**SECTION 7 Vendor Compliance Matrix**

Please respond with your proposal using the following Compliance Matrix described in the following section. Please provide the information requested and not links to outside sources of information such as a repair guide or other policies. Note: Respondents do not need to comment on every answer.

Applicable answers are:

* E = Exceeds: Vendor complies with the requirements and exceeds the requirements. Please provide information in the Comment section.
* C = Comply: Vendor complies with the requirements with no modification.
* PC = Partially Comply: Vendor complies with some of the requirements. Please provide information in the Comment section, along with the estimated cost of customization if required to meet the specification.
* A = Alternative: Vendor does not fully comply with the requirements but has an alternative functionality that would meet the needs of the agency. Please provide information in the comment section along with the estimated cost of customization if required to meet the specification.
* NC = Non-Compliant: The vendor does not comply with the requirement in its entirety.

| Item | Requirement | Response | Comments |
| --- | --- | --- | --- |
| **A** | **BASE CHARACTERISTICS OF THE INTERACTIVE VOICE RESPONSE SYSTEM** |
| 1 | The System must use human-quality speech vocabulary assembled into a smooth-flowing dialogue |  |  |
| 2 | The IVR System must be capable of recording vocabulary in any voice and any language |  |  |
| 3 | Must be able to support no less than 100 calls per hour |  |  |
| 4 | Scalable to support three times that capacity, please describe any additional licensing that may be required |  |  |
| 5 | The system must include voice prompts that allow customer to respond by phone touch tone key or voice response |  |  |
| 6 | Able to generate all text to speech messages required for operation of the system |  |  |
| 7 | Able to provide a welcome message as the first response to incoming callers, without requiring dependency on transit data |  |  |
| 8 | Able to generate an optional message after the welcome message, without requiring dependency on transit data |  |  |
| 9 | The system provides a “time out response” feature such that calls with no touch tone or voice response within a short period of time by the customer are acted upon automatically. Please provide proposed options for calls that time out |  |  |
| 10 | Describe the prompts that allow for system flow of automated information as a first choice over communication with a live representative |  |  |
| 11 | DTA calls are distributed first to customer service then to dispatch and then to voicemail. Describe the option to transfer to DTA’s automatic call distribution managed customer service operator in the first level menu |  |  |
| 12 | The system must allow a key ahead of touch tone inputs so experienced users do not have to wait for voice message prompts to complete prior to making a touch tone selection |  |  |
| 13 | The system must be able to permit transfer to a customer service agent via touch-tone key, which must remain constant throughout the customer interface |  |  |
| 14 | The system must allow for the customer to opt for the message to repeat at any time during or after a segment of voice message or a voice data response  |  |  |
| 15 | The system must allow for a start over option at any time except when entering data  |  |  |
| 16 | Other |  |  |
|  |  |  |  |
| **B** | **IVR SYSTEM FUNCTIONS** |  |  |
| 1 |  Integrate seamlessly with DTA’s Trapeze Pass Application, Build 17.0.10. paratransit scheduling software  |  |  |
| 2 | Integrate seamlessly with Samsung Galaxy Tablets for Automated Vehicle Location |  |  |
| 3 | Integrate with Avaya IP System |  |  |
| 4 | Open “Client-Server” architecture |  |  |
| 5 | Ability for riders to confirm previously scheduled trips via the phone |  |  |
| 6 | Ability for riders to cancel trips via the phone |  |  |
| 7 | Ability to do call backs to rider supplied phone numbers the night before a day of service to provide rider’s trip times and give the rider an opportunity to cancel their scheduled trip |  |  |
| 8 | Ability to provide Arrival Notification calls when triggered the in-vehicle AVL system to PASS and on to the IVR system |  |  |
| 9 | Ability for riders to quickly ascertain the Estimated Time of Arrival (“ETA”) of their pick-up, which will require interactive integration in real-time with other technologies such as MDT systems and CAD/AVL systems |  |  |
| 10 | Available in multiple languages, including English and Spanish at a minimum, with the ability to add additional languages. |  |  |
| 11 | Describe how multiple languages are supported by the System, including how they will be maintained during system changes. |  |  |
| 12 | Describe the ability of the system to send SMS and MMS text messages to clients, if any. |  |  |
| 13 | Describe the ability of the system to support Text-to-Speech |  |  |
| 14 | Describe the ability of the system to support Voice Recognition |  |  |
| 15 | A late cancellation is a cancellation less than two hours prior to the scheduled trip. Describe how the late cancellation window can be configured, and if the cancellation is within two hours, whether it will notify the caller and/or transfer the call to an agent |  |  |
| 16 | The System will allow for minor modifications of the script vocabulary and content by DTA staff without intimate knowledge of VXML or any other core scripting languages |  |  |
| 17 | Describe how minor script changes can be made, including any validation tools available that ensure script changes do not result in a broken menu flow or missing recordings |  |  |
| 18 | Describe whether the there is any option to conduct surveys to poll riders on select information. Describe any steps required to set up a survey and report on results. Describe any survey question types that are available. |  |  |
| 19 | Describe any ability to set up floodgate messaging and canned bulletins throughout the script, as well as messaging to select customer groups (e.g. dialysis clients, blind customers, etc. if available |  |  |
| 20 | Describe the steps required to add/modify an announcement and any available parameters describing when the content should be played |  |  |
| 21 | Speech creation should be integrated with the menu-builder |  |  |
| 22 | Describe the tools and methods of maintaining the vocabulary of the IVR system |  |  |
| 23 | Changes to any phrase in the menu should be automatically implemented at every location where that phrase occurs |  |  |
| 24 | Describe the ability to customize a call activity log, if any |  |  |
| 25 | Other |  |  |
|  |  |  |  |
| **C** | **DIAL OUT CAPABILITIES** |  |  |
| 1 | Describe how the system supports the following types of messages: |  |  |
|  | i. Next Day Trip Reminders: including option for client to cancel their trip at the time of the call |  |  |
|  | ii. Vehicle Arrival Notifications-call reminding clients that the vehicle will be arriving shortly |  |  |
|  | iii. Vehicle Schedule Update Notification-call notifying clients that the vehicle is delayed/ahead of schedule and will be missing the promised pick-up window |  |  |
|  | iv. Please describe any other message types you can support |  |  |
| 2 | Describe whether the system allows the client the option of not receiving one or more of the above-noted calls on a temporary or permanent basis |  |  |
| 3 | Describe the system’s ability to deliver all message types to numerous telephone numbers and/or numerous email addresses for any one client |  |  |
| 4 | Describe whether the system allows DTA to configure delivery parameters for each message type, including:  |  |  |
|  | i. Number of retries |  |  |
|  | ii. Delivery window (e.g. 6:00 p.m. to 9:00 p.m.) |  |  |
|  | iii. Expiration Time |  |  |
|  | iv. Voice mail and non-Voice mail messages |  |  |
| 5 | Describe the system’s ability to detect multiple types of answering machines and how the Proposed system deals with them |  |  |
| 6 | Describe whether the system allows callers to transfer to an agent or return to the main IVR menu without calling back |  |  |
| 7 | Describe the system’s ability to provide a Call Back Summary report |  |  |
| 8 | Describe the system’s ability to notify the passenger after a No Show has occurred reminding them that they missed their trip |  |  |
| 9 | Describe the system’s ability to enable/disable reminders and alert calls globally, on a client-by-client basis or on a trip-by-trip basis |  |  |
| 10 | Describe the system’s ability to track if the phone message was received, if the line was busy, and/or if the passenger pressed a button to acknowledge the message |  |  |
| 11 | Describe the system’s ability to offer passengers other options when delivering reminder and alert calls such as, repeating the message, repeating the message in another language, cancelling, etc. |  |  |
| 12 | Other |  |  |
|  |  |  |  |
| **D** | **ADMINISTRATIVE ENVIRONMENT OF THE PROPOSED SYSTEM** |  |  |
| 1 | Describe the administrative environment of the proposed system: |  |  |
|  | i. Web based, client server, etc. |  |  |
|  | ii. Remote access capabilities |  |  |
|  | iii. Administrative functions are available 24/7/365, excluding maintenance hours |  |  |
|  | iv. Administration interface is accessible via networked PC or remotely |  |  |
|  | v. Security provisions to manage access to the voice data repository and management interface |  |  |
|  | vi. Requires DTA PASS clients to enter a Personal Identification Number (PIN) to proceed with accessing the IVR function |  |  |
|  | vii. Menu driven, available command line tools |  |  |
|  | viii. Other |  |  |
| 2 | The system should be capable of 99% uptime and able to accept in-bound calls from local, long-distance and toll-free numbers  |  |  |
| 3 | The System must be able to manage paratransit schedule data including initiating or reviewing any automated processes, incorporating new data, and adding IVR specific data |  |  |
| 4 | Ensuring the System is functioning properly for the customers, including managing the voice menus, messages, individual voice recordings, and general usability and smoothness of the voice and prompts system |  |  |
| 5 | Messages from the system should be delivered via telephone, internet, and/or telephone devices for the deaf (TDD/711). |  |  |
| 6 | The IVR System should be consistent with respect to menu-based options between menus |  |  |
| 7 | Functions for editing similar to those found in most Windows applications, including  |  |  |
|  | i. Drop down |  |  |
|  | ii. Fast key |  |  |
|  | iii. “Right click” selections for cut, copy, past, find, replace, delete and other often used functions |  |  |
| 8 | Menu fonts and colors must support visually impaired users and should be consistent with other Windows applications |  |  |
| 9 | Explain what menu functions are adjustable or configurable |  |  |
| 10 | Explain whether the system provides acknowledgement, confirmation or warnings when adjustments to menu functions are made  |  |  |
| 11 | Data changes by the administrator are immediate, except for deletes or other actions that could adversely impact the live system |  |  |
| 12 | Describe any secondary approvals that are required to commit data or can adversely affect the live system |  |  |
| 13 | Other |  |  |
|  |  |  |  |
| **E** | **DATA MANAGEMENT** |  |  |
| 1 | The IVR System shall provide a structured method for incorporating new data into the System.  |  |  |
| 2 | Multiple data sets shall be supported such that the administrator may edit, copy, make available, compare, archive and otherwise manipulate the data as needed  |  |  |
| 3 | The System shall permit organizing and reviewing statistical data retrieved by the system for reporting to management for the purpose of evaluating IVR System usage, call transfer requests and specific function, route or directional requests within the System |  |  |
| 4 | Specify the maximum number of data sets supported by the system, and what the requirements or limitations are if additional data sets are needed in the future |  |  |
| 5 | Explain the criteria for identifying data sets within the IVR System |  |  |
| 6 | The administrator shall have the ability to delete data sets within the IVR System |  |  |
| 7 | Processes for incorporating new schedule data into the IVR System must be manually initiated by the IVR administrator. The process of incorporating that data is the build process |  |  |
| 8 | The administrator must be able to specify the data set to be incorporated into the IVR System. Contractor must indicate the criteria and process for identifying required source data when new transit data becomes available |  |  |
| 9 | When new transit data is available in the source system, and identified by the administrator for a build, the IVR System shall provide comparison of the new data with another transit schedule data set in the IVR System. Differences between the two shall be clearly indicated so that the administrator can identify key changes at a glance. |  |  |
| 10 | Identify the default report format for data comparisons and what multiple formats are available |  |  |
| 11 | Identify printing options for data change information  |  |  |
| 12 | Specify any configurable parameters that govern data change comparisons and when and how the parameters are set |  |  |
| 13 | Specify how the administrator can make specific data changes or additions within any data set |  |  |
| 14 | Backups to tape and/or to network back up media must be able to be made on the fly |  |  |
| 15 | Other |  |  |
|  |  |  |  |
| F | **SPECIAL FEATURES** |  |  |
| 1 | Specify options to |  |  |
|  | i. utilize default route vocabulary |  |  |
|  | ii. manually override route vocabulary |  |  |
|  | iii. automate route vocabulary based on transit criteria |  |  |
| 2 | Specify any additional maintenance impacts and costs for the above options |  |  |
| 3 | Other |  |  |
|  |  |  |  |
| G | **USAGE DATA COLLECTION AND REPORTING** |  |  |
| 1 | Describe the report engine and/or toolset used to generate reports |  |  |
| 2 | The system must be able to track call time in queue |  |  |
| 3 | Reporting: |  |  |
|  | 1. Number of calls made
 |  |  |
|  | 1. Number of failed calls
 |  |  |
|  | 1. Number of calls answered
 |  |  |
|  | 1. Daily call count
 |  |  |
|  | 1. Call duration by day and hour
 |  |  |
|  | 1. Other
 |   |  |
| 4 | All reports must be accessible by client name or destination, referencing certain date or time range, in detail or summary report form |  |  |
| 5 | Describe how the system meets the following desired reporting features: |  |  |
|  | 1. Selectable reporting periods
 |  |  |
|  | 1. Usage detail
 |  |  |
|  | 1. Automatic generation
 |  |  |
|  | 1. Report archival
 |  |  |
|  | 1. Security access to reporting features
 |  |  |
| 6 | Other |  |  |
|  |  |  |  |
| **H** | **ADA ACCESSIBILITY FOR STAFF** |  |  |
| 1 | Adjust fonts on the display |  |  |
| 2 | Call volume adjustments |  |  |
| 3 | Hands free |  |  |
| 4 | Visual impairment accommodations |  |  |
| 5 | Messages delivered from the system to the user via telephone, internet and or telephone devices for the deaf TDD/711 |  |  |
| 6 | Other |  |  |
|  |  |  |  |
| **I** | **CUSTOMER INTERFACE** |  |  |
| 1 | They system must be designed for access by customers with a wide range of abilities, including individuals who are blind or have low vision, are deaf or hard of hearing, have developmental or learning disabilities, slower response times, etc. |  |  |
| 2 | The system must include voice prompts that allow customer to respond by phone touch tone key or voice response |  |  |
| 3 | Complies with the Americans with Disabilities Act of 1990 Title II as it pertains to State and Local Government Activities and to Public Transportation |  |  |
| 4 | Complies with the Rehabilitation Act of 1973, Section 504 |  |  |
| 5 | Complies with the Communications Act of 1934, Sections 255 and 251(a)(2), as amended by the Telecommunications Act of 1996 |  |  |
| 6 | Voice menu will provide access to the system 24 x 7 |  |  |
| 7 | TDD capabilities |  |  |
| 8 | Describe translation services available |  |  |
| 9 | Allows caller to transfer to an agent or return to the main IVR without calling back. |  |  |
| 10 | Able to produce a Call Back Summary report |  |  |
| 11 | The system must allow for callers to use the keypad to input all required information, including dates, times, client identification, booking identification, passwords, etc. |  |  |
| 12 | Passengers cannot book trips that they otherwise would not be able to book through reservations, such as same day trips) |  |  |
| 13 | Passengers should be able to request one or more additional passengers to accompany them by selecting from a list of passenger types such as companion, personal care attendant, etc. |  |  |
| 14 | Passengers should be able to request space types, wheelchair, ambulatory, etc. |  |  |
| 15 | The IVR system should present callers with a summary of their trip information, including date and time of travel, origin and destination, fare, etc. |  |  |
| 16 | Other |  |  |
|  |  |  |  |
| **J** | **CUSTOMER SERVICE OFFICE** |  |  |
| 1 | The IVR system shall handle transfers to reservations/dispatch: |  |  |
|  | 1. Office Closed. When a transfer is initiated by a caller when the STRIDE office is scheduled to be closed, the IVR System shall provide an informational message, specific to that office, to that collar, and then return the caller to the first level of the IVR System voice menu.
 |  |  |
|  | 1. Transfer Caller. When a transfer request to the reservations/dispatch is initiated by a caller during scheduled open hours, the IVR System shall transfer the caller if an agent or queue space is available.
 |  |  |
|  | 1. Retain Caller. When a transfer request to the reservation/dispatch during STRIDE scheduled open hours when reservation/dispatch agents are busy and the phone queue is full, the IVR system shall detect the queue busy condition, hold the call, announce the situation and provide IVR menu options for automated assistance. If the Proposed System does not provide this feature, the Respondent shall describe how such calls are managed.
 |  |  |
| 2 | Other |  |  |
|  |  |  |  |
| **K** | **INSTALLATION** |  |  |
| 1 | Provide key activities for Installation |  |  |
| 2 | Existing Network Assessment |  |  |
|  | i. Station reviews |  |  |
|  | ii. Database preparation |  |  |
|  | iii. original programming initialization |  |  |
|  | iv. Adjust all equipment to manufacturer’s recommendations |  |  |
| 3 | Other |  |  |
|  |  |  |  |
| **L** | **IMPLEMENTATION** |  |  |
| 1 | Provide key activities required for the implementation of the new system |  |  |
| 2 | No telephone service interruption |  |  |
| 3 | No interim changes to dialing procedures |  |  |
| 4 | No perceived degradation in the quality of the service |  |  |
| 5 | Does vendor provide a test environment? |  |  |
| 6 | Test Voice menus for internal and external users |  |  |
| 7 | Test messages for internal and external users |  |  |
| 8 | Adjust all equipment to operate with applicable manufacturer’s recommendations |  |  |
| 9 | Other |  |  |
|  |  |  |  |
| **M** | **TRAINING** |  |  |
| 1 | Describe the Training plan, train the end user or train the trainer |  |  |
| 2 | End user training tailored to DTA requirements |  |  |
|  |  i. Console Operator |  |  |
|  |  ii. Dispatch Center |  |  |
|  | iii. Standard user |  |  |
| 3 | Troubleshooting procedures |  |  |
| 4 | Other |  |  |
|  |  |  |  |
| **N** | **REPAIR PROCEDURES AND RESPONSES** |  |  |
| 1 | Describe procedures to report issues |  |  |
| 2 | Describe response time for issues, e.g., no more than 4 hours for all major system outages, 24 hours for other issues |  |  |
| 3 | Define what is considered a major failure for the proposed system |  |  |
| 4 | Define what is considered a minor failure for the proposed system |  |  |
| 5 | Describe the major hardware required for the system and the amount of time required to acquire replacements in the event of a catastrophic failure |  |  |
| 6 | Describe the major software required for the system and the amount of recovery time required in the event of a catastrophic failure |  |  |
| 7 | Other |  |  |
|  |  |  |  |
| **O** | **SOFTWARE** |  |  |
| 1 | Describe the software upgrade process and the impacts to DTA operations |  |  |
| 2 | Describe the method for prevention and correction of system defects, including software defects, hardware defects, reporting of defects |  |  |
| 3 | Describe the training process for software and hardware updates |  |  |
| 4 | Describe how customized software code changes are re-addressed if the software is upgraded |  |  |
| 5 | Describe how the user’s configuration can be performed by the customer and is capable of being provided to new software releases |  |  |
| 6 | Other |  |  |
|  |  |  |  |
| **P** | **Warranty: Provide a summary of warranty provisions related to the project. Do not just reference a warranty document.** |  |  |
| 1 | Describe warranty provisions for any hardware that is provided for the system, including defective parts |  |  |
| 2 | Describe warranty provisions for any software that is provided for the system |  |  |
| 3 | Describe warranty provisions for workmanship |  |  |
| 4 | Provide a copy of the warranty document at time of Proposal submission |  |  |
| 5 | Other |  |  |
|  |  |  |  |
| **Q** | **CLOUD-BASED SOLUTIONS** |  |  |
| 1 | Please provide the location of computing and data storage devices |  |  |
| 2 | Please provide the base data storage capacity for the proposed Solution |  |  |
| 3 | Please provide costs to upgrade the storage capacity |  |  |
| 4 | Please provide a summary of your uptime requirements |  |  |
| 5 | Please confirm that your firm has a Disaster Recovery Plan and is willing to provide a copy of it to the DTA upon request  |  |  |
| 6 | Other |  |  |
|  |  |  |  |
| **R** | **OTHER** |  |  |
| 1 | Please provide any other information on the Proposed System that was not included previously |  |  |