Department/Program requesting TIP funding: School of Business

Proposal Coordinator Richard Skolnik

Individual Proposer Name David Kahn

Department School of Business
Phone Number 315.312.6383
E-mail address david.kahn@oswego.edu

Signature of Proposal Coordinator

Abstract of TIP proposal (100 words):

1) Request purchase of Bloomberg Terminal Financial Software.
2) Request a desktop computer with dual monitors for use with Bloomberg software and faculty/student work.
3) Request purchase of (2) 70'' LCD/Monitors.
4) Request of 40'' LCD/Monitor and mount for student presentations/projects for Rich Hall room 215. As alternative, suggest move the 40'' LCD from 2nd floor main lobby into Rich 215 and request purchase of a new 70'' LCD to replace moved LCD.
5) Request of replacement printer for the School of Business BASAC printer, Rich 230.

	Yes		No	Matching funds available to support this proposal? If yes, please specify on a separate sheet.
			✔	

Signature of Department Chair:

Signature of Division Dean:

Collaborating Departments/Programs: _____

Proposal Coordinator _____
Individual Proposer Name _____
Department _____
Phone Number _____
E-mail address _____
_____

Signature of Proposal Coordinator _____

Abstract of TIP proposal (100 words):

	Yes		No	Matching funds available to support this proposal? If yes, please specify on a separate sheet.

Signature of Department Chair: _____

Signature of Department Chair: _____

Signature of Department Chair: _____

Signature of Department Chair: _____

Signature of Department Chair: _____

Signature of Department Chair: _____

Signature of Division Dean: _____

Signature of Division Dean: _____

Description and outline of request for TIP funding for 2012-2013 academic year. If proposal has several parts, please prioritize each part. Use additional sheets as needed:

1) Request purchase of Bloomberg Terminal Education Financial software.
We are requesting the purchase of a one-year subscription to the Bloomberg terminal software, which the School of Business has previously tested out for a thirty-day trial period. During this trial faculty and students used the software and agree that having it adds an almost irreplaceable real world environment that graduating students will be using in the workplace. In addition the faculty who trialed the software strongly felt that it could easily be used for coursework.
See attachment page for software overview and faculty recommendation.

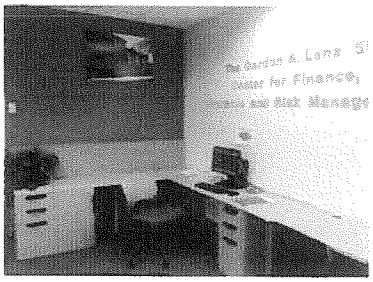
1a) Request a desktop computer with dual monitors for use with Bloomberg software and faculty/student work.
The Bloomberg terminal software requires a dedicated computer, running Windows 7 or higher. We request that the desktop machine have the hardware capabilities to run dual monitors, as that is the way the software has been designed. This computer will also serve as a desktop computer for student group work in Rich Hall 314 Suite B, The Gordon A. Lenz Center for Finance. The CTS recommended desktop computer will be adequate, Dell Optiplex 990 with two 21.5" Dell Monitors.
See attachment page for hardware overview.

2) Request purchase of (2) 70" LCD/Monitor and mount.
The first LCD would be replacing the existing digital signage located on the 2nd floor. The second LCD would be used for student/faculty led group work with financial software and projects, including, but not limited to the above mentioned Bloomberg software. This second requested LCD would be located in Rich Hall 314 Suite B, The Gordon A. Lenz Center for Finance Insurance and Risk Management.

The existing LCD is connected to the campus Digital signage software, SYMON. The School of Business is constantly pushing content to it, and this LCD has become the central information hub for the school. Having a larger screen will allow students to easily view content as well as engage students in campus updates.

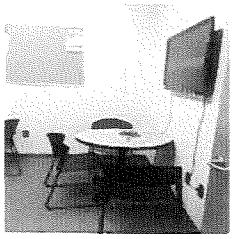
The School of Business was fortunate to work with CTS when trialing the Bloomberg software, and was loaned out a 70" LCD that was used in The Gordon A. Lenz Center. This 70" LCD was used with Bloomberg, allowing its users the ability to have many financial windows opened to better manipulate the data.

We also found that having an LCD in this area gave the Insurance and Risk Management groups an excellent academic environment for group work in collaboration with their professors.



3) Request of 40" LCD/Monitor and mount for student presentations/projects for Rich Hall room 215.

We are requesting the purchase and installation of a 40'' LCD/Monitor, with mounting and cabling, in Rich 215. This is a "by reservation" only student team and group project room. The School of Business Student Advisory Council, as well as the overall student body in using Rich 216, which has the same requested technology, have expressed interest in having another room in Rich Hall where they can practice their presentations, as well as work collaboratively on team projects using their portable laptops in conjunction with a large display unit



4) Request of replacement printer for the School of Business BASAC printer, Rich 230.

The BASAC advisement center in Rich 230 has only one printer, an HP 4350 with a duplexing unit. This printer serves as the printer for the BASAC lab computers as well as printer for the BASAC staff. This printer also serves as the only BANNER transcript printer for the entire School of Business. Currently the HP 4350, even after several repairs and maintenance replacement parts, continuously jams and has server print/toner issues. A newer printer that could handle the moderate print load from this office is very much needed to continue the workflow of student advisement in the School of Business.

Proposals must address academic initiatives that relate to instruction, student usage, improving student usage, and/or improving student learning through the use of technology. Proposals for new, innovative and/or trial initiatives will be given priority; however, equipment replacement and expansion of existing equipment or services will also be considered.

Student impact statement:
(Description of impact of requested hardware and/or software on students' access to computing technology, number of students affected, etc.)

1) **Request purchase of Bloomberg Terminal Education Financial software.**
The Bloomberg Terminal software is one of the most powerful and flexible platforms for financial students, who need real-time data, news and analytics to make smarter, faster, and more informed business decisions. Bloomberg brings the real world of finance into the classroom, exposing students to the industry-leading Bloomberg Professional service and giving them an edge when they enter the workplace. Students can enhance research and class work while learning how to analyze financial markets, assess economic scenarios, and interpret developments that impact the global economy.
see attachment page for software overview and faculty recommendation.

1a) Request a desktop computer with dual monitors for use with Bloomberg software and faculty/student work.
The Bloomberg terminal software requires a dedicated computer, running Windows 7 or higher. We request that the desktop machine have the hardware capabilities to run dual monitors, as that is the way the software has been designed. This computer will also serve as a desktop computer for group work in The Gordon A. Lenz Center for Finance.

2) Request purchase of (2) 70" LCD/Monitors and mount.
The first LCD would be replacing the existing digital signage located on the 2nd floor of Rich Hall, which is connected to the campus Digital signage software, SYMON. The School of Business is constantly pushing content to it, and this LCD has become the central information hub for the school. Having a larger screen will allow students to easily view content as well as engage students in campus updates.

The second LCD would be used for student/faculty led group work with financial software and projects, including, but not limited to the above mentioned Bloomberg software. This second requested LCD would be located in Rich Hall 314 Suite B, The Gordon A. Lenz Center for Finance Insurance and Risk Management.

The School of Business found, through a temporary loan from CTS, that having an LCD in this area gave the Insurance and Risk Management groups an excellent academic environment for group work in collaboration with their professors. Having a large LCD also improved the dynamics of the Bloomberg software for student, student groups, and faculty lead group work.

3) Request of 40" LCD/Monitor and mount for student presentations/projects for Rich Hall room 215.
With this purchase, students will no longer have to try and locate an empty classroom to practice their many presentations they will give during their stay at the School of Business. By allowing students to connect their laptops to a large display unit, student groups and teams can learn in a collaborative environment, instead of gathering around one student's laptop. We have seen the success this has had in Rich 216 using the display added there last year. The demand has outgrown this one room and it would greatly benefit the students to have another.

4) Request of replacement printer for the School of Business BASAC printer, Rich 230.
With a newer printer ,which can handle the moderate print demands from this office, we are ensuring the continued workflow of student advisement in the School of Business. New and transfer students will be able to print out their schedules as well as staff being able to print transcripts.

EQUIPMENT REQUESTED (rank highest priority first)
Whenever possible, please use the models and costs recommended by CTS:
http://www.oswego.edu/cts/services/administrative/computer_equipment.html

Manufacturer	Model	Units	Unit Cost	Cost
Dell	Optiplex 990 including monitor.(CTS recommended)	1	$738.00	$738.00
Dell	P2212H, Wide Screen 21.5 inch additional monitor. (CTS recommended)	1	$199.00	$199.00
Sharp	LC-70E640U	2	~$1,934.00	$3,868.00
Toshiba	40SL412U	1	~$799.00	$799.00
HP	LaserJet P4515	1	~$1,695.00	$1,695.00
			Total Hardware Cost:	$7,299.00

EQUIPMENT BEING REPLACED

Manufacturer	Model	Units	SUNY ID #
Hewitt Packard	4350n	1	23016877
Toshiba	REGZA 42"	1	23018789

SOFTWARE REQUESTED (rank highest priority first)

Manufacturer	Model	Units	Unit Cost	Cost
Bloomberg Services	Terminal education	1	$24,000.00	$24,000.00
			Total Software Cost:	$24,000.00

Total Software Cost:	$24,000.00
Total Hardware Cost:	$7,299.00
Total Requested:	$31,299.00

INTRODUCING BLOOMBERG FOR EDUCATION

"At Duke, we try to give our students the best educational and career tools available and Bloomberg is one of them."
JOHN CACCAVALE, Executive Director, Financial Economics Center, Duke University

INTEGRATE THEORY WITH REAL-WORLD PRACTICE

Preparing students for the realities of a difficult labor market is more challenging today than ever before. Bloomberg for Education gives your institution an advantage by empowering students with the hands-on knowledge and real-world experience they will need to compete. Bloomberg for Education brings financial leadership into the classroom by exposing students to the industry-leading platform for news, data, analytical tools and research that drives the global marketplace.

For more than 20 years, Bloomberg has been committed to helping universities incorporate our service into academic programs worldwide in order to better equip students with the skills demanded by today's top employers. Bloomberg for Education is also supported by our industry-leading customer support teams that provide on-site training and teach you how to integrate our service into your curriculum. Bloomberg offers a pricing plan available only to colleges and universities that provides additional terminals, at no extra charge, with a minimum purchase.

EMPOWER YOUR STUDENTS

Universities around the globe use Bloomberg to bring the real world of finance into the classroom, providing students with access to the same information platform used by leading decision makers in business, finance and government.

ENRICH YOUR CURRICULUM

With Bloomberg for Education, students can deepen both their research and classwork while learning how to analyze financial markets, assess economic scenarios, and interpret the key news events that impact the global economy. The skills they develop from this experience provide them with the confidence and advantage they need to compete in today's job market.

LEVERAGE BLOOMBERG TO SUPPORT MULTIPLE DISCIPLINES

Provide your students with the same platform used by the world's leading banks, corporations and government agencies to enhance their academic studies across a wide range of disciplines.

FINANCE & ECONOMICS

Portfolio Theory
Securities Analysis
Derivatives
Corporate Finance
Investment Banking
Financial Engineering
International Trade
Accounting
Foreign Exchange

ADDITIONAL DISCIPLINES

Health Care & Pharmaceuticals
Energy
Agriculture
Journalism
Real Estate
Government
Public Policy

SUPPORTING RESEARCH & APPLIED STUDIES

Library Reference Resource
Investment Clubs
Academic Trading Floors

UNPARALLELED BREADTH & DEPTH OF INFORMATION FROM A SINGLE SOURCE

News

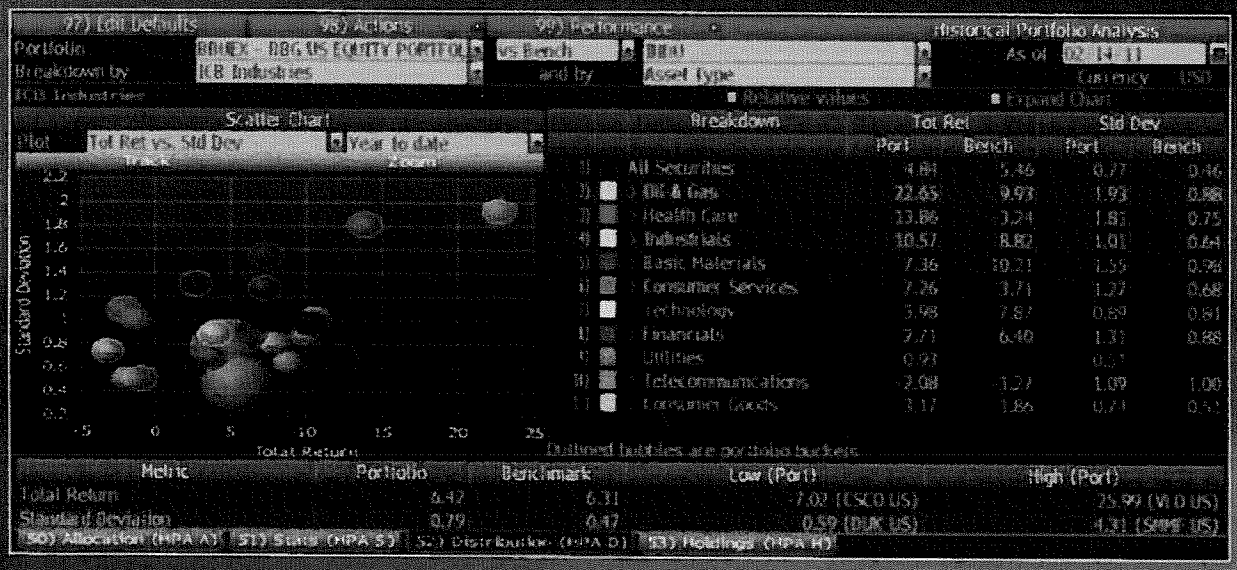
Bloomberg gives your students access to exclusive news stories as they break. Teach your students how to follow and interpret the market-moving events that professional traders and money managers rely on to stay informed and make critical financial decisions.

- More than 5,000 original news stories each day
- 30,000+ aggregated news sources
- Coverage from 146 bureaus in 72 countries

Analytics

Move students from the hypothetical to the real world by using Bloomberg to perform historical market analysis, compare different investment strategies and analyze specific companies and industries.

- More than 15,000 indices and 100+ metrics
- Coverage of 45,000+ companies in 108 countries
- 2,800 fundamental data items and financial ratios



ANALYTICS Create investment portfolios and analyze performance, risk and sector allocations against benchmarks.

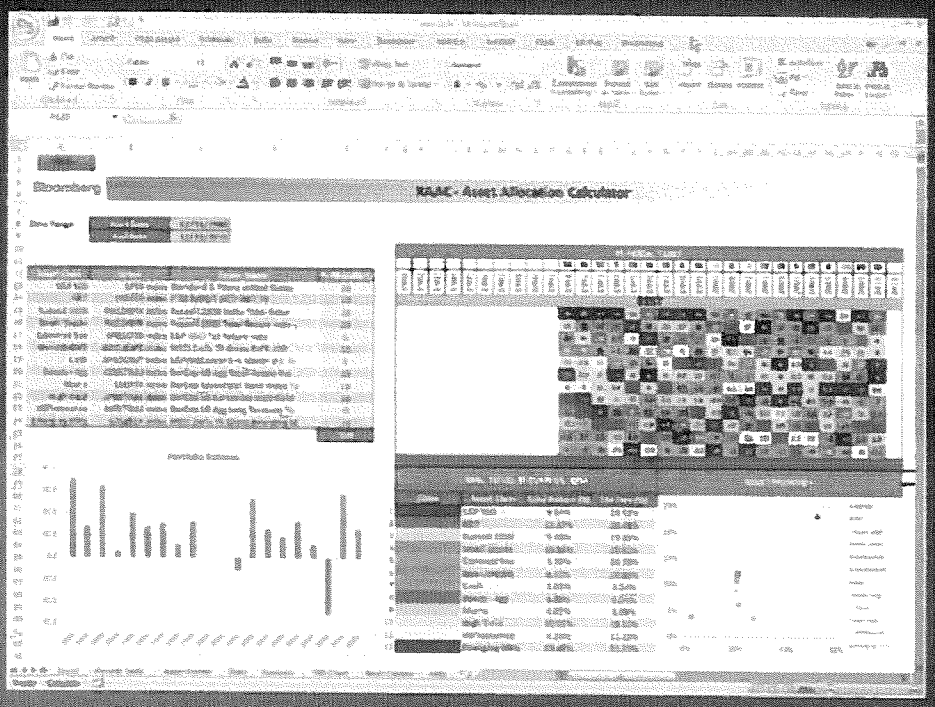
"Students who graduate with Bloomberg experience gain a huge advantage in the early stages of their career."
BROOKE COBY, Head of Campus Recruitment, RBS Global Banking

Data

Empower your students with the Bloomberg Excel Add-In. Using simple one-click data export features, students can leverage real-time and historical data within the Bloomberg Professional® service to fuel their spreadsheets. They will be able to monitor, manipulate and analyze data and create the same types of financial models that professionals rely on to make real-world business decisions.

Research

Enrich your curriculum, whether you are looking at broad economic trends, specific company research, sophisticated trading strategies, or anything in between.



EXCEL TEMPLATE LIBRARY
Access more than 100 pre-designed Microsoft Excel® templates to suit your needs.

INTEGRATING BLOOMBERG INTO YOUR CURRICULUM

In addition to Bloomberg's world-class 24/7 customer support, you will have access to a team of Bloomberg specialists who will assist and advise you through every step of the process.

FACULTY SUPPORT

- We provide personalized one-on-one training by Bloomberg experts who can help teach students directly in a classroom setting.
- Bloomberg Essentials training program offers instructional videos and online tests to certify course completion.

STUDENT SUPPORT

- Access 24/7 live support instantly in more than 15 languages.
- Bloomberg University, our online training resource, allows students to deepen knowledge and skill through self-guided courses.

TECHNICAL SUPPORT

- We provide total support for installing a single terminal or building a Financial Markets Lab.
- Experience seamless integration with your university's IT system and teaching environment.

ABOUT THE BLOOMBERG PROFESSIONAL SERVICE

The founding vision in 1981 was to create an information services, news and media company that provides business and financial professionals with the tools and data they need on a single, all-inclusive platform. The success of Bloomberg is due to the constant innovation of our products, unrivaled dedication to customer service and the unique way in which we constantly adapt to an ever-changing marketplace. The Bloomberg Professional® service is a powerful and flexible tool for financial professionals—whatever their needs—in cash and derivatives markets as diverse as equities, currencies, commodities, money markets, government and municipal securities, mortgages, indices, insurance, and legal information. The Bloomberg Professional service seamlessly integrates the very best in real-time data, news and analytics.

In addition, Bloomberg users benefit from on-demand multimedia content, extensive electronic trading capabilities, and a superior communications platform. Bloomberg customers include influential decision makers in finance, business and government. By offering all of this assistance and functionality to users on a single platform, for a single price, business and financial professionals recognize the Bloomberg Professional service as the definitive tool for achieving their goals.

"November 26, 2012

To: Richard Skolnik, Dean of the School of Business

From: John A. MacDonald
Mary T. Rodgers

Re: Bloomberg replacement of Research Insight

Bloomberg offers much, much more than Research Insight. Bloomberg data covers all current market data in addition to that information in Research Insight. Bloomberg can provide a substitute for the CRSP database. Research Insight does not have market data other than monthly prices and returns on stocks. Bloomberg has the entire bond and derivative markets' data and analysis. Bloomberg has significant supply chain information that allows one to search forward or backwards in the chain and that of competitors. This is not available in Research Insight. Security analysts' opinions are available. Bloomberg allows for significant technical analysis with charting, which is not part of the Research Insight product. Bloomberg covers worldwide equity and bond markets, so analysis would be available on, say, Chinese corporations. Research Insight charges several thousand dollars more for company data on firms outside of North America. We subscribe only to North American data with Research Insight. Bloomberg has hedge and mutual fund data that is not in Research Insight. Bloomberg covers government securities and has portfolio management functions

Bloomberg has recognition and cache with students, faculty, alumni, and parents, while Research Insight is a product known primarily to accounting and finance faculty and security analysts. Students, once exposed, tend to be very excited about using the terminal and appear to self-schedule so no quere exists, even with the one terminal.

Students can set up individual accounts once the Bloomberg subscription is in place and certify themselves as to Bloomberg use, which is a valuable addition to a business resume. (There is a "Jobs" listing in Bloomberg though typically only for people with some work experience.)

Bloomberg has an excellent "Instant chat" help function that is staffed by very knowledgeable people whose knowledge extends to the markets rather than just the data product. Research Insight also has on-line help but the speed doesn't seem to be as good.

Bloomberg has on-going updating, whereas Research Insight has only quarterly updates that are made by the School's IT person.

Bloomberg is a direct connection whereas we have had two semesters in a row where Research Insight updates and problems with the SUNY-Oswego servers prevented any use of the product at all.

With respect to the argument that access will be a problem with high demand, some suggestions to overcome the problem include having faculty or a graduate assistant pull off the data for several companies and provide this data on ANGEL rather than have each student or team pull off the data. A schedule with a sign-up sheet could be established.

To add to the list of additional utilities or information sets available in Bloomberg, there are retrievable short case studies (example overview and graph for the debt default probabilities for several

companies.) Price histories can have several events identified over the history period (acquisitions, buybacks, news on the various officers, etc.) Financial information of the firm can be instantly translated to one of several currencies. One can easily break out the segments/divisions of the firm. Instantaneous access to the EDGAR database is very convenient.

Students have provided emails of support to you. Thirty-eight students in the Investment Club, seven students in the CFA Research Challenge, 1 student in an Independent Study and 18 students in FIN 425, have been/are active users of the Bloomberg terminal already. Requested demonstrations have been done for an interest graduate student and a new mathematics professor. We see additional interest outside the School of Business. Two alumni have engaged with students at the Terminal. Todd Wakefield, small cap fund manager at The Boston Company, and Tom Lenihan, asset manager at Metlife, have shown students in FIN 425 and in the Investment Club how they use Bloomberg in their professional capacities. The platform has proved to be a lively way for alum to engage with students.

By the way, the 72" large screen monitor clearly supports the FIN 425 class sessions better than the small monitor and makes a strong visual impact on all who see it. We urge also adding a large screen monitor.

In summary, we request Bloomberg's Database be subscribed to for the coming calendar year and replace the Research Insight Access. "

Dell recommends Windows.

Your Current E-quote Number
1004369755724

E-quote Help

E-Quotes

Summary View | **Detail View** Print Back to List Email Add Item

E-quote Name	standard 22	**E-Quote Description**	990
Saved By:	Michael Pisa	**Phone Number:**	(315) 312-3572
	michael.pisa@oswego.edu	**Purchasing Agent:**	
Saved On:	Monday, October 22, 2012	**Notes/Comments:**	
Expires On:	Friday, December 21, 2012	**Additional Comments:**	
Premier Page Name	NYS HiEd Agg-Buy 2012 Recommended Configurations		

Contract Code: Agreement PT65340

Description

Optiplex 990 Energy Star Small Form Factor

Date & Time October 22, 2012 5:35 PM CST

SYSTEM COMPONENTS

Optiplex 990 Energy Star Small Form Factor Qty 1

OptiPlex 990 Small Form Factor for Standard Power Supply, Windows 7 Professional, Media, 64-bit, English Unit Price $738.00

Catalog Number: **25 RCRC1121069-3133553**

Module	Description	Product Code (hide)	Sku (hide)	Id (hide)
OptiPlex 990 SFF	OptiPlex 990 Small Form Factor for Standard Power Supply	990SFF	[225-0460]	1
Operating System(s)	Windows 7 Professional, Media, 64-bit, English	W7P61E	[421-5608] [421-5334] [330-6228]	11
Processors	2nd Gen Intel Core i7-2600 Processor (Quad Core, 3.40GHz Turbo, 8MB, w/ HD2000 Graphics)	VI72600	[317-6591]	2
Memory	4GB DDR3,Non-ECC,1333MHz Dual Channel SDRAM,2x2GB	4G3N332	[317-6987]	3
Keyboard	Dell KB212-B USB 104 Quiet Key Keyboard,English	EUSBE	[331-2024]	4
Monitors	Dell Pro P2212H,Wide screen,21.5in VIS,HAS,VGA,DVI	P2212H	[320-2939]	5
Video Cards	512MB AMD RADEON HD 6350 (2 DVI), Low Profile	AM6350D	[320-1875]	6
Boot Hard Drives	250GB 3.5 6.0Gb/s SATA with 8MB DataBurst Cache™	250GS3	[342-2453]	8
Mouse	Dell MS111 USB Optical Mouse	USBOP	[330-9458]	12
Systems Management Mode	Intel® vPro Technology Enabled	VPRO	[331-1134]	15
Removable Media Storage Device	8X Slimline DVD+/-RW, Roxio Creator™ CyberlinkPowerDVD™ No Media	DRM8N	[318-0620] [421-4370] [421-4539]	16
Thermals	Heat Sink, Performance/Mainstream, Small Form Factor	HSSFF	[331-1198]	17
Speakers	Dell AX510 Sound Bar for all UltraSharp Flat Panel Displays (Black)	AX510	[313-6414]	18

Power Supplies	OptiPlex 990 Small Form Factor Standard Power Supply	SFFPSU	[421-5078] [330-7422] [331-1982] [331-2483]	20
Documentation	Documentation English and French	DOCENF	[331-2030] [330-1711]	21
Productivity Software	No Productivity Software	NOPSW	[421-3872]	22
Hard Drive Mode	No RAID	NORAID	[341-8036]	24
Energy Efficiency Options	Dell Energy Smart Power Management Settings Enabled	ESMART	[330-4817]	25
Resource DVD	No Resource DVD	NORDVD	[313-3673]	27
Hardware Support Services	3 Year Basic Hardware Service with 3 Year NBD Limited Onsite Service After Remote Diagnosis	U3OS	[938-5152] [951-4670] [935-2098] [929-6267]	29
Installation Services	No Onsite System Setup	NOINSTL	[900-9987]	32
Security Hardware	Chassis Intrusion Switch Option	SWITCH	[317-6625]	38
Setup and Features Information Tech Sheet	No Tech Sheet	NOTSH	[310-9444]	40
Ship Packaging Options	Shipping Material for System, Small Form Factor	SFFSHIP	[331-1270]	41
Processor Branding	Core i7 vPro Sticker	VICI7	[331-1563]	749
POET Approval	POET #P517818027			

TOTAL: $738.00

Sub-total $738.00

Tax

Total Price[1]

In the event that you are subject to a tax holiday you will not be charged tax Learn More

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Large Text

Addendum to page 8:

Cost of Bloomberg Terminal Education Financial Software
Total Software Cost.
Total Requested.

The School of Business and Continuing Education have recently come to an agreement in which Continuing Education will assist the School of Business in the cost of the Bloomberg software. This was not included in the initial Technology Initiative Project grant due to time constraints and logistics.

Updated:

1) Request purchase of Bloomberg Terminal Education Financial software.

We are requesting the purchase of a one-year subscription to the Bloomberg terminal software, which the School of Business has previously tested out for a thirty-day trial period. During this trial faculty and students used the software and agree that having it adds an almost irreplaceable real world environment that graduating students will be using in the workplace. In addition the faculty who trialed the software strongly felt that it could easily be used for coursework.

Manufacturer	Model	Units	Unit Cost	Cost
Bloomberg Services	Terminal education	1	$24,000.00	$24,000.00
Extended Learning				-$18,000
			Total Software Cost:	$6,000

Total Software Cost:	$6,000.00
Total Hardware Cost:	$7,299.00
Total Requested:	$13,299.00