or his/her designee.

(3) The amount of the living wage established in this Section shall be adjusted upward no later than April 30, 2002, and every year thereafter by a percentage equal to the percentage increase, if any, in the federal poverty guidelines as published by the United States Department of Health and Human Services for the years 2001 and 2002. Subsequent annual adjustments shall be based upon the percentage increase, if any, in the United States Department of Health and Human Services poverty guidelines when comparing the prior calendar year's poverty guidelines to the present calendar year's guidelines. The applicable percentage amount will be converted to an amount in cents by multiplying the existing wage under Section 1.815(1)(b) by said percentage, rounding upward to the next cent, and adding this amount of cents to the existing living wage levels established under Sections 1:815(1)(a) and 1:815(1)(b). Prior to April 1 of each calendar year, the City will notify any covered employer of this adjustment by posting a written notice in a prominent place in City Hall, and, in the case of a covered employer that has provided an address of record to the City, by a written letter to each such covered employer.
Living Wage Ordinance

The Ann Arbor Living Wage Ordinance (Section 1:811-1:821 of Chapter 23 of Title I of the Code) requires that employers providing services to or for the City for a value greater than $10,000 in a twelve-month period of time, as well as certain recipients of grants for financial assistance, shall pay employees a prescribed minimum level of compensation for the time those employees perform work on a City of Ann Arbor contract or in connection with a federal, state, or local grant program administered by the City or financial assistance awarded by the City. Companies employing fewer than 5 persons and non-profits employing fewer than 10 persons are exempt from the Ordinance. If this exemption applies to your firm, please check below:

_____ This company is exempt due to the fact that we employ or contract with fewer than 5 individuals.

_____ This non-profit agency is exempt due to the fact that we employ or contract with fewer than 10 employees.

The contractor or grantee agrees:

(a) To pay each of its employees performing work on any covered contract or grant with the City, no less than the living wage, which is defined as $8.70/hour for those employers that provide employee health care (as defined in the Ordinance at Section 1:815(1) (a)), or no less than $10.20/hour for those employers that do not provide health care. It is understood that the Living Wage will be adjusted upward each year beginning April 30, 2002 and covered employers will be required to pay the adjusted amount thereafter.

(b) **Please check appropriate box(es) below:**

Employees who are assigned to the City project or grant will be paid at or above the applicable living wage without health benefits

Yes_____  No_____

Employees who are assigned to the City project or grant will be paid at or above the applicable living wage with health benefits

Yes_____  No_____

(c) To post a notice approved by the City regarding the applicability of the Living Wage Ordinance in every work place or other location in which employees or other persons contracting for employment are working.

(d) To provide to the City payroll records or other documentation as requested by the City; and,

(e) To permit access to work sites to City representatives for the purposes of monitoring compliance, investigating complaints or non-compliance.

The undersigned authorized representative hereby obligates the contractor/Respondent or grantee to the above stated conditions under penalty of perjury and violation of the Ordinance.

_________________________________________ ___________________________________________
Company Name     Signature of Authorized Representative

_________________________________________ ___________________________________________
Address      Type or Print Name and Title

_________________________________________ ___________________________________________
City         State  Zip

_________________________________________ ___________________________________________
Phone       Date

Human Rights Office; City of Ann Arbor; P.O. Box 8647; Ann Arbor, MI 48107; 734/994-2803 fax: 734/994-2590
Exhibit C-1 of Attachment B
CITY OF ANN ARBOR
DECLARATION OF COMPLIANCE

Living Wage Ordinance

The Ann Arbor Living Wage Ordinance (Section 1:811-1:821 of Chapter 23 of Title I of the Code) requires that employers providing services to or for the City for a value greater than $10,000 in a twelve-month period of time, as well as certain recipients of grants for financial assistance, shall pay employees a prescribed minimum level of compensation for the time those employees perform work on a City of Ann Arbor contract or in connection with a federal, state, or local grant program administered by the City or financial assistance awarded by the City. Companies employing fewer than 5 persons and non-profits employing fewer than 10 persons are exempt from the Ordinance. If this exemption applies to your firm, please check below:

_____ This company is exempt due to the fact that we employ or contract with fewer than 5 individuals.

_____ This non-profit agency is exempt due to the fact that we employ or contract with fewer than 10 employees.

The contractor or grantee agrees:

(f) To pay each of its employees performing work on any covered contract or grant with the City, no less than the living wage, which is defined as $9.09/hour for those employers that provide employee health care (as defined in the Ordinance at Section 1:815(1) (a)), or no less than $10.66/hour for those employers that do not provide health care. It is understood that the Living Wage will be adjusted upward each year on April 30, and covered employers will be required to pay the adjusted amount thereafter. The rates stated above include the adjustment for 2002.

(g) Please check appropriate box(es) below:

Employees who are assigned to any covered City project or grant will be paid at or above the applicable living wage without health benefits

Yes_____ No_____

Employees who are assigned to any covered City project or grant will be paid at or above the applicable living wage with health benefits

Yes_____ No_____

(h) To post a notice approved by the City regarding the applicability of the Living Wage Ordinance in every work place or other location in which employees or other persons contracting for employment are working.

(i) To provide to the City payroll records or other documentation as requested by the City; and,

(j) To permit access to work sites to City representatives for the purposes of monitoring compliance, investigating complaints or non-compliance.

The undersigned authorized representative hereby obligates the contractor/vendor or grantee to the above stated conditions under penalty of perjury and violation of the Ordinance.

_________________________________________  ___________________________________________
Company Name     Signature of Authorized Representative

_________________________________________  ___________________________________________
Address      Type or Print Name and Title

__________________________________________  ___________________________________________
City         State  Zip

__________________________________________  ___________________________________________
Phone       Date

Human Rights Office; City of Ann Arbor; P.O. Box 8647; Ann Arbor, MI 48107; 734/994-4856 fax: 734/994-2590
YOUR RIGHTS UNDER THE ANN ARBOR LIVING WAGE ORDINANCE

→ New rate effective April 30, 2003 ←

$9.09 per hour
if the employer provides health care benefits*

$10.66 per hour
if the employer does NOT provide health care benefits*

Employers providing services to or for the City of Ann Arbor or recipients of grants or financial assistance from the City of Ann Arbor for a value of more than $10,000 in a twelve-month period of time must pay those employees performing work on a City of Ann Arbor contract or grant, the above living wage.

ENFORCEMENT

The City of Ann Arbor may recover back wages either administratively or through court action for the employees that have been underpaid in violation of the law. Persons denied payment of the living wage have the right to bring a civil action for damages in addition to any action taken by the City.

Violations of this Ordinance is punishable by fines of not more than $500/violation plus costs, with each day being considered a separate violation. Additionally, the City of Ann Arbor has the right to modify, terminate, cancel or suspend a contract in the event of a violation of the Ordinance.

For Additional Information or to File a Complaint
Contact:
Ann Arbor Human Rights Office
734/994-4856

* Health Care benefits includes those paid for by the employer or making an employer contribution toward the purchase of health care. The employee contribution must not exceed $.50 an hour for an average work week; and the employer cost or contribution must equal no less than $1/hr for the average work week.

The law requires employers to display this poster where employees can readily see it.
ATTACHMENT C- BOND FORMATS

PERFORMANCE BOND

(1) ___________________________________________________________ of
(referred to as "Principal"), and _______________________________________, a corporation duly
authorized to do business in the State of Michigan (referred to as "Surety"), are bound to the City of Ann Arbor,
Michigan (referred to as "City"), for $ _____________________________ , the payment of which Principal
and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, by
this bond.

(2) The Principal has entered a written contract with the City dated _____________________ , 20___, for:
and this bond is given for that contract in compliance with Act No. 213 of the Michigan Public Acts of 1963, as
amended, being MCL 129.201 et seq.

(3) Whenever the Principal is declared by the City to be in default under the contract, the Surety may promptly
remedy the default or shall promptly:

(a) complete the contract in accordance with its terms and conditions; or

(b) obtain a bid or bids for submission to the City for completing the contract in accordance with its
terms and conditions, and upon determination by Surety of the lowest responsible bidder, arrange for a
contract between such bidder and the City, and make available, as work progresses, sufficient funds to pay
the cost of completion less the balance of the contract price; but not exceeding, including other costs and
damages for which Surety may be liable hereunder, the amount set forth in paragraph 1.

(4) Surety shall have no obligation to the City if the Principal fully and promptly performs under the contract.

(5) Surety agrees that no change, extension of time, alteration or addition to the terms of the contract or to the
work to be performed thereunder, or the specifications accompanying it shall in any way affect its
obligations on this bond, and waives notice of any such change, extension of time, alteration or addition to
the terms of the contract or to the work, or to the specifications.

SIGNED AND SEALED this ______ day of _____________ , 20__.

(Name of Surety Company) (Name of Principal)

By (Signature) (Signature)

Its (Title of Office) (Title of Office)

Name and address of agent:

Stephen Postema, City Attorney
Publisher’s Note

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The referenced report done by students at the University of Michigan was not available at the time this was published.