

Glossary of Terms for Types Of Services

CONSULTING SERVICES

Include the qualified, professional ability of the Vendor to offer analysis, recommendations, design or programming expertise to the State relating to information technology systems with regard to the Categories of Expertise defined in RFP Section II.5. Said expertise must include a current knowledge of the technology marketplace, related information technology issues and trends, and may include the ability to:

- a) Analyze existing technological environment, including hardware, software, and live operations and transaction volumes;
- b) Design and develop new systems, add-ons or modifications to existing architectures, including single platform computer systems and distributed systems;
- c) Develop functional and/or design specifications, technical writing and documentation;
- d) Provide operating system and/or applications programming, recommendations, including acquisition of off-the-shelf products, or integration of custom programming products;
- e) Install, test, audit and fully integrate programming or products in the Issuing Entity's environment.

SYSTEMS INTEGRATION SERVICES

Require the Vendor to assume principal responsibility and liability for designing, installing and fully integrating projects into live operating environments. The SI Vendor is required to show prior, substantial experience as a Systems Integrator in order to pre-qualify under this RFP, including principal responsibility for project management and acquisition of project materials or components from third party sources. All SI Vendors will be required to comply with the requirements set forth in RFP Section II.4.2.2. Duties include but are not limited to the following:

- a) Analyze existing technological environment, including hardware, software, and live operations and transaction volumes;
- b) Design and develop new systems, add-ons or modifications to existing architecture, including single platform computer systems and distributed systems;
- c) Develop functional and/or design specifications, technical writing and documentation;
- d) Provide operating system and/or applications programming, recommendations, including acquisition of off-the-shelf products, or integration of custom programming products;
- e) Acquire hardware/software products and services utilizing existing state contracts in accordance with the terms of this RFP and resulting Project Definition/Specifications;
- f) Coordinate and supervise multiple service or product providers;
- g) Install, test, audit and fully integrate a new system within the Issuing Entity's environment; and
- h) Provide cultural transitioning of Issuing Entity's workforce to the new environment, including training of Issuing Entity's employees and other end users at Issuing Entity's site as identified in the Project Definition/Specifications.

TRAINING SERVICES

Will include Vendor's ability to furnish pre-packaged training products, and/or develop or customize training programs as requested, including Live Training, Computer Based/Multi-Media training which encompasses Internet-Delivered Training, and/or Video Based Training. Computer Based and Video Based Training are training delivery methods that provide alternatives and/or supplements to instructor-led classroom training. Both allow the student to advance at his or her own speed and to review as needed.

Live Training consists of instructor-led course work in a classroom setting either at the Vendor facility or at the Issuing Entity facility. Training may be "hands on" where the student works with the hardware and software and/or "demonstration" where the Instructor works with the hardware and software. The Issuing Entity will define its needs at the Project Definition/Specifications level.

Computer Based Training/Multi-Media (CBT) consists of instruction delivered on a computer, with or without supplemental workbook materials. In addition to the actual instruction, exercises are usually included. This methodology provides an opportunity for a high level of interactive participation by the student. CBT courses for computer software often simulate the software and sometimes also provide an alternative Help source. CBT training may be made available for individual computers or through a network to many computers.

Video Based Training (VBT) consists of instruction presented on video tapes, sometimes supplemented with hands-on exercises to reinforce the instruction. For computer courses, the "hands on" exercises are often performed on a computer using a supplied disk. Supplemental workbook materials may also be used.

Web Based Training (WBT) WBT consists of computer-based training that uses Web technologies (i.e. TCP/IP, HTTP, Web browsers, and HTML as the core language of the Web) and is delivered across networks. WBT can be broken down into real-time, non-real-time, and various combinations of the two. WBT has also been referred to as Internet Based Training (IBT), Web Based Learning (WBL), Web Based Instruction (WBI). These are all very similar, if not synonymous with WBT and for this RFP may be thought of as interchangeably.

Interactive Web Based Training (IWBT) IWBT can be thought of as an extension of WBT. It consists of computer-based training that uses Web technologies (i.e. TCP/IP, HTTP, Web browsers, and HTML as the core language of the Web) delivered across networks with the additional component of interactivity between the group of students and the instructor. Discussion forums, e-mail and/or chat sessions provide ways for trainees to interact with an instructor or the rest of the group.

Note: Please be reminded that the contracts awarded under Training Services can also be used for *customized* training under all categories of expertise. If customized training is required, Contractors who provide the Mode of Training (Live, CBT, VBT, WBT, IWBT) within the category of expertise for which training is being sought, will be solicited for bids. Those Contractors will be asked to bid hourly rates for the customization. If they do not have these rates on contract, they can amend their contracts to add these under Group 2: Optional Ancillary Job Classifications/Titles using a title such as *Customized Training Consultant* or some equivalent.

Note: NyeNet Intranet Accessibility - New York State is preparing to host an Intranet connectivity for all its Agencies and local governments whereby training may be delivered. Contractor may be asked to provide training across this network. Details would be provided at the project level.

ON-GOING SERVICES, MAINTENANCE & SUPPORT

(Descriptions related to On-Going Services, Maintenance & Support are subject to change based on finalization of amendment to add these services. Targeted for implementation early-mid 2002)

"On-Going Services" is synonymous with such phrases as "continuous", "extended", "over a long period of time", etc. "Maintenance & Support" is synonymous with assistance, help, prevention, anywhere, anytime, etc. and addresses software applications and systems that are newly developed and those that have been in place and operational for a time, as well as, the hardware on which the software, programs, applications, and systems reside. It will include Vendor's ability to provide 24X7 support, maintenance, monitoring, and/or management of a newly developed system as well as applications or systems that were developed and implemented in the past, including hardware and software. Support, maintenance, monitoring, and/or management includes keeping a functional unit in a specified state by performing preventive activities such as tests, measurements, replacements, product upgrades during and following the manufacturer's warranty periods, adjustments, and timely repairs. These services and support will assure enhanced response time, uptime, and reliability of hardware and software to better meet the day-

to-day needs of the business in a proactive manner through monitoring and managing of tools and processes. On-Going Services agreements may be established for up to five years (e.g. three years with two one-year renewal/extension options, two years with three one-year renewal/extension options, or any combination thereof that is a "best fit" for the particular support/maintenance services requested).

On Going Services may be provided:

- a. In house from the Issuing Entity's site exclusively
- b. From the contractor's site exclusively
- c. Or a combination of both using in house staff exclusively, contractor staff exclusively or a combination of both.

The hardware and/or software may reside:

- a. In-house at the Issuing Entity's site exclusively
- b. The contractor's site exclusively
- c. Or a combination of both.

The service provider's responsibilities would include but not be limited to:

- a. The on-going operational performance of programs (software) and the hardware on which the programs run within the Mainframe, Mid-Range, PC, or Printer environments (Refer to RFP Section II.5.2.7 Equipment Maintenance).
- b. The optimization of space requirements where applicable
- c. The address of all security issues where applicable
- d. The establishment of disaster recovery provisions

Particulars of the services to be provided will be specified at the project level in the Project Definition/Specifications. Because qualifications of Contractor in the areas of On-Going Services, Maintenance & Support may be more difficult and crucial than providing Computer Consulting, Systems Integration, and Training, Issuing Entities should consider stringent requirements in the Project Definition/Specifications (e.g. capital investments, certifications, inventory, etc.). Payments will be based on a pricing scheme that is most practicable for the services solicited. If such pricing is not on the Back-Drop Contracts, the contracts can be amended to accommodate the requested pricing schemes (e.g. per page, monthly fee, or yearly service fee). Refer to RFP Section VI.7.

For any Category of Expertise, the minimum-of-three (3) rule will apply in order for PSG to accept a project for On-Going Services, Maintenance & Support bid under any Category of Expertise (Refer to RFP Section VII.5). Below is a representative list of the categories and On-Going Services, Maintenance & Support. Clearly, On-Going Services, Maintenance & Support are more inherent for some categories than for others as illustrated in the Exhibit 1 below. However as technologies change and expand, the need for specific on going and support services, which are not now described in detail, may be added as they emerge. On-Going Services, Maintenance & Support will be available for all Categories of Expertise identified in this RFP and categories, which may be added in the future.

Exhibit 1

Category of Expertise	On-Going Services, Maintenance & Support
Systems Management (MF, MR, PC)	Application Service Providers (ASPs), Application Development & Maintenance Services
Electronic Output Management	Document/Records Management Services
Imaging Services	Image Conversion: Paper-to-Image & Microfilm/Fiche-to-Image

Help Desk Services

Information Security and/or
IT Management & Planning

Web Hosting Services

Equipment Maintenance
Mainframe, Mid-Range, PC, Printers, etc.

Help Desk/Call Center

Managed Security Services/Disaster Recovery/Penetration

Web Hosting Services

Break & Fix Maintenance or Fixed Rate Maintenance