



VoIP– Setting a system standard

RFP 12-1966

Metro Information Services Department

600 NE Grand Ave.
Portland, OR 97232
503-797-1700

Project Manager

Jeff Booth
jeff.booth@oregonmetro.gov
503.797.1603

Procurement Analyst

Sharon Stiffler, CPPB
sharon.stiffler@oregonmetro.gov
503-797-1613

Notice is hereby given that proposals for RFP 12-1966 for *VoIP – Setting a system standard*, shall be received by Metro, 600 NE Grand Avenue, Portland OR 97232 until close of business on August 19, 2011. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. All late Proposals shall be rejected. Proposers shall review all instructions and contract terms and conditions.

Request for Proposals (RFP 12-1966)

I. INTRODUCTION

The Information Services Department of Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 NE Grand Avenue, Portland, OR 97232-2736, is requesting proposals for *VoIP – Setting a system standard*. Proposals will be due as indicated on the RFP cover page.

Details concerning the project and proposal are contained in this document.

II. BACKGROUND/HISTORY OF PROJECT

Metro is an elected regional government that serves more than 1.5 million residents in Clackamas, Multnomah, and Washington counties and the 25 cities in the Portland region. Metro is the only regional government agency in the U.S. whose governing body is directly elected by the region's voters. Metro's primary responsibility is regional land use planning. However, the Metro charter also recognizes the significant role Metro has in other regional issues such as solid waste disposal, and the operation and development of regional recreation and visitor facilities such as the Oregon Zoo, the Oregon Convention Center and regional parks and open spaces.

Metro Facilities

Metro facilities are geographically dispersed across the region and reflect its wide range of responsibilities. They range in size from Metro's regional headquarters near downtown Portland to field offices such as Oxbow and Blue Lake Parks located in the suburban and remote rural areas of the Metro region. Other facilities such as the Oregon Zoo and the Portland Center for the Performing Arts consist of multiple buildings in a campus-like setting. Figure 1 displays the location of Metro facilities. Table 1 lists Metro facilities and their addresses. Here is a brief description of each:

Metro Regional Center (MRC) - The primary office for Metro is located at the Metro Regional Center. This site houses the core servers for the organization and is the hub for the other offices. The core switch is PoE, the access switches are non-PoE, with CAT5 cabling throughout. Within the MRC building has data and voice services terminating into separate locations.

Oregon Zoo (ZOO) – The core of the network resides in the Commissary Building. Fiber cabling extends from the core to each of the remote buildings with a Gig backbone. Most remote buildings have been installed with category 5e cabling which is currently being used to support both voice and data services.

Oregon Convention Center (OCC) – The core of OCC is located in the original part of the building. There are seventeen communications closets connected to the core. Each closet is supported by multiple strands of fiber optic cable running back to the communications center. The closets feed the exhibit halls using CAT5 and CAT6.

Expo Center (EXPO) – Like OCC the Expo has a centralized communications center with fiber optic cabling and multi-pair phone cabling running between most buildings. The newer buildings, including the administrative offices, are mostly category 5 cabling. Some of the older buildings have category 3.

Portland Center for the Performing Arts (PCPA) – PCPA consists of three buildings: Antoinette Hatfield Hall, Arlene Schnitzer Concert Hall and Keller Auditorium.

Antoinette Hatfield Hall (AHH) – The network infrastructure at this facility has newer PoE switches, a Gig network backbone and a mixture of CAT 5 and CAT5e cabling extending to the offices.

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Keller Auditorium (KA) - The second largest site in this group has a network infrastructure consisting of a few non-PoE switches and the core switch being a PoE one. The building has a mixture of CAT 5 and Cat5 cabling throughout.

Arlene Schnitzer Concert Hall (ASCH) – is the smallest user of resources of the three sites in this group. Like the other two sites, the ASCH facility sells internet access to its customers and has DSL circuits to support that effort. Analog phone service is extended and billed from the AHH facility. Currently, there is only CAT5 connection from Hatfield Hall to ASCH with plans to install a fiber link from the AHH fiber shelf to a new fiber shelf at the Schnitzer, complete with gigabit PoE switch like other locations. Inside the Schnitzer, as with the other venues, there is a mix of CAT5 and CAT5e. Except for one POTS line, the phone lines in the Schnitzer are extended via a 100 pair tie line from the MDF at the Schnitzer to the MDF in the AHH.

Metro Central Transfer Station (MCS) – The Central Transfer Station consists of six buildings at this facility. The network core for the facility is located in the administration office building while the telephone network extends out from the contractor's office. There are also four scale house buildings at this site that are connected by Gig fiber backbone.

Metro South Transfer Station (MSS) – The South transfer station is similar to the Central Transfer station in its voice and data infrastructure. However, this site does not have administrative offices so all of the services terminate at the Scale House A building.

St Johns Landfill (SJLF) – The St. Johns Landfill has an integrated T1 which provides twenty channels dedicated to data services and only four channels for voice services. The four voice lines connect to a small key system PBX which is located in the bay area of the St. Johns building.

Latex (LTX) - The Latex facility has a VoIP implementation. This site has an open source VoIP PBX software application called Asterisk. There are four business lines into the Asterisk server providing inbound and outbound calling services. Polycom VoIP phones have been deployed throughout the site.

Oxbow Regional Park (OXB) – Oxbow Regional Park is made up of four separate buildings. Services are delivered to this site by an integrated T1 with five dedicated channels for voice traffic and nineteen channels allocated for data. The T1 enters the facility at the main office building. The site does not have a PBX. The five voice channels cross connect to four standard analog phone sets and one fax machine.

Blue Lake Park (BLP) – This site has a Cisco small business VoIP solution. There are four business lines providing inbound and outbound calling services. There are four IP phones in the main office and one IP phone in the maintenance building. A wireless bridge connects the main office and the maintenance building.

Borland Facility (BOR) - The Borland facility consists of two buildings, the office and the barn. There are two plain old telephone (POTS) one for an analog phone and the other for a fax machine. The main phone line is physically cabled so that phones in both the office and the barn will ring simultaneously.

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Voice and Data Network

Figure 2 provides an overview of both Metro's data and telephone networks. Each facility is portrayed with its connectivity to the public switched telephone network (PSTN) and to Metro's data network. Figure 3 portrays the implementation of Metro's wide area network. The configuration of the local area network at each Metro facility is diagrammed in Appendix A. Table 1 lists the telephone systems at each facility.

Metro's telephone system is shaped by Metro's history during which many functions and facilities were received by Metro from other governments. This occurred in an environment lacking Metro-wide governance over data and telephony. The result is:

- o A heterogeneous environment without an overarching architecture or plan,
- o Equipment not positioned for advances in technology, and
- o Separate, duplicative administration of data and telephone systems.

Now, as aging equipment comes to the end of its useful life and new facilities are brought on-line in response to changing program needs, Metro is faced with the prospect of piecemeal equipment purchases that run the risk of perpetuating the status quo and not realizing the benefit of advances in convergent voice and data technologies.



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Table 1 – Metro Facilities

	Full Name	Address	PBX	PRI	PoTs	Users	FAX
<u>Comcast WAN</u>							
MRC	Metro Regional Center	600 NE Grand Avenue, Portland	Nortel Meridian Option 61	2	4	449	12
ZOO	Oregon Zoo	4001 SW Canyon Road, Portland	Callegra Tadiran	2	19	264	12
MSS	Metro South Transfer Station	2001 Washington, Oregon City	Nortel Norstar		11	28	2
MCS	Metro Central Transfer Station	6161 NW 61st, Portland	Nortel Norstar		14	26	2
SJLF	St John Landfill	9363 North Columbia Blvd, Portland	Key Systems		3	5	1
OCC	Oregon Convention Center	777 NE MLK Blvd, Portland	Nortel Meridian Option 61	2	2	135	10
EXPO	Metro Exposition Center	2060 North Marine Dr., Portland	Nortel Meridian Option 11	1	12	15	3
PCPA	Antoinette Hatfield Hall	1111 SW Broadway, Portland	Nortel Meridian Option 11 (master)	1	9	73	6
KA	Keller Auditorium	222 SW Clay, Portland, OR	Nortel Norstar (slave)	1	4	10	2
<u>VPN Sites</u>							
OXB	Metro Oxbow Regional Park	3010 SE Oxbow, Gresham	None		5	5	1
BLP	Metro Blue Lake Regional Park	20500 NE Marine Dr, Troutdale	Cisco CM Express		4	14	1
LTX	Oregon Zoo Condors Program	Undisclosed location near Redland, OR	None		2	2	1
Latex	Metro Latex Facility	4825 North Basin Ave, Portland	Asterisk		4	7	1
Zoo Lights	Oregon Zoo Lights		None		0	0	0
WPTS	Washington Park Train Station		None		1	1	0
BOR	Metro Borland Field Office	2661 SW Borland Rd, Tualatin OR 97062	None		2	5	1
Chinook	Metro Chinook Landing		None		0	0	0

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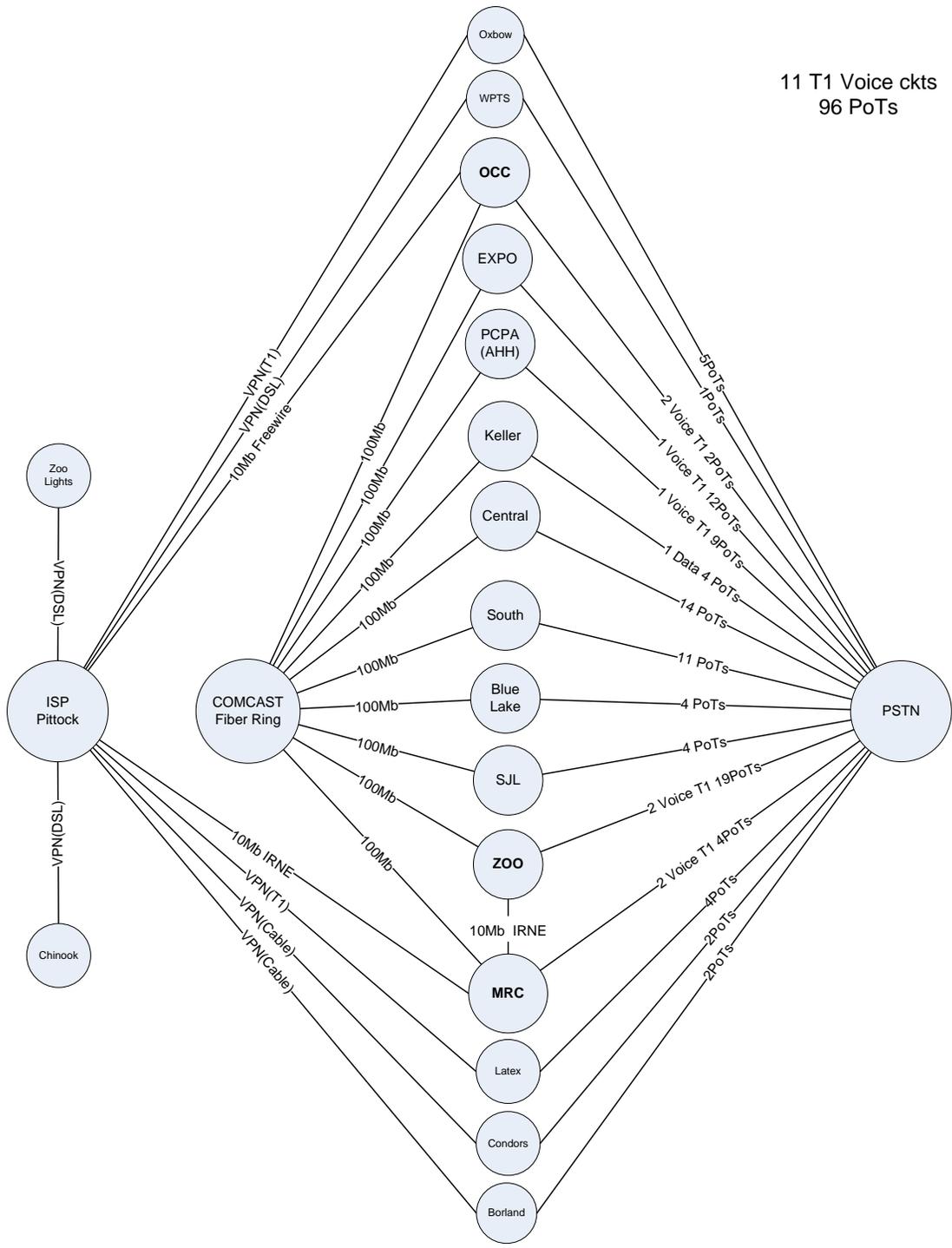


Figure 2 - Metro's voice and data networks

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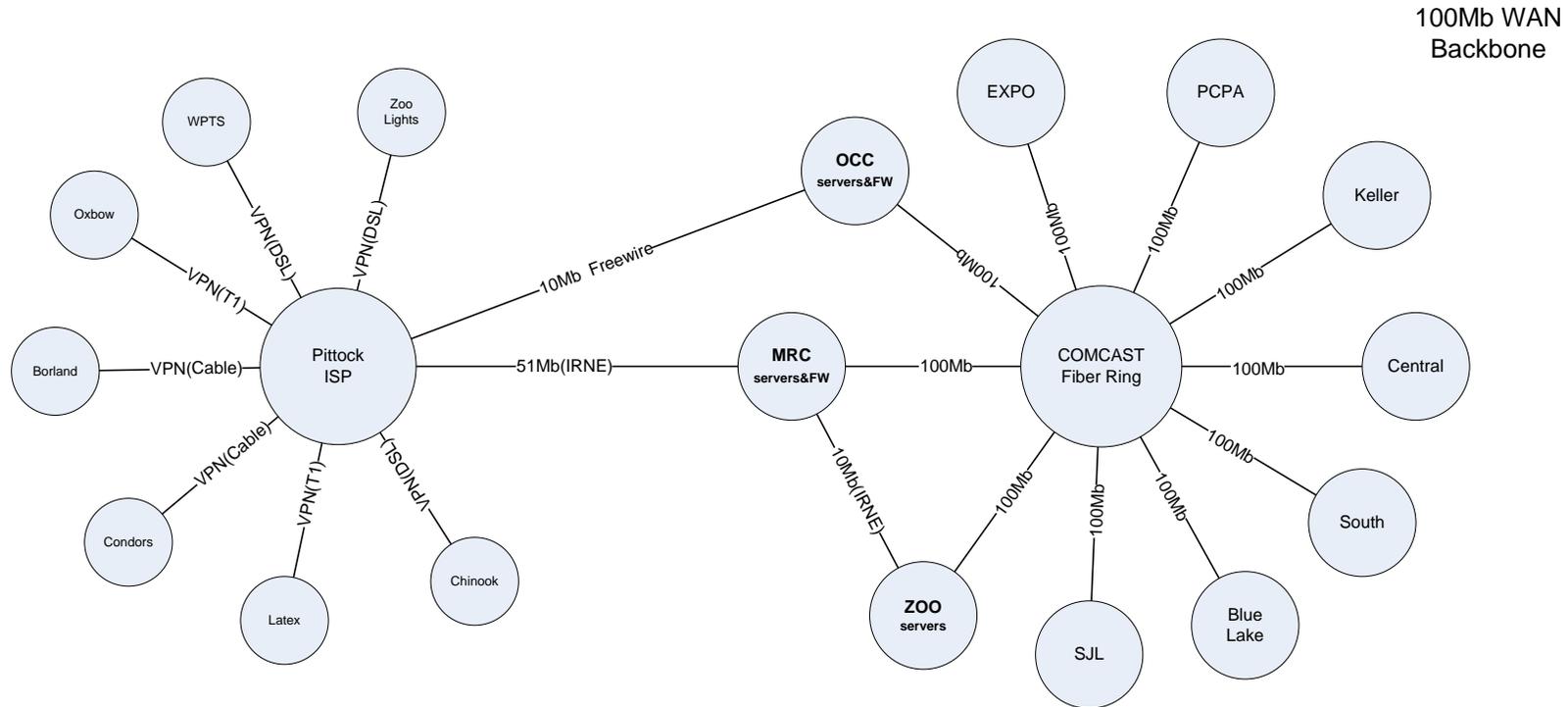


Figure 3 - Metro's Wide Area Network

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III. PROPOSED SCOPE OF WORK/SCHEDULE

The intent of this Request for Proposals to select an original equipment manufacturer (OEM) of convergent voice and data systems whose products will be adopted by Metro as a standard. This standard will be applied in subsequent requests for proposals for design and implementation of voice over internet protocol (VoIP) systems at Metro facilities.

Through this standard Metro will establish an integrated voice and data environment that:

- o Provides single point management,
- o Provides a single, internal dial plan,
- o Provides dynamic allocation of telecommunication lines,
- o Provide a uniform telecommunications architecture at all Metro facilities,
- o Accommodates changes in the number and location of users,
- o Protects Metro's investment through the vendor's commitment and ability to continuously innovate and improve its products.

Project Schedule

Request for Proposals open for response	August 2, 2011
Questions due	August 12, 2011
Proposals due	August 19, 2011
Evaluation of proposals complete	August 26, 2011
Vendor presentations and award	September 2, 2011

Metro reserves the right to adjust the schedule if deemed to be in the agency's best interests.

IV. PROPOSAL INSTRUCTIONS

A. Submission of Proposals

Proposals will be submitted as an attachment to an e-mail addressed to:

jeff.booth@oregonmetro.gov

B. Deadline: Proposals will not be considered if received after the date and time indicated on the RFP cover page.

C. RFP as Basis for Proposals

This Request for Proposals represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information which is not addressed in this RFP will not be considered by Metro in evaluating the Proposal. All questions relating to this RFP should be addressed to Sharon Stiffler, sharon.stiffler@oregonmetro.gov. Any questions which, in the opinion of Metro, warrant a written reply or RFP amendment will be furnished to all parties receiving this RFP. Metro will not respond to questions received after 3:00 pm on August 12, 2011.

D. Information Release

All Proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all Proposers agree to such activity and release Metro from all claims arising from such activity. In

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Accordance with Oregon Public Records Law (ORS 192), proposals submitted will be considered part of the public record, except to the extent they are exempted from disclosure.

E. Minority, Women and Emerging Small Business Program

In the event that any subcontracts are to be utilized in the performance of this agreement, the Proposer's attention is directed to Metro Code provisions 2.04.100, which encourages the use of minority, women and emerging small businesses (MWESB) to the maximum extent practical. Copies of these MWESB requirements are available from the Metro Procurement Office, 600 NE Grand Avenue Portland, OR 97232, and 503-797-1648.

V. PROPOSAL CONTENTS

The proposal should describe the ability of the consultant to perform the work requested, as outlined below. The proposal will be submitted electronically using Microsoft Word, Excel, Visio and/or Adobe PDF.

- A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days. (1 page)
- B. Executive Overview: Provide a summary of the proposed solution structured so that any one reading only this section would have an understanding of the proposed system. (Maximum 3 pages)
- C. Architectural Design: This section is to provide the overall architecture of the Vendor's proposed system. Proposers may present alternate design approaches.
1. Provide a diagram of the proposed system architecture in Microsoft Visio 2007 format. This must be with reference to Metro's facilities and geographical layout.
 2. Provide model names, version numbers and quantities of components of the proposed solution listed by location.
 3. *Integration with existing TDM systems* – provide a detailed description and diagram of how the proposed solution can be integrated with existing TDM PBX and handsets during the transition to a full VoIP system.
 4. *Integration with existing LAN/WAN* - provide a detailed description of how the system will integrate into the existing network infrastructure and provide end-to-end quality of service (QoS). Discuss specific protocol support requirements, network performance requirements, approach to Call Admission Control, and how LAN switches will recognize voice traffic on traffic.
 5. *Redundancy* – provide a detailed description of the proposed system's capability for seamless failover and recovery. Describe the failover procedure to include the length and nature of any service degradations, delays, and outages. Describe site's ability to continue if central site goes down.
 6. *Quality of Services* - Describe how the system manages latency, jitter and packet loss.
- D. Feature Set: Complete and include the feature set questionnaire exhibited in Appendix B of this document. Responses will indicate whether a feature is standard (STD), included as an enhancement at an additional cost (AC) or is not available (NA). The presence of comments or additional information provided on a separate is indicated by checking REF.

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- E. Vendor Profile
1. Provide a corporate overview that profiles the company's history, services and offerings, especially as it applies to converged data and voice technology. (maximum 2 pages)
 2. Describe the company's approach to research and development of its VoIP products with particular attention to how they are kept current with advances in the industry and technology. (maximum 2 pages)
 3. Provide three references for governments using the proposed system. These governments should be the size of Metro with a similar mix of geographically dispersed facilities. (1 page)
 4. Provide three resellers/system integrators that Metro may enlist for purchases, implementation, maintenance and training services locally.
- F: Implementation, maintenance and training - The proposed VoIP solution should be flexible to accommodate incremental implementation at Metro locations as funding for voice becomes available. It is expected that the VoIP solution will interface with existing TDM PBX's at Metro locations.
1. Provide a project plan for a phased implementation of the proposed solution.
 2. Provide a description of training provided to
 - a. End users
 - b. System administrators
 3. Explain the vendor's approach to:
 - a. Providing future software releases.
 - b. Providing help desk services to resolve system problems.
 - 4.
- H: Pricing
- The purpose of this RFP is to set a standard for VoIP at Metro and its sites and does not contain project specifics that would serve as the basis for a cost estimate. However, based on the information given in Table I and the voice/data schematics (Figures 1 and 2), please discuss your pricing model, including initial purchase, annual maintenance, programs for rebates, credit for existing equipment, etc. State costs for each type of phone set (IP1 – IP6) listed in *Appendix B*. All costs should be Metro's actual cost.

VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.
- B. Validity Period and Authority: The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and

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telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.

- C. Conflict of Interest. A Proposer filing a proposal thereby certifies that no officer, agent, or employee of Metro or Metro has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
- D. Equal Employment and Nondiscrimination Clause Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. Metro fully complies with Title VI of the Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, see www.oregonmetro.gov.

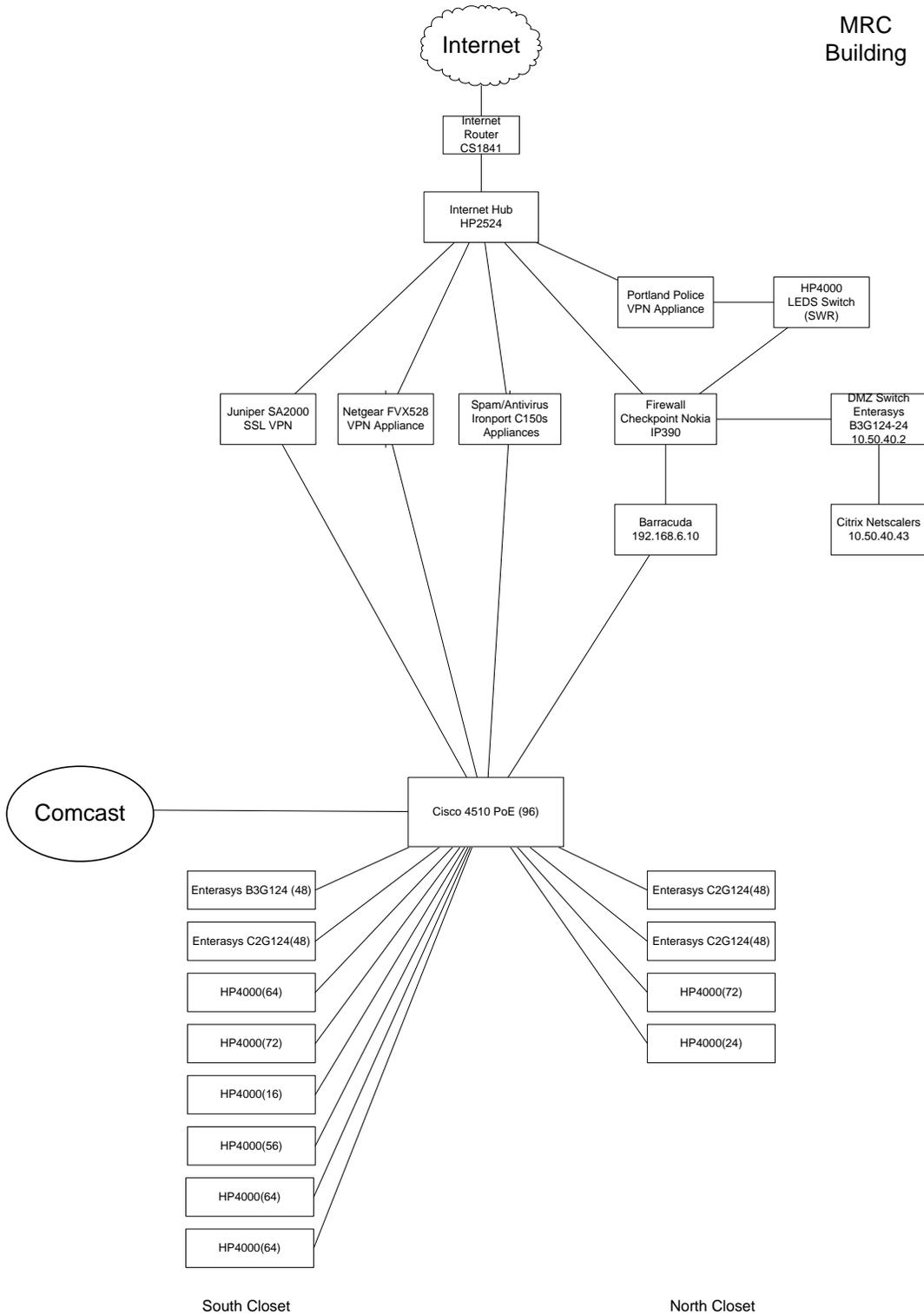
IX. EVALUATION OF PROPOSALS

- A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews may be requested prior to final selection of firm(s). The highest ranked Proposer according to the evaluation criteria will be selected as the standard.
- B. Evaluation Criteria: This section provides a description of the criteria which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.

Criteria	Percentage of total score
Architectural design	30%
Feature set	30%
Vendor strength	20%
Implementation, maintenance and training	10%
Pricing	10%
Total	100%

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Appendix A – Metro’s local area networks

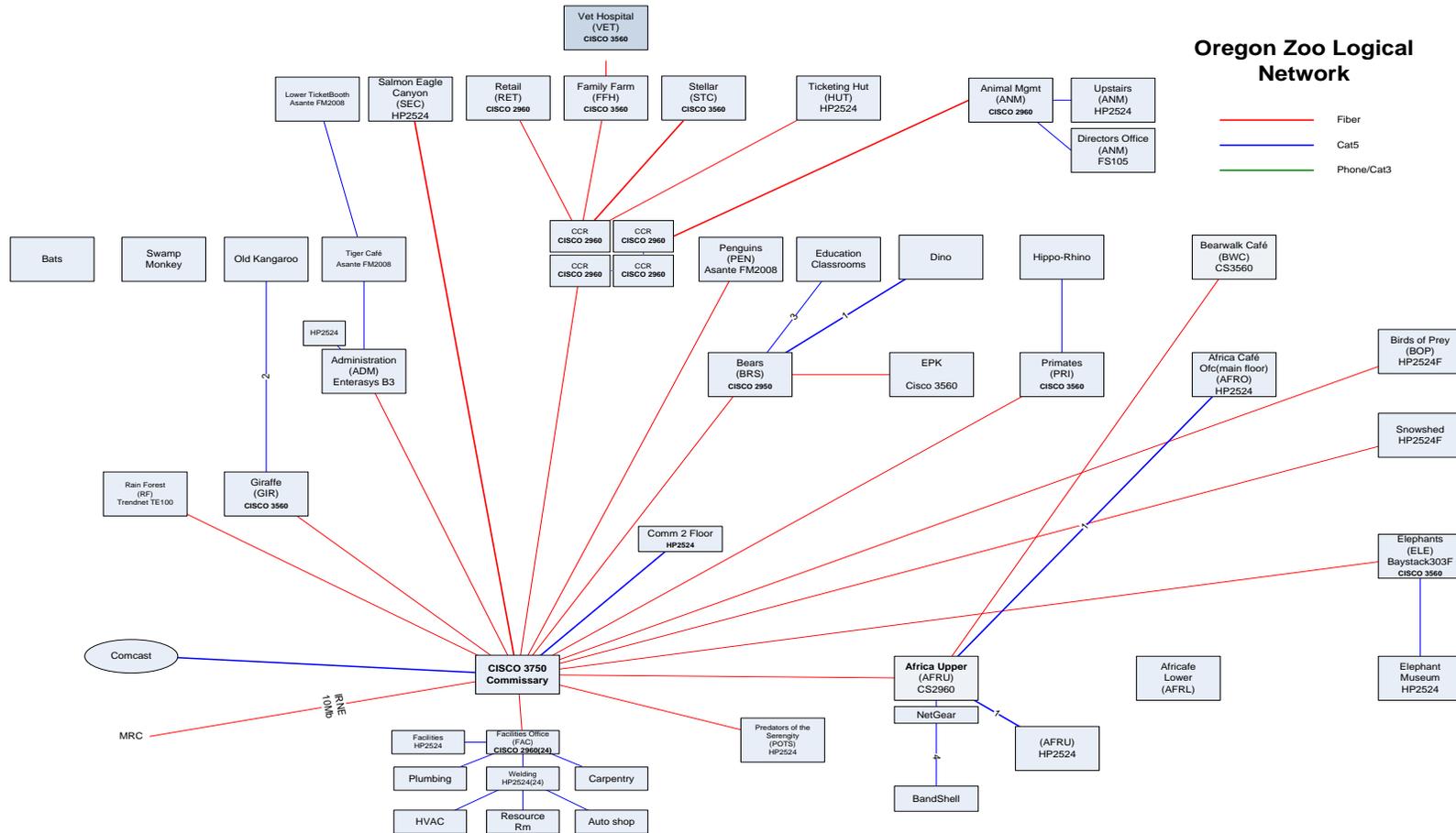


LAN Diagram 1 - Metro Regional Center



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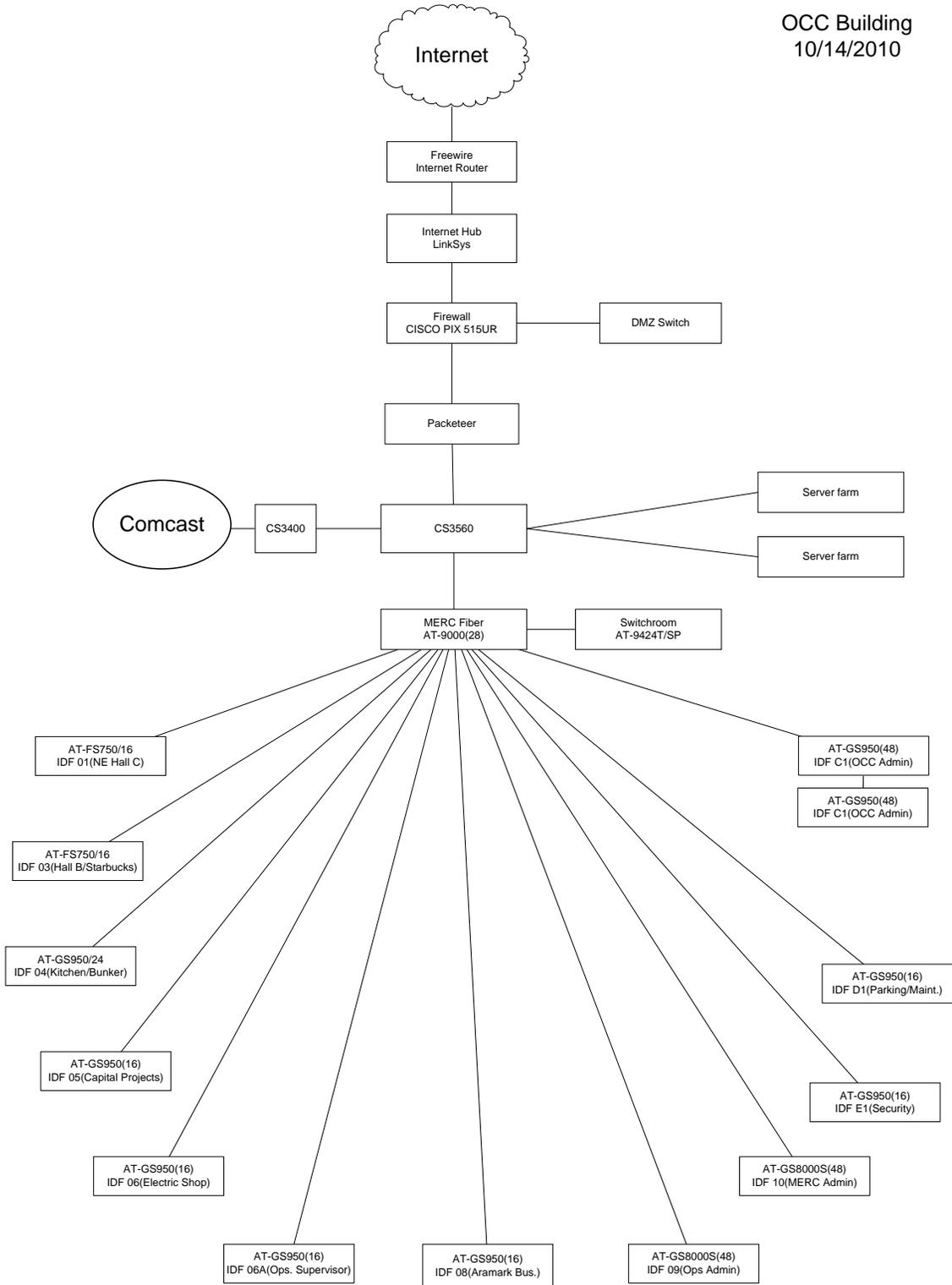
Request for Proposals (RFP 12-1966) Appendix A – Metro’s local area networks



LAN Diagram 2 - Oregon Zoo

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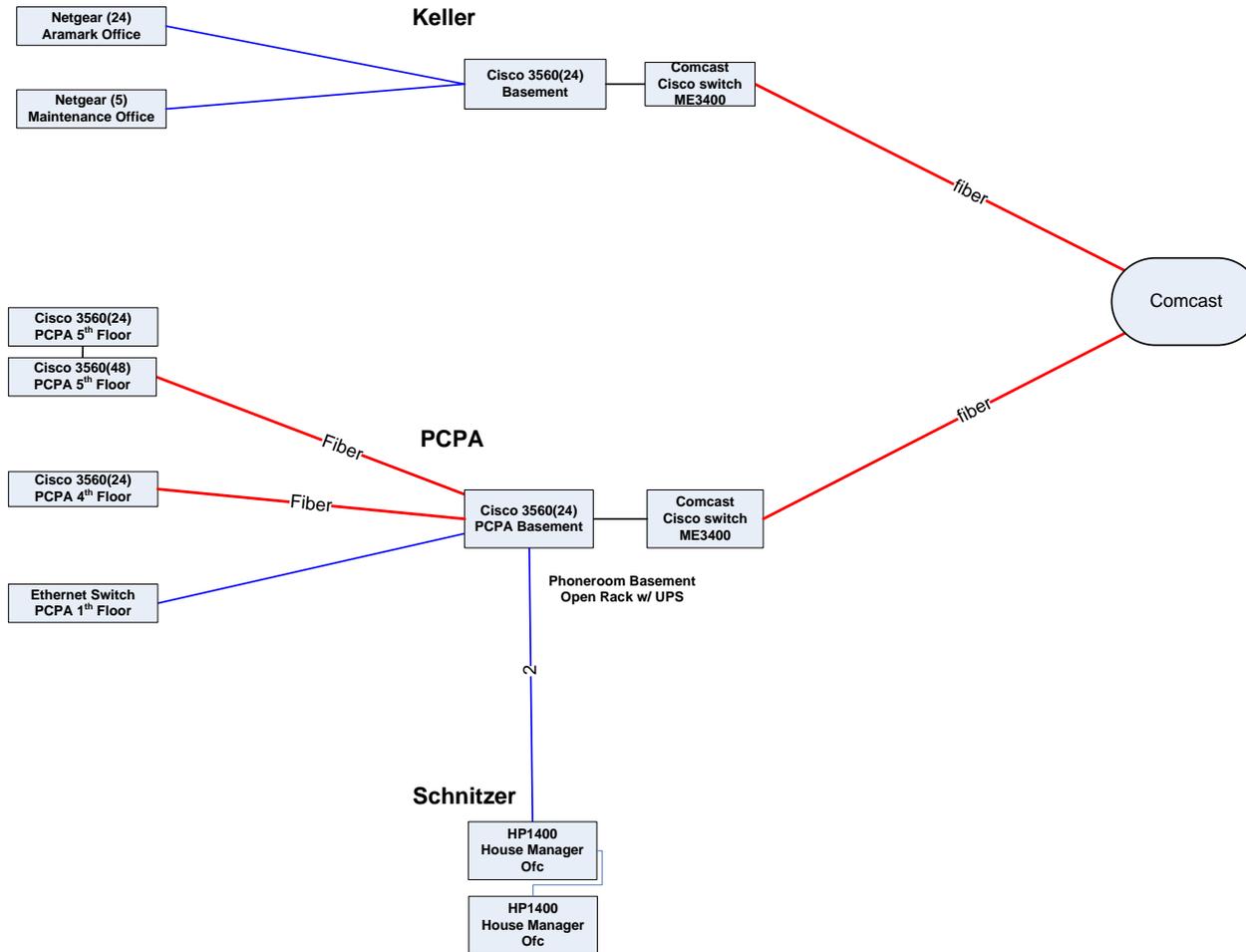
Appendix A – Metro’s local area networks



LAN Diagram 3 - Oregon Convention Center

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Appendix A – Metro’s local area networks

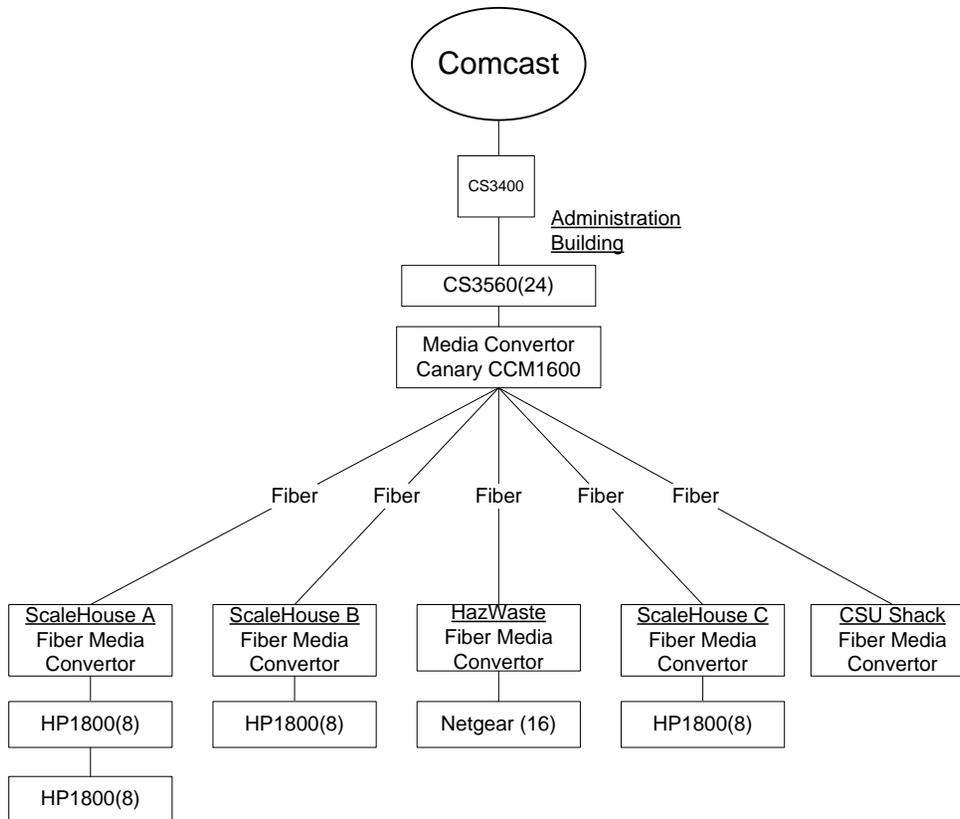


LAN Diagram 4 - Portland Center for the Performing Arts

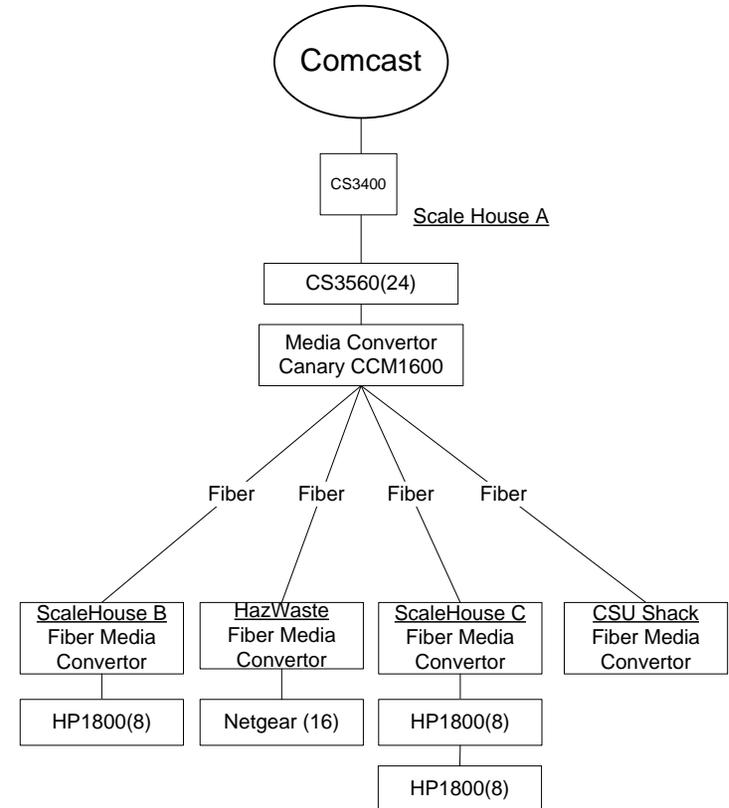
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Appendix A – Metro’s local area networks

Metro Central Transfer Station



Metro South Transfer Station



LAN Diagram 5 - Metro Central and South Transfer Stations

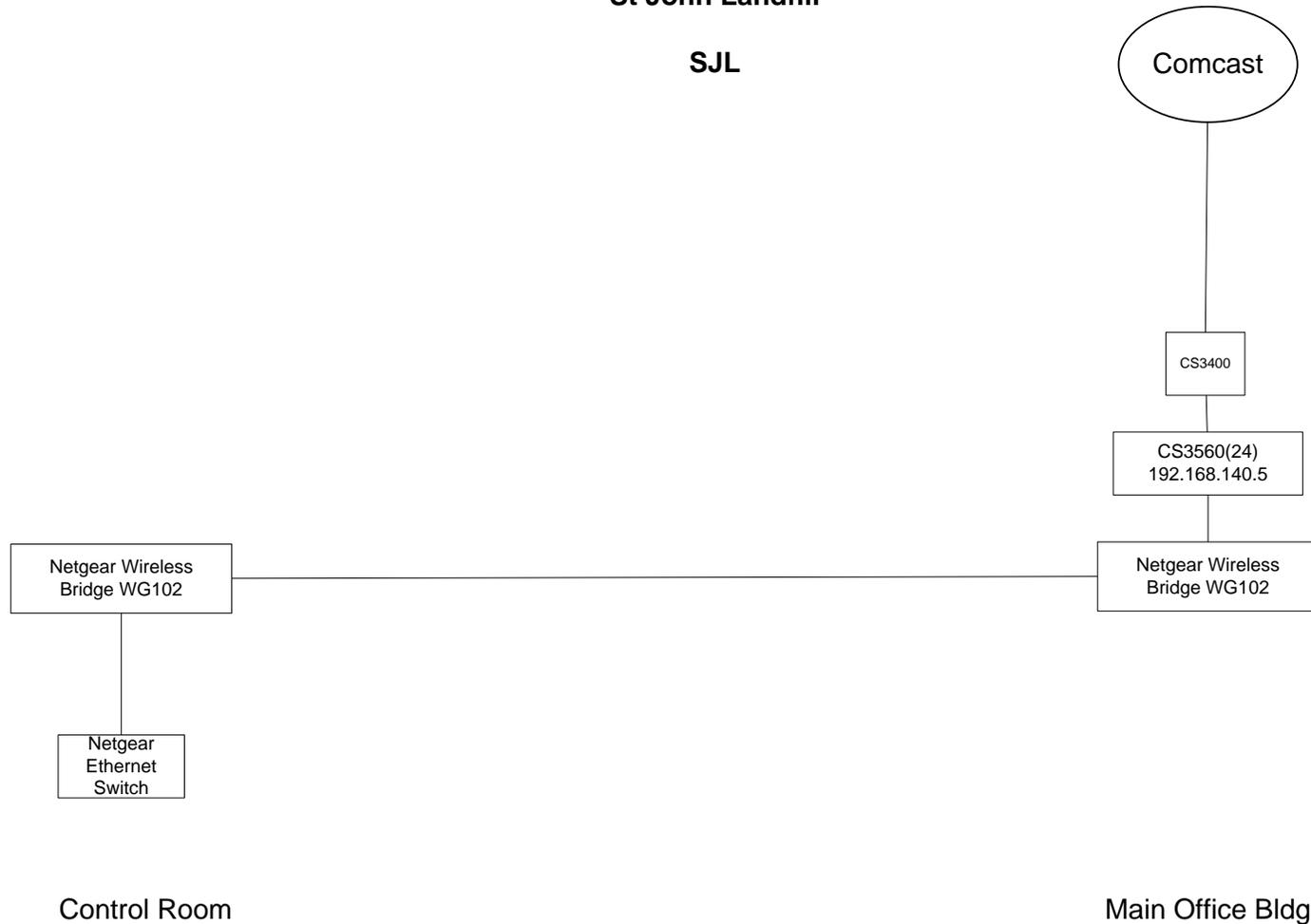
Request for Proposals (RFP 12-1966) Appendix A – Metro’s local area networks



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St John Landfill

SJL

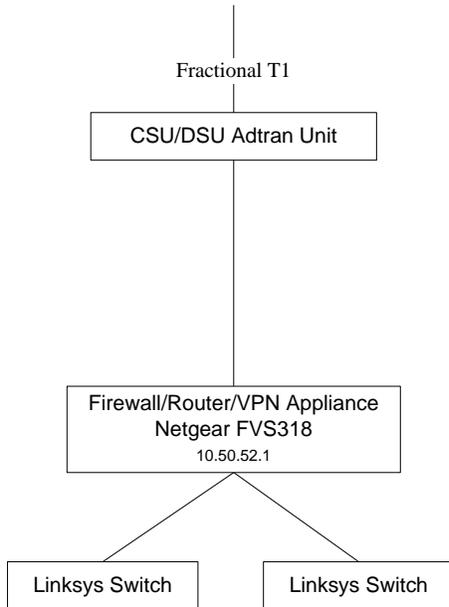


LAN Diagram 6 - St Johns Landfill

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Appendix A – Metro’s local area networks

Latex Facility (VPN)

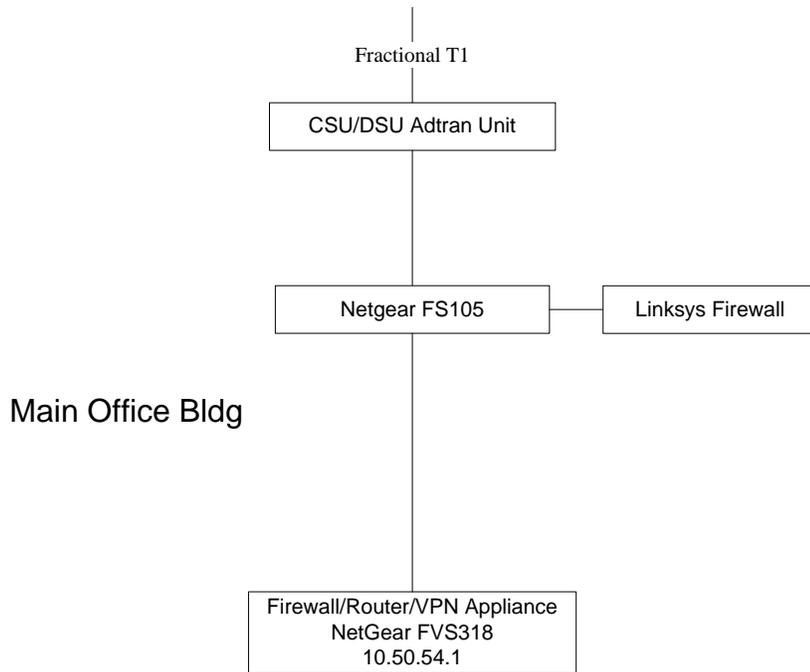


LAN Diagram 7 - Latex Facility

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Appendix A – Metro’s local area networks

Oxbow Park (VPN)

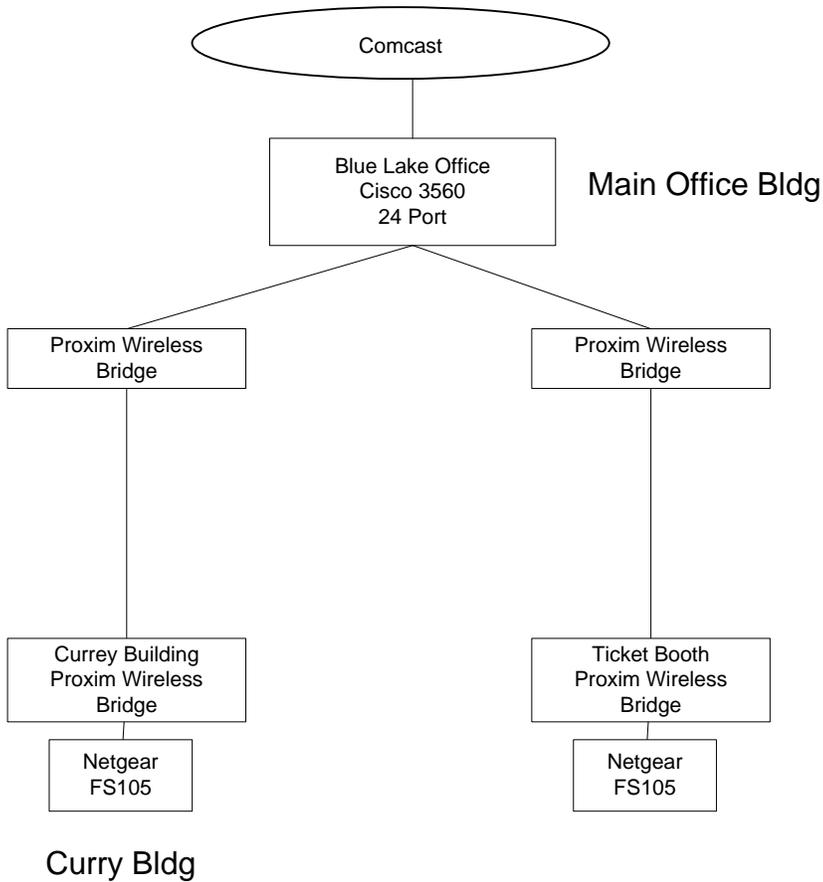


LAN Diagram 8 - Oxbow Park

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Appendix A – Metro’s local area networks

Blue Lake Park

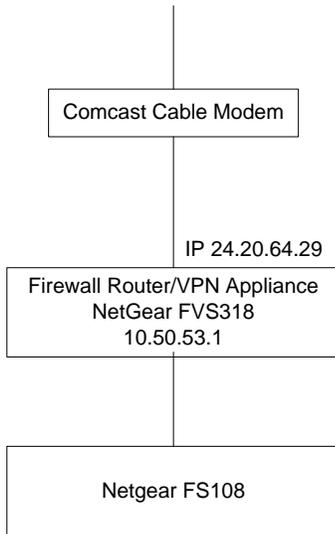


LAN Diagram 9 - Blue Lake Park

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Appendix A – Metro’s local area networks

Borland Park Facility (VPN)



Main Office Bldg

LAN Diagram 10 - Borland Facility

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Appendix B – VoIP Feature Set Profile

Instructions: For each item, the proposer will check one of:

- **STD:** This feature is standard and is included in the base cost of the system.
- **AC:** This feature is available as an add-on to the basic system at an additional cost
- **NA:** This feature is not available.

To explain or provide information on a feature, the vendor will check the **REF** box and include the additional information on a separate sheet, cross-referenced using the feature **ID**.

Definitions of each feature are provided in Appendix C.

Personal Services

ID	Feature	STD	AC	NA	REF
PS-1.	Dial, answer, release, hold, retrieve	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-2.	Blind Transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-3.	Transfer with Consultation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-4.	Whisper Transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-5.	Three-way calling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-6.	Calling line ID delivery & blocking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-7.	Phone Lists - Access to company directory, personal phone lists, via the phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-8.	Outlook Integration MS Exchange 2007, MS Exchange 2010	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-9.	Call forwarding (always, busy, no answer, selective) internal and external	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-10.	Call return & last number redial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-11.	Call Screening by number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-12.	Call Waiting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-13.	Custom ring back & ringtones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-14.	Directed call park & call pickup	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-15.	Do Not Disturb	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-16.	Extension Dialing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-17.	Find-me/Follow-me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-18.	N Way Conferencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-19.	Push-to-Talk (Intercom)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-20.	Remote Office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-21.	Shared Call Appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-22.	Simultaneous Ring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-23.	Speed Dial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-24.	Click-to-Call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-25.	Single number reach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STD – standard feature

AC – feature available for additional cost

NA – feature not available

REF – comment appears on additional sheet

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Appendix B – VoIP Feature Set Profile

ID	Feature	STD	AC	NA	REF
PS-26.	Web Portal & Call Logs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PS-27.	Soft phone, presence, instant messaging, collaboration, video	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Unified Messaging

ID	Feature	STD	AC	NA	REF
UM-1.	Voice Messaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-2.	Retrieval Voice Messages from Voice Portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-3.	Voice Messaging to Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-4.	Personal Greetings & Name Recording	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-5.	Voice Messaging Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-6.	Voice Message Call Back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-7.	Phone, Email, SMS, SMPP Message Waiting Indication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
UM-8.	Presence, Instant Messaging	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Group Service

ID	Feature	STD	AC	NA	REF
GS-1.	Account Codes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-2.	Auto Attendant (IVR)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-3.	Voice Portal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-4.	Attendant Console	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-5.	Business Trunks Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-6.	SIP Trunking Support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-7.	Call Center Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-8.	Computer-telephony integration (CTI)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-9.	Speech recognition capabilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-10.	Calling Plans (call routing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-11.	Device Inventory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-12.	Group Custom Ring back	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-13.	Hunt Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-14.	Simultaneous Ring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-15.	Paging services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-16.	Conference Bridge	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-17.	Video conferencing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-18.	Music on Hold	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-19.	Printable Group Directory	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-20.	Automatic Call Distribution (ACD)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-21.	Multiple ACD groups supported by a single agent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-22.	Desk phone and/or PC-based agent and supervisor terminals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STD – standard feature
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Appendix B – VoIP Feature Set Profile

	Feature	STD	AC	NA	REF
GS-23.	Supervisory functions that show current call volume, abandonment rate, current agent status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-24.	Call reports to show current or historical call statistics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-25.	Call statistics must be retained for a minimum of one year for reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-26.	System must support (enter number) ACD groups with (enter number) users each.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-27.	Advanced ACD Reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-28.	CRM Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-29.	Enhanced Time Of Day	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-30.	Incident based Dispatch and Notification Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-31.	Mobile Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-32.	Integration into Radio Systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-33.	Call record retention and reporting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GS-34.	Malicious Call Trace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Systems Management

	Feature	STD	AC	NA	REF
SM-1.	Account Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-2.	Web Based Systems Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-3.	External Provisioning Interface	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-4.	SDK/External Systems Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-5.	LDAP Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-6.	SSL Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-7.	Voicemail security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-8.	Secure telephone communications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-9.	Unauthorized access toll fraud, server viruses/spyware, DoS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-10.	Secure Remote Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-11.	Redundancy & Failover Mgmt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-12.	3rd Party Monitoring Integration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-13.	Replication Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-14.	Centrally update handsets with new software	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-15.	Maintenance history syslog/snmp	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-16.	Enhanced 911	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SM-17.	Backups of vm, certificates, configurations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Security

	Feature	STD	AC	NA	REF
SE-1.	Use dedicated VLAN segments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SE-2.	Effective encryption	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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SE-3.	Protection against unauthorized use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SE-4.	Protection against denial of service attacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SE-5.	User authentications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

IP Telephones

	Feature	STD	AC	NA	REF
IP-1.	Admin Telephone				
	a) full-duplex speakerphone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) color touch screen display with XML capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) integrated 10/100/1000 switch port	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) headset port w/ integrated amplifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) 5 programmable soft keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) 8 line keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) SIP protocol (list version)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) 24-line expansion module	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IP-2.	Manager Telephone				
	a) full-duplex speakerphone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) color display with XML capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) integrated 10/100/1000 switch port	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) headset port w/ integrated amplifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) 4 programmable soft keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) 6 line keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) SIP protocol (list version)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) add-on video support (list codec support)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IP-3.	Standard Telephone				
	a) full-duplex speakerphone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) color display with XML capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) integrated 10/100/1000 switch port	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) headset port w/ integrated amplifier	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	e) 4 programmable soft keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	f) 2 line keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	g) SIP protocol (list version)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	h) add-on video support (list codec support)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IP-4.	Conference Telephone				
	a) full-duplex speakerphone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	b) pixel-based display	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	c) extended microphones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	d) 4 programmable soft keys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IP-5.	Wireless Telephone				
	a) 802.11a/b/g Wi-Fi	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Request for Proposals (RFP 12-1966)

Appendix B – VoIP Feature Set Profile

Feature	STD	AC	NA	REF
b) color display with XML capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) speakerphone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) support 6 lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) headset port	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) Bluetooth 2.0 support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) charging cradle with speaker and dial-in-cradle capability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h) push-to-talk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i) extended battery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j) RUG	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Appendix C – VoIP Feature Set Definitions

Personal Services

ID	Feature
PS-1.	Dial, answer, release, hold, retrieve - The ability for a telephone handset or a soft phone to dial, or to answer, to put on hold.
PS-2.	Blind Transfer – transfer a call without notifying the desired party/extension of the impending call.
PS-3.	Transfer with Consultation - transfer a call notifying the desired party/extension of the impending call.
PS-4.	Whisper Transfer - Provide a message or data to the recipient before the transfer.
PS-5.	Three-way calling - ability to add a third party to an on-going call
PS-6.	Calling line ID delivery & blocking – Calling line ID delivery -The ability to override the persistent presentation (or hiding) of the calling line ID (CLID) so users can allow the delivery of their identity for the next call. At the end of the call, the presentation of the user's identity is restored to its persistent status, once the call is completed.
PS-7.	Phone Lists, Access to company directory, personal phone lists, via the phone – Handset and softphones having the ability to access the company directory, personal lists ..etc
PS-8.	Outlook Integration MS Exchange 2007, MS Exchange 2010
PS-9.	Call forwarding (always, busy, no answer, selective) internal and external – have the ability to forward the calls internally or externally. Calls can always be forwarded to another number, or have a busy tone, no answer ..etc
PS-10.	Call return & last number redial – the ability to return a call back or to redial a number.
PS-11.	Call Screening by number – the ability to display incoming calls, ability to reject calls who block delivery of their name and number,
PS-12.	Call Waiting-& Cancel Call Waiting - When on a call and a second call comes in, a beep/mwi indicates of a second call waiting to be answered.
PS-13.	Custom ringback & ringtones – when the number dialed is busy or does not answer, initiating this feature makes your phone ring when the called party becomes available. The number is automatically redialed when you answer the special ring, Ringtones - The ability to have different ringtones for different set of calling parties.
PS-14.	Directed call park & call pickup – the ability to put on hold and have another party pickup without leaving the desk.
PS-15.	Do Not Disturb - this ability allows phone users to disable audible ringing for incoming calls.
PS-16.	Extension Dialing -
PS-17.	Find-me/Follow-me – the ability to allow you to create a telephone call schedule so that callers can find you wherever you are, just by dialing a single number
PS-18.	N Way Conferencing - the ability to conference more than three people on the call
PS-19.	Push-to-Talk (Intercom) - this feature allows users to communicate over and monitor broadcasts of multiple channels of communications at the office or from a remote site
PS-20.	Remote Office – the ability for an office phone to be used at the office, home, remotely
PS-21.	Shared Call Appearance - The Shared Line Appearance feature allows users to share lines and also provides status monitoring of the shared line. When a user places an outgoing call using such an appearance, all members belonging to that particular SLA group are notified of this usage, and are blocked from using this line appearance until the line goes back to idle state or if the call is placed on hold. Similarly all members of the SLA group are notified of an incoming call and the call can be picked up on a line appearance associated with the SLA extension.

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Appendix C – VoIP Feature Set Definitions

ID	Feature
PS-22.	Simultaneous Ring - a feature that allows multiple phones to ring at the same time within a specific group
PS-23.	Speed Dial – a feature to allow have a list of numbers that are on a speed dial list
PS-24.	Click-to-Call – the ability to support Click to call technology or Request-a-Call
PS-25.	Single number reach -- PS17
PS-26.	Web Portal & Call Logs -
PS-27.	Softphone, presence, instant messaging, collaboration, video

Unified Messaging

	Feature
UM-1.	Voice Messaging -
UM-2.	Retrieval Voice Messages from Voice Portal – the ability to retrieve voice messages from a webpage.
UM-3.	Voice Messaging to Email – the ability to have voice messages to be made available within the outlook client/web mail.
UM-4.	Personal Greetings & Name Recording – the ability have a various types of recording for office hour greeting, after hours, and holidays.
UM-5.	Voice Messaging Groups – the ability to send a voice mail message to a group of users
UM-6.	Voice Message Call Back
UM-7.	Phone, Email, SMS, SMPP Message Waiting Indication – The ability of the phone to indicate that there is a voicemail
UM-8.	Presence, Instant Messaging

Group Service

	Feature
GS-1.	Account Codes/authorization codes – the system administrator should be able to track calls placed by the user. The user will use an access code to place the calls.
GS-2.	Auto Attendant (IVR)
GS-3.	Voice Portal
GS-4.	Attendant Console
GS-5.	Business Trunks Support
GS-6.	SIP Trunking Support
GS-7.	Call Center Services
GS-8.	Computer-telephony integration (CTI)
GS-9.	Speech recognition capabilities
GS-10.	Calling Plans (call routing)
GS-11.	Device Inventory
GS-12.	Group Custom Ringback
GS-13.	Hunt Groups
GS-14.	Simultaneous Ring
GS-15.	Paging services
GS-16.	Conference Bridge

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Appendix C – VoIP Feature Set Definitions

Feature

- GS-17. Video conferencing
- GS-18. Music on Hold
- GS-19. Printable Group Directory
- GS-20. Automatic Call Distribution (ACD)
- GS-21. Multiple ACD groups supported by a single agent
- GS-22. Desk phone and/or PC-based agent and supervisor terminals
- GS-23. Supervisory functions that show current call volume, abandonment rate, current agent status
- GS-24. Call reports to show current or historical call statistics
- GS-25. Call statistics must be retained for a minimum of one year for reporting
- GS-26. System must support (enter number) ACD groups with (enter number) users each.
- GS-27. Advanced ACD Reporting
- GS-28. CRM Integration
- GS-29. Enhanced Time Of Day
- GS-30. Incident based Dispatch and Notification Integration
- GS-31. Mobile Integration
- GS-32. Integration into Radio Systems
- GS-33. Call record retention and reporting
- GS-34. Malicious Call Trace

Systems Management

Feature

- SM-1. Account Management
- SM-2. Web Based Systems Administration
- SM-3. External Provisioning Interface
- SM-4. SDK/External Systems Integration
- SM-5. LDAP Integration
- SM-6. SSL Security
- SM-7. Voicemail security
- SM-8. Secure telephone communications
- SM-9. Unauthorized access toll fraud, server viruses/spyware, DoS
- SM-10. Secure Remote Management
- SM-11. Redundancy & Failover Mgmt
- SM-12. 3rd Party Monitoring Integration
- SM-13. Replication Services
- SM-14. Centrally update handsets with new software
- SM-15. Maintenance history syslog/snmp
- SM-16. Enhanced 911
- SM-17. Backups of vm, certificates, configurations

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Appendix C – VoIP Feature Set Definitions

IP Telephones

	Feature
IP-1. Admin Telephone	<ul style="list-style-type: none">i) full-duplex speakerphonej) color touchscreen display with XML capabilityk) integrated 10/100/1000 switch portl) headset port w/ integrated amplifierm) 5 programmable soft keysn) 8 line keyso) SIP protocolp) 24-line expansion module
IP-2. Manager Telephone	<ul style="list-style-type: none">i) full-duplex speakerphonej) color display with XML capabilityk) integrated 10/100/1000 switch portl) headset port w/ integrated amplifierm) 4 programmable soft keysn) 6 line keyso) SIP protocolp) add-on video support
IP-3. Standard Telephone	<ul style="list-style-type: none">i) full-duplex speakerphonej) color display with XML capabilityk) integrated 10/100/1000 switch portl) headset port w/ integrated amplifierm) 4 programmable soft keysn) 2 line keyso) SIP protocolp) add-on video support
IP-4. Conference Telephone	<ul style="list-style-type: none">e) full-duplex speakerphonef) pixel-based displayg) extended microphonesh) 4 programmable soft keys
IP-5. Wireless Telephone	<ul style="list-style-type: none">k) 802.11a/b/g WiFil) color display with XML capabilitym) speakerphone

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Appendix C – VoIP Feature Set Definitions

Feature

- n) support 6 lines
- o) headset port
- p) Bluetooth 2.0 support
- q) charging cradle with speaker and dial-in-cradle capability
- r) push-to-talk
- s) extended battery
- t) rug