

Museum Enterprise System RFP Submission Analysis

	Detailed System Requirements
5.2	Overall Museum Enterprise System
5.2.1	General System - Required
a	Open Architecture
b	Compatible with Windows applications - Windows 10 compatible
c	SQL Server - Server should be 2012 but upgradeable to 2016
d	User-friendly
e	Will process customers quickly and efficiently; including fast and user friendly "cash registers" or other
f	Flexible, customizable, adaptable
g	Available for full support and maintenance, 24/7
h	Provide bilingual service in both official languages (French and English) to the customer on the front end (customer receipts, web pages, etc.)
i	Provide bilingual access in both official languages (English and French) for CMHR employees who are operating systems
j	Meets Web Accessibility Guidelines (WAG) 2.0 http://www.w3.org/WAI/intro/wcag.php
k	Payment Card Industry (PCI) compliant
l	Compliant with Canada's privacy laws regarding safekeeping of private information
m	Strong reporting function – relevant, informative canned reports and ability to generate custom reports (using, for instance, Crystal reports). Reports can be exported to excel, or as a pdf, as a direct email, or other.
n	Utilizes multiple security access levels enabled by individual user codes which can be managed, tracked, monitored, and audited. These should be simple to setup.
o	Supplier has a proven track record, with good references, preferably from within the museum, attractions, or tourism sector; and, from users within Canada
p	Supplier has a proven track record of integration to other systems, particularly financial systems (Microsoft Dynamics AX) including AP, GL, AR, etc.
q	Minimum impact from software updates
r	Ability to customize and reinforce the CMHR brand identity on kiosks, screens, customer receipts, ticket stock, etc.
s	Terminal Access to the System - The Ability to install on one remote server but have multiple users access system
5.2.2	General System - Desired
a	Available for full support and maintenance via 1-800 #
b	Available for full support and maintenance in both official languages: English and French
c	Bilingual capabilities on the back end for staff use
d	Is supported by User Groups that meet regularly
e	Onsite training to be delivered by system provider(s) with installation
f	For all web based capacity, the ability to accommodate CMHR single user sign on with single password, using the same credentials as the CMHR website (to be defined by CMHR)
g	Systems reside as one window on a user desktop that is sizeable, enabling service staff to multi-task on different systems including email accounts and Microsoft office systems
h	Please indicate whether support is provided by your own staff or those working on a contract basis or if support is delivered via a 3 rd party.
i	Please indicate location of head offices for support
j	Please indicate "regular working hours" for support and provide pricing based on regular working hours support as well as cost for additional support 24/7 if required.
k	Please indicate whether system operates from a data dictionary, text dictionary, or other.
l	Please indicate the timed synchronicity (every 4 hours, 5 minutes, 30 seconds, etc.) of any "integrations" including web integrations

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J	Online support through forums or knowledgebase
5.3	Ticketing Systems
5.3.1	Individual Ticketing System - Required
a	Ticketing Point of Sale and back end management system
b	Ticket/PLU creation, selling, and printing is a seamless, quick, and effective process using existing hardware (Epson and BOCA printers)
c	Capacity to sell and manage General Admission, Reserved Seating , Timed Ticketing, Event and Program sales and <u>registration</u> where occupancy is limited and defined.
d	Capacity to manage event and program sales and registration even where there is no fee attached .
e	Capacity to sell, renew and upgrade a variety of membership types across a broad range of categories at regular rates, renewal rates, discounted rates
f	No agency fees
g	Accommodates a robust selection of items, events, program options, ticket categories and types
h	Option to "package" items for "families" or "multiple events" etc.
i	Accepts all tender types including cash, debit, major credit cards, gift certificates, gift cards.
j	Ability to handle and accept special promotions, promotional codes, coupons, discounts, etc.
k	Must be able to recognize, validate, and accept all types of CMHR Membership cards; ideally through full membership integration in the system
l	Generates bar-coded or other unique and identifiable "ticket stock" (ie – ticket printing, and/or pda image code)
m	Manage admissions and occupancy (i.e. through the use of wireless mobile battery operated scanners
n	Options for use by 3 rd party agencies and ticket seller; manages and tracks ticket distribution to 3 rd party vendors (hotels, tour operators, etc.) as well as redemption of same
o	POS ability to take deposits, pre-payment, and to invoice (AR module or capacity; for integration to CMHR Financial Systems: Microsoft Dynamics AX)
p	Accurate reporting function on both sales and admissions with customization options based on broad range of metrics without having to be a SQL expert
q	The "back end" of the POS system is intuitive, user friendly and allows to make changes on the "fly". The POS system should have defined steps and clear procedures which are documented and provided by the developer for operator usage.
r	Ablity to customize the back end (simplifying viewing options by hiding tabs that are not in use/needed)
s	Ability to generate automatic, timed reporting where daily, monthly and other time sensitive reports would generate themselves.
5.3.2	Individual Ticketing System: Desired
a	Capacity to sell "subscription" based tickets (season's passes, etc.) and renewable subscriptions
b	Can accommodate a proposed system for "energy exchange" (free entry in return for ...)
c	Can be adapted to rent or take deposits on accompanying systems (headsets, smartphones, wheelchairs, strollers, etc.), with inventory management system
d	Packaging options with retail and/or food & beverage and/or parking etc. with each charge being split out by GL code
e	Scanned exit and exit tracking, but not by turnstile
f	Option to accept donations, with or without the purchase of membership
g	Option for Kiosks to accept donations or to be multi-purposed
h	Option for order fulfillment of Membership Sales at the Ticketing Desk
i	A system to track staff time on either the ticketing system or the ticketing kiosks
j	A system to track volunteer time on the ticketing kiosks
k	Wireless mobile ticketing POS for line-busting, or for out of doors or remote events, or for boarding tour buses, etc., with printer capacity (for receipts, if not tickets)

	Detailed System Requirements
l	Self-service tickets kiosks with integrated sales to the main system. Self-service kiosks should accommodate purchase of admission tickets, pick up of tickets purchased through on online order, purchase of event or program tickets, pick up tickets placed through a call center, purchase packaged tickets, purchase or renew memberships
m	A true CRM module that allows for better data harvesting and gives us a list of customers, know when they came in, for what tour or event etc.
5.3.3 Group Ticketing System	
a	CMHR will have two entrances for ticketing: The main entry for individual ticket sales. and the group entry for pre-arranged school programs and group tours. The ticketing system must be able to accommodate group sales functionality. All school program and group tour ticket sales will be pre- scheduled, but payment may be processed at the time of group arrival.
b	Since capacity for general admission may be affected by group sales and admissions, the ticketing system must be able to handle both aspects as part of a whole.
c	School program and group sales bookings will be processed through the Groups/Rentals Booking system and this system must be wholly integrated to the Ticketing System.
5.3.4 Group Ticketing System - Required	
a	Group sales and ticketing where one receipt is issued for a group of individuals
b	Group invoicing (see reference to AR module or capacity above)
c	Must be fully integrated to the Rentals/Groups booking system
d	Generates bar-coded "group ticket" (one item) (see below)
e	Order entry functionality must be well connected to POS. System must allow for tickets to be returned from an order entry. Returns must be viewable in existing order entries.
5.3.5 Group Ticketing System : Desired	
a	Option to set up accounts "on the fly"
b	Option for one bar-coded ticket to identify # of group members being admitted, in order to track occupancy (not every member of the group would require their own ticket)
5.3.6 Integrated Web-Based E-Commerce Ticketing System - Required	
a	Customer-friendly, fast and accurate Ticketing E-Commerce
b	For general admission, timed ticketing, reserved seating and event & program sales and registration where capacity is limited and defined (including where no fee is attached)
c	Flexible "combination ticket sales" option
d	Real time internet sales; fully integrated, real-time solution with main ticketing system for managing sales occupancy
e	Shared inventory with main database (no manual allocation)
f	Offering same range of product and service levels as the main CMHR Ticketing systems
g	Can accommodate custom rules and regulations restricting sales, especially for program participation (e.g. – age, membership, teachers only, etc.)
h	Ability to capture customizable customer information online including optional and required information, especially as it pertains to program registration
i	Options for secure print at home, or pick up (at CMHR ticket desk or other) or print at CMHR kiosk or emailing to smart phone or mail-out with bar-code technology as above
j	Options for use by 3 rd party agencies and ticket sellers
k	Customizable text and graphics in order to seamlessly present the Ticketing E-Commerce as part of the greater CMHR website
5.3.7 Integrated Web-Based E-Commerce Ticketing System: Desired	
a	Integrated to CMHR Membership data base for automatic discounting
b	Options to feature targeted online promotions, discounts or pricing strategies including additional customizable (automated) fees such as shipping fees, etc.

	Detailed System Requirements
c	Can accommodate online redemption of gift certificates, gift cards, credit notes, coupons, promotional codes, etc.
d	Option to add on surveying component
e	Option to embed additional elements to the webpages, including video etc. (HTML interface)
f	Option to sell subscriptions, including renewable subscriptions
g	Option for online refunds, cancellations or exchanges
5.4 Membership Sales and Service	
5.4.1 Membership Sales, Database and Management System - Required	
a	Fully integrated Membership system that can be integrated to Retail (CounterPoint) & possible Facility Rentals and Restaurant Services in order to: <ul style="list-style-type: none"> · validate membership details for sales discounts (a primary benefit of membership) · validate membership details for museum access (free admission is a primary benefit of membership) · sell and issue full (not temporary) memberships at the ticket desk and through retail avenues
b	For established integrations, please indicate "real time" or "batch up-dates."
c	Includes online options for: <ul style="list-style-type: none"> · Membership purchase, renewal and upgrade · Change of address, name, etc. · Corporate members to manage and maintain the membership details of their employees
d	Issues permanent "bar-coded membership cards" (print or electronic) instantly at Point of Sale
e	"Membership cards" (print or electronic) may be scanned and integrated in real time to ticket verification systems at the entrance ways to galleries, at the retail store, etc. (or indicate time differential)
f	Allows for sophisticated and customized marketing and direct marketing to members.
g	Captures relevant in depth customer information to enabled a customized and personalized visitor service experience
h	Has robust report-generating capabilities, including ability to generate customized reports (e.g. – utilizes Crystal reports)
i	Incorporates a roving membership sales system (hand-held technology or other) that allows staff to sell and renew memberships from any location in and around the Museum, while connected via WiFi and to the central membership database (for example, PC tablets that might process address verification, real-time credit card authorization, bar code reading of existing membership cards and printing of receipts on a mobile printer)
j	Includes or can be integrated with an automated address correction solution to address common misspellings and verify postal codes
k	Robust tracking (such as visitation history including when they visit, how long they stay, number of visits per year, purchasing history)
l	Customizable – e.g. apply benefits to targeted member categories based on age, type of membership, place of membership, etc.
m	Track members for expiry and renewal dates
n	Accepts donations online, probably to be integrated with the Friends' Systems, where donations can be designated as tribute gifts (i.e. in honour of or in memory of); and/or, where donations can be designated for allocation to a specific purpose (i.e. Capital Contributions, Educational Programs, Operating Endowment, etc.)
o	Ability to offer and track discounts with purchase (IE 10% off, tour voucher) and tracking of other purchases
p	Ability to search for members from a variety of fields (not only by name)
q	Mail merge functionality
5.5 Facility Rentals and Events Management	
5.5.1 Facility Rentals and Events Management - Required	
a	Booking functionality
b	Sales and invoicing functionality

Detailed System Requirements	
c	AR functions
d	Can be integrated to CMHR Financial systems (Microsoft Dynamics AX)
e	Manage the entire booking process, from initial enquiry to issuance of final client invoices. Some event coordination functionality (reminders, notes, planning, scheduling, etc.)
f	Include some event coordination functionality – i.e.: tools to assist CMHR staff with reminders, notes, task lists, flags for follow-up, etc.
g	A robust, highly flexible and customizable solution to manage multiple rules, room configurations and access options, program attributes, and priority settings, such as: <ul style="list-style-type: none"> • A variety of space configuration and set-up options • Resources attached to space and/or function (i.e.: equipment, furnishings, A/V, personnel scheduling, etc.) • Variable pricing structure for various scenarios (i.e.: seasonal variations, “day of the week” variations, etc.) • Rates and prices subject to over-ride • Ability to block out or close days
h	Manage space bookings on a relational basis (i.e.: large spaces cannot be booked if a smaller space within the larger area is already booked; more than one space can be booked at the same time, by the same client, under the same Rental Agreement)
i	Provide a unified and consistent set of event planning and resource management processes and tools for all museum events (internal and external bookings, related to program delivery, client rentals, and administrative business requirements) whenever space, equipment and staffing resources are required
j	Manage recurring Events and Programs
k	Manage Customer profiles, which could be customizable to note a variety of attributes such as: <ul style="list-style-type: none"> • for Schools - link individual teachers or instructors and/or individual programs and/or student rosters with attributes such as food allergies, medication, t-shirt, size, arriving by...etc.) • for Private Functions – note “VIP” guest lists, food allergies, special needs and client requirements.
l	Enables CMHR staff who are non-core users of the system to book meeting rooms and equipment independently, but in collaboration with the core systems users in the CMHR Visitor Services/Earned Revenue Department.
m	Create and enable a customizable Events and Booking Calendar and Calendar Share that provides visibility (filtered as required) of events for both staff and visitors – an accurate, up-to date advance posting and archive record of all events and bookings in all rental spaces within the museum
n	AR functions that would include ability to generate invoices, account statements, and summary reports
o	Can export invoices, statements and other correspondence (such as confirmation emails) via quick email integration (not cut and paste)
p	Trace booking system to highlight when payments are to be collected
q	Private and public event functionality that allows for web-based ticket sales of public events while not uploading private event information
r	Ability to adjust pricing after tickets are issued/printed/used
s	Ability to accommodate membership, i.e.: to recognize and validate bar-coded cards to automatically assign relevant discounts and membership benefits, etc.
5.5.2 Facility Rentals and Events Management – Desired	
a	A calendar, for shared viewing (by staff and/or the public), ideally for on-line and other viewing as well (smart phones, public monitors) with the ability to export the online calendar to “Outlook”.
b	On-line visual mapping of spaces with the ability to include photos with various set up options
c	Possible integration to Museum Restaurant system (not owned by CMHR) to coordinate food and beverage service.
5.6 Retail, Inventory Management and E-Commerce systems	
a	Bilingual systems, or allows for sufficient characters for bilingual product descriptors, receipt messaging, etc.
b	Full integration to CMHR Boutique system (CounterPoint) including membership database
c	Discounts, including member discounts, are printed on customer receipt