

Instructions for Completing the Questionnaire

Bidders should complete the following three tabs: "Assumed Basic Capabilities," "Questionnaire" and "Price Quote."
For the Questionnaire tab, respond to each item with a 0, 1, 2, 3 or 4 based on the descriptions below.
Use the Comments column in the Questionnaire tab for any clarifications or written comments.
Where required, please provide written responses in the spaces provided.

0 - Functionality is not provided: The functionality is not included in the proposed system.

1 - Functionality is provided, but requires customized integration with a third party: The bidder has established a relationship with a business partner to provide this functionality, but it needs customization or a workaround.

2 - Functionality is provided by the bidder, but requires customization: The functionality can be accomplished with the bidder's product, but some customization or workaround is required.

3 - Functionality is provided seamlessly by a third-party product: The bidder has established a relationship with a business partner to provide the functionality integrated into its application. No customization or workaround is needed.

4 - Functionality is provided "out of the box": The bidder provides the functionality from its code base. No customization or workaround is required.

Additional Notes to the Bidder:

Do not enter any value other than 0, 1, 2, 3 or 4 in the Response column in the "Questionnaire" tab. The Comments column is provided for you to provide clarification, where necessary.

We assume that the Bidder can support all features and capabilities listed in the "Assumed Basic Capabilities" tab natively and out-of-the-box. If there are any exceptions or features that cannot be supported, please note them in the appropriate area at the top of the "Assumed Basic Capabilities" tab.

Bidders are cautioned not to indicate that a function is included in the standard offering when that function is still in development. When this is the case, bidders should note this in the Comments column of the "Questionnaire" tab and should indicate the expected date on which the feature will be made available.

By responding in the affirmative to a capability item, the bidder agrees to support the capability in its product.

If ANY of the basic features and capabilities listed below cannot be supported out-of-the-box, please explain using the space below:

Please explain here...

Basic features and capabilities:

- Call forwarding (aka call coverage) with customizable rules
- Blind call transfer (aka cold transfer)
- Consultative call transfer (aka warm transfer)
- Shared line appearances; Boss/Admin; Boss/Delegate
- Call pickup
- Call waiting
- Call blocking
- Call parking
- One number service (aka single number reach)
- Group/multiparty calling, including escalation from two-way to group call
- Distinctive ringing patterns
- Direct in-bound dial (DID) number
- Caller ID and call screening
- Caller ID masking/control
- Find-me, follow-me and simultaneous ringing
- Missed call notification
- Call logs
- Directory integration
- Click-to-dial
- Dial-by-name
- Speed dialing (aka abbreviated dialing)
- Customizable "favorites list" for contacts
- Last number dialed
- Extension dialing
- Fax
- Computer-telephony integration (CTI) including screen pops, dialing, call transfers and other telephony features
- Do Not Disturb (DND)
- Autoattendant
- Automatic callback with callback message
- Station lock (based on time of day, etc.)
- Unified messaging mailbox that supports email, voicemail and fax-mail message types
- Speech access options for voicemail for users and callers
- User message storage and delete options
- User greeting options, including creation of customized voice greeting for mailbox
- Message waiting indication
- Back-up and restore
- Basic instant messaging and presence
- Programmable music on hold
- Integrated audio, video and web conferencing services
- Centralized UI for moderating, managing and accessing an end user's conferences via a desktop and web client
- IPv6 support
- Four Digit Dialing
- Group Messaging mailbox
- Multiple ringtones
- Outbound Messaging/Mass Notification

Requirements	Response	Comments
A Voice Requirements		
A1 Compliant with high quality standards	0	
A2 Able to support G711 codecs	0	
A3 Can scale to 75 concurrent calls	0	
A4 Can notify users when call quality issues are detected	0	
UC Integration		
A5 Can integrate with Microsoft Teams telephony environment via API, etc.	0	
A6 Allow users to set their preferred device for routing incoming and outgoing calls	0	
A7 Presence management for user availability, voice, IM and workstream communications across all end-user client devices	0	
A8 Able to interoperate smoothly with M365 Teams collaboration platform that is currently in use	0	
A9 Secure, archivable and auditable enterprise messaging, IM or workstream collaboration services	0	
A10 Integrated UC client launch of preferred third-party web conferencing service/application	0	
System and User Features for Voice		
A11 Support for call hunt and hunt groups	0	
A12 Encrypted call recording	0	
A13 Remote user/mobility features	0	
A14 Emergency notification/location (E-911, etc.) capabilities	0	
A15 Least cost routing	0	
A16 Skills-based routing	0	
A17 Hot desking	0	
A18 Do not disturb (DND) breakthrough and exceptions	0	
A19 Interactive Voice Respnse IVR	0	
System Features for Converged Networking		
A20 Interface with established local and long-distance public networks	0	
A21 Trunk aggregation	0	
A22 Time-of-day (ToD) routing	0	
A23 Able to interoperate smoothly with M365 Teams and Zoom conferencing system/meeting solutions that are currently in use	0	
Total Score	0	
Maximum Possible Score	92	
Standardized Score	0.00	
B UC Endpoints		
B1 Certified to interoperate with Microsoft endpoints and devices	0	
B2 Integrated call controls (including video and collaboration)	0	
B3 Personal call management across multiple devices and device types (desk phone, softphone, mobile, etc.)	0	
B4 Centralized management, control and distribution of new features and upgrades directly to endpoints	0	
B5 Support for wideband, high-quality audio, including G.711 or other codec support	0	

B6 Support for noise cancellation	0
B7 Support for digital signal processing to remove static	0
B8 Choice of headset styles to ensure comfort and enhanced ergonomics	0
B9 Support for bring your own device (BYOD) programs	0
B10 Support for high-definition video (720p or greater)	0
B11 Soft labeling/soft keys	0
B12 IEEE 802.3af PoE standards	0
B13 Full duplex speakerphone models	0
B14 Silence suppression	0
B15 Echo cancellation	0
B16 Integrated support for LDAP directories	0
B17 Customizable phonebook	0
B18 Call log	0
B19 Support for analog devices	0
B20 Keypad or other modules and adapters to expand the phone's functionality are available (describe which modules are available in the Comments column)	0

UC Soft Client(s)

B21 Soft client can run in/on Edge, Chrome or Safari latest versions	0
B22 All soft clients are able to provide a single interface for all communications functions (please note exceptions for each client in Comments column)	0
B23 Customizable GUI	0
B24 Capable of using all call control features mentioned under 'System and User Features for Voice' above.	0
B25 Keypad dialing	0
B26 Address books with click-to-dial	0
B27 Call lists	0
B28 Drag and drop	0
B29 Copy/paste	0
B30 Post-connect dual-tone multifrequency (DTMF) dialing	0
B31 Access to online help resources	0
B32 Video support	0
B33 WebRTC support	0

Attendant Services

B34 Customizable GUI	0
B35 Attendant-specific function keys, speed dial lists and directory functionality	0
B36 Call queuing, call selection and recall handling with call indicators and real-time statistics (calls in queue, time in queue, etc.)	0
B37 Interposition transfer with real-time availability views of other attendants in attendant groups	0
B38 Overflow to another attendant	0
B39 Softphone call handling controls with one-click access (log on/off, answer, disconnect, hold, retrieve from hold, dial, transfer, consult, etc.)	0

B40	Screen popup for incoming calls	0
B41	Visual status of user's line (busy, idle, etc.)	0
B42	Night service capabilities	0
B43	Support for paging system access	0
B44	Support for intrusion/break in/break-through/override	0
B45	Trunk-to-trunk transfer	0
	Total Score	0
	Maximum Possible Score	180
	Standardized Score	0.00

C Voicemail, Messaging and Presence

Voicemail and Unified Messaging (UM)

C1	Message classification options that protect confidentiality and limit distribution	0
C2	Personal UI tools and capabilities	0
C3	Compliance features for HIPPA, eDiscovery	0
C4	System maintenance and support features	0
C5	Visual voicemail with message transcription	0
C6	Integration with Microsoft Office 365, Outlook, Exchange, Teams web client	0
C7	Integration with Microsoft Office 365, Outlook, Exchange, Teams mobile client	0
C8	Integration with Microsoft Office 365, Outlook, Exchange, Teams desktop client	0

Instant Messaging (IM) or Workstream Collaboration (WSC) application

C9	Able to change communications mode during an IM/WSC session to a meeting or call	0
C10	Able to escalate from a one-on-one to a group chat	0
C11	Can initiate group chat based on a group of users, email list or other contacts list (please describe in Comments column)	0
C12	Can invite members at any time during group chat	0
C13	Can securely federate IM/WSC with Microsoft Teams	0
C14	Guest user access for external parties	0
C15	Can integrate with Azure AD	0
C16	Automatic archiving of chat messages with configurable retention periods	0
C17	Visual notification pop-up for inbound or new messages	0
C18	Able to set audio notification for inbound or new messages	0
C19	Message timestamps	0
C20	Messages persist beyond the end of a chat session (required to be considered a WSC application)	0
C21	Ability to thread/nest conversations	0
C22	File sharing	0
C23	Simultaneous co-creation/co-editing of documents	0
C24	Icons or thumbnails for documents shared in chat messages to indicate their contents or document/file type	0
C25	Able to send PNG, JPEG, GIF, etc. images in chat messages	0
C26	Thumbnails for images shared in chat messages	0

C27	Manual and automatic creation of hyperlinks for websites/URLs present in chat messages	0
C28	Thumbnails for websites/URLs present in chat messages	0
C29	Emoticons	0
C30	Stickers	0
C31	Able to play animated GIFs shared in the chat/messaging window	0
C32	Able to limit guest user access to shared files, documents, images, etc.	0
C33	Able to set/limit duration of guest user access	0
C34	Able to restrict visibility of messages for guest users based on time/date range or other method (please describe in Comments column)	0

Presence Management and Automation

C35	Users can manage personal presence and set their current state	0
C36	Users can create customized presence state(s)	0
C37	Users can set preferred device to make/receive calls	0
C38	Track presence status and available media types for users on contact list	0
C39	Track presence by media, including IM/WSC presence and telephony presence across all devices/clients	0
C40	Route requests for contacts seamlessly and securely across private voice, data and wireless networks	0
C41	Route requests for contacts seamlessly and securely across public wired/wireless networks	0
C42	Ability to request/receive notification of changes to contact's availability or presence status (if busy, be notified when they become available, etc.)	0
C43	Ability to map user's presence to Microsoft Outlook and Teams calendar	0
C44	Automatic adjustment of presence status based on calendar information	0
C45	Automatic adjustment of presence status based on communication mode or device type	0
C46	Automatic adjustment of presence status based on network connectivity status	0
C47	Automatic adjustment of presence status based on location	0
C48	Automatic adjustment of presence status based on user activity	0
C49	Automatic adjustment of presence status based on identity of other parties in the communications channel	0
C50	Multiple status modes including online/offline, do not disturb, on a call, in a meeting, busy, limited availability, unavailable, out of office, etc.	0
C51	Authorized users can visually observe the status of other users on the network	0
C52	Color-coded visual icon or status indicator (green, yellow, red, gray, etc.)	0
C53	Users can set custom nickname/change username displayed with the presence indicator	0
C54	Presence can be determined across groups of people based on highest level of availability for one or more members of that group	0
C55	All communications modes can be initiated from the same screen/window that contains the presence information	0
C56	Able to limit available communications modes based on user's presence (e.g. cannot call a user set to Do Not Disturb)	0
C57	Can embed presence information into SMART system	0

Total Score	0
Maximum Possible Score	196
Standardized Score	0.00
D Audio, Video and Web-Based Conferencing/Meeting Solutions	
D1 Simultaneous, shared conferencing for 8 participants	0
D2 Desktop/screen sharing	0
D3 Share specific application(s)/document(s)	0
D4 Editing of documents	0
D5 Initiate conference via meeting invitation	0
D6 Ad hoc formation of a conference from contact or by adding participants to existing session	0
D7 Conference/meeting recording	0
D8 Invite participants via email	0
D9 Can integrate with Teams and Zoom	0
D10 Can integrate with Microsoft Outlook	0
D11 Can integrate with content collaboration platform, content service platform or enterprise file synch and sharing application	0
D12 Log conferencing activity for billing and usage analysis	0
D13 Chat or messaging capabilities (e.g. IM, WSC, other)	0
D14 Real-time statistics (hold times, agent availability) for web chat	0
D15 Can change communication mode (e.g. audio to video, video to screen share, etc.) during session	0
D16 Automatic, live generation of closed captions during a meeting or conferencing session	0
Video for UC Integration	
D17 Can support multiple use cases and access methods (i.e. desktop, mobile, tablet, room-based, etc.)	0
D18 Point-to-point	0
D19 Multiparty	0
D20 Support for high-definition video (720p or greater). Please indicate the maximum supported resolution in Comments column.	0
D21 Can support existing polycom and Zoom appliance(s)	0
Total Score	0
Maximum Possible Score	84
Standardized Score	0.00
E Mobile Communications	
Mobile Capabilities	
E1 Support for Android mobile operating system (please indicate version in Comments column)	0
E2 Support for iOS mobile operating system (please indicate version in Comments column and whether CallKit integration is used)	0
E3 Common user experience shared across desktop, web and mobile clients, including UI design/elements, meeting join experience, etc.	0
E4 Can make, receive, divert, transfer, mute, hold, park calls from mobile client (please indicate any exceptions in the Comments column)	0

E5 VoIP over cellular data channel (4G, 5G)	0
E6 Can call back to mobile phone from mobile app	0
E7 Can fork inbound calls to ring multiple devices including mobile devices	0
E8 Support for push notifications	0
E9 Support for native dialing	0
E10 Shared presence when on mobile app/client	0

Fixed Mobile Convergence (FMC)

E11 VoIP, wireless LAN and cellular mobility combined on a single mobile device	0
E12 Allows for hand-offs between WLAN and cellular networks without dropping calls (for dual-mode phones)	0
E13 Able to handle an inbound VoIP call on the mobile client while the user is engaged in a separate call via the cellular network without drops or crashes	0
Total Score	0
Maximum Possible Score	52
Standardized Score	0.00

F Survivability, Networking and Security

Survivability, Redundancy and Network Reliability

F1 Options for survivability within a site (please describe available options in Comments column)	0
F2 Options for redundancy to alternate service node/data centre (please describe available options in Comments column)	0
F3 Automatic content and data backup, including the ability to set retention periods	0
F4 Support for 200 users (for UCaaS, please indicate the maximum number of users per tenant in the Comments column)	0
F5 Alternate routing for inbound calls in the event of a branch isolation event, for both DID and toll-free numbers (please describe in Comments column)	0

System Security Capabilities

F6 Support for TLS for user endpoints (please indicate most recent supported version in Comments column)	0
F7 Support for SRTP for user endpoints (please indicate most recent supported version in Comments column)	0
F8 Compliant with FIPS, etc. standards	0
F9 Encryption of data and content at rest	0
F10 Dedicated virtual LAN segment for voice	0
F11 Split tunnelling for voiceover VPN when using desktop software clients	0
F12 Endpoint user authentication	0
F13 Support for multifactor authentication (MFA)	0
F14 Identity and access management/protection from unauthorized access	0
F15 DoS and DDoS protection	0
F16 TDoS protection for inbound calls	0
F17 Spam protection	0
F18 IPv4 interworking	0
F19 Call and Screen recording	0

F20	Local PSTN access in case of WAN outage	0
F21	High availability (please describe available capabilities in the Comment column)	0
F22	Real-time and historical reporting, including call detail records (CDR)	0
F23	Real-time notification of network performance and availability, security vulnerabilities and platform resource usage	0
F24	Troubleshooting tools (please describe available features in the Comments column)	0
F25	WebRTC gateway capabilities to allow WebRTC endpoints to connect non-WebRTC devices	0
F26	Quality-of-experience (QoE) monitoring and reporting	0
	Total Score	0
	Maximum Possible Score	92
	Standardized Score	0.00

G System Management

G1	System management tools, including dashboards, diagnostic tools, alarm monitoring, notifications, fault detection and management, etc.	0
G2	System management tool accessible through a web interface or mobile app	0
G3	Online help and templates available	0
G4	Support for simultaneous administrative access by multiple users	0
G5	Moves, adds and changes implemented transparently across all locations	0
G6	No disruption of service due to system management and administration	0
G7	Telephony and broader UC services remain operational during backups, patches, updates and upgrades	0
G8	Audit logs	0
G9	Authentication logging	0
G10	Multilevel authorization access	0
G11	Password attribute customization	0
G12	Integration into ServiceNow	0
G13	Role-based support for superusers, bill payers, country/business unit-specific users, and specific site users	0
G14	Voice and video quality monitoring at an employee, site, business unit and country level	0

Configuration Management Tools

G15	User moves, adds and changes, including emergency services (e.g. E911), data for endpoints	0
G16	VoIP and UC group definitions and assignments	0
G17	Call restriction assignments	0
G18	Class-of-service definitions and assignments	0
G19	Dial plan and routing parameters	0
G20	Call admission control (CAC) parameters	0
G21	Trunk group definitions and individual trunk circuit programming	0
G22	Trunking gateways	0
G23	Bulk provisioning of all UC services, including corporate directory integration (please note any exceptions in the Comments column)	0

API Technology and Integration Tools

G24	Integration with leading commercially available tools (M365, Zoom)	0
G25	Integration with custom applications (SMART)	0
G26	Integration with IVR	0
G27	Integration with CTI Screen pops	0

Performance Management

G28	Performance management reporting	0
G29	Usage reporting tool providing graphical and numerical data for call attempts, traffic load, incoming/outgoing calls and busy-hour call completion for selected periods	0
G30	Traffic measurements, statistics and counters on business group call usage, patterns, feature usage and hunt groups	0
	Total Score	0
	Maximum Possible Score	120
	Standardized Score	0.00

H Service, Support and Billing

H1	Live 24/7 human support available in NAM regions	0
H2	Live 24/7 human support available in English languages	0
H3	Support portal available in English languages	0
H4	Documentation available in English languages	0
H5	Support for electronic bill paying	0
	Total Score	0
	Maximum Possible Score	20
	Standardized Score	0.00

Questions about Service Level Agreement (for UCaaS deployments only)

Please indicate below your telephony availability service-level target as a percent and the credits for nonconformance/breaching said target:

...

Please indicate below your IM&P or WSC availability service-level target as a percent and the credits for nonconformance/breaching said target:

...

Please indicate below if your SLA is site-based or enterprisewide:

...

Please indicate below if your SLA is end-to-end or only covers the UCaaS service back end:

...

Please indicate below your MTTR service level target for P1 incidents, in minutes/hours:

...

Please indicate below your voice quality service-level target, in MOS score, or packet loss/jitter/latency:

...

Please also confirm that basic features and capabilities in "Assumed Basic Capabilities" tab can be supported

Bidders are cautioned not to indicate that a function is included in the standard offering when that function is still in development.

When this is the case, bidders should write a note in the Comments column above and indicate the expected date on which the feature will be made available.

	UCC Users	Telephony-Only Users	Common Area Phones
TOTALS (by requirement)	0	0	0

NOTE TO BIDDERS: Please modify the below as needed. The number of offers and the number of items within each offer shown below are arbitrary and for example purposes only.

Quote/Offer:		Quoted on:	Valid Until:	Offer Description:							
Option 1		Date of Quote/Offer	Date Valid Until	High-level description of this offer...							
Item	Component	Model/SKU	Unit	Quantity	Monthly Recurring Cost per Unit	Extended Monthly Recurring Cost	Nonrecurring Cost per Unit	Extended Nonrecurring Cost	List Price	Discount (%)	Notes/Comments:
1	bidder response required...	...	...	...	...	...	...	...	...	...
2	bidder response required...	...	...	...	...	...	...	...	...	...
3	bidder response required...	...	...	...	...	...	...	...	...	...
4	bidder response required...	...	...	...	...	...	...	...	...	...
5	bidder response required...	...	...	...	...	...	...	...	...	...
6	bidder response required...	...	...	...	...	...	...	...	...	...
7	bidder response required...	...	...	...	...	...	...	...	...	...
8	bidder response required...	...	...	...	...	...	...	...	...	...
9	bidder response required...	...	...	...	...	...	...	...	...	...
10	bidder response required...	...	...	...	...	...	...	...	...	...
					Total Monthly Recurring Cost:	0	Total Nonrecurring Cost:	0			

Quote/Offer:		Quoted on:	Valid Until:	Offer Description:							
Option 2		Date of Quote/Offer	Date Valid Until	High-level description of this offer...							
Item	Component	Model/SKU	Quantity	Monthly Recurring Cost per Unit	Extended Monthly Recurring Cost	Nonrecurring Cost per Unit	Extended Nonrecurring Cost	List Price	Discount (%)	Notes/Comments:	
1	bidder response required...	...	...	...	...	...	...	...	...
2	bidder response required...	...	...	...	...	...	...	...	...
3	bidder response required...	...	...	...	...	...	...	...	...
4	bidder response required...	...	...	...	...	...	...	...	...
5	bidder response required...	...	...	...	...	...	...	...	...
6	bidder response required...	...	...	...	...	...	...	...	...
7	bidder response required...	...	...	...	...	...	...	...	...
8	bidder response required...	...	...	...	...	...	...	...	...
9	bidder response required...	...	...	...	...	...	...	...	...
10	bidder response required...	...	...	...	...	...	...	...	...
					Total Monthly Recurring Cost:	0	Total Nonrecurring Cost:	0			

Standard Score Summary

Criterion	Standard Scores for each Criterion
A - Voice Requirements	0.00
B - UC Endpoints	0.00
C - Voicemail, Messaging and Presence	0.00
D - Audio, Video and Web-Based Conferencing/Meeting Solutions	0.00
E - Mobile Communications	0.00
F - Survivability, Networking and Security	0.00
G - System Management	0.00
H - Service, Support and Billing	0.00

Notes:

Column D shows the standardized score from 0 to 4 for each of the major functional areas.
A higher score indicates a stronger capability in this area.