**RFP #2-21 Oracle Upgrade Services**

Addendum 2 - Questions and Responses

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| # | Question | Response |
| PROPOSAL RESPONSE | | |
| 1 | Is extension on deadline for submission a possibility? | No. In order to meet all deadlines for the project, the RFP must remain on the critical path of a February Board meeting and award. |
| 2 | Can Garland ISD make this an e-submission instead of physical copy submission? | No. The guidelines stated in the RFP for proposal submission remain unchanged. |
| 3 | Would GISD accept email submissions, especially given current COVID conditions? | No. See section 1.1.4. Number of Copies and section 4. Proposal Responses. If assistance is required for proposal submission, you may call Purchasing at 972.487.3009 during normal operating hours. |
| 4 | If GISD will not accept email submissions, can you please clarify which address should be used to ship via UPS/FedEx and what special instructions should be provided to the delivery person? | See section 1.1.4. Number of Copies. If assistance is required for proposal submission, you may call Purchasing at 972.487.3009 during normal operating hours. |
| 5 | Due to COVID, are you still seeking a hard copy proposal as well as electronic delivery? | Yes. See section 1.1.4. Number of Copies and section 4. Proposal Responses. If assistance is required for proposal submission, you may call Purchasing at 972.487.3009 during normal operating hours. |
| 6 | Can we safely say that all vendors who have submitted questions (per section 1.1.3), the answers to these questions from everyone will all be posted on your website on Oct 27th at or by 4pm CST? | Yes. |
| 7 | How should the variable nature of the implementation/upgrade estimates be handled/quoted before the assessment work has taken place? Given the scope of the potential AME changes and the next gen reporting framework are variable and “to be determined” based on the results of the assessments, does GISD wish to see a range (high and low cost) within the not to exceed pricing section? If so, this can then be refined based on the outcome of the assessments. | Regarding Appendix B – Price Proposal Form:  Please provide a fixed not-to-exceed price proposal for Phase 1 scopes of work:   * ERP Assessment and Upgrade * Enterprise Reporting Tool Solution Assessment, Upgrade and Deploy   GISD prefers a fixed not-to-exceed price proposal for Phase 2 scope of work. However, if necessary, vendors may provide a variable (low/high range) not-to-exceed price proposal for Phase 2 scope of work (refer to Question 19 on AME scope intent):   * Assess and Streamline Document Approval Flows   Any significant scope changes would be addressed in the Change Order process. GISD’s goal is to remain on scope and avoid any Change Orders, especially impacting budget and/or risk. |
| 8 | Is the first page of the RFP required to be returned with proposals? If so, what should be provided in the blank below?  DELIVERY DATE IS \_\_\_\_\_Business Days ARO | Yes, include the first page of the RFP with your proposal submission. The “DELIVERY DATE...” statement is not applicable to this RFP and may safely be ignored. |
| 9 | The RFP asks for vendors to provide a comprehensive Duns & Bradstreet report. A comprehensive report from the DNB is a paid service. Would GISD be open to accepting a report straight from the SBA instead? | In lieu of a D&B report, please provide your unique 9-digit D-U-N-S Number for your business. |
| GENERAL | | |
| 10 | Is this a budgeted project? If yes, can the school district let us know what the budget or even budget range is? | Per the instruction sheet, under section 2. Value of Contract: The estimated value of this contract is $1,000,000 - $2,000,000. |
| 11 | Can GISD accommodate a 3-day downtime window? | If necessary, yes, but GISD would like to minimize any downtime. As presented in the RFP, the target go-live date for Phase 1 is Monday, 11/29/2021. GISD is closed for business Thanksgiving week, 11/22/2021 - 11/26/2021, which would be the target cutover window. GISD is open to reasonable timeline suggestions from the vendor and seeks to finalize a contract and a detailed Statement of Work between 1/13/2021 - 2/5/2021. The project plan would further be discussed pre-award, between 2/5/2021 - 2/26/2021 and solidified within the first 20 business days of project start (by approx., 3/26/2021). |
| 12 | What % utilization can be assumed for GISD support staff? Please list roles and % utilization particularly for DBAs and Developers who will work on the project. | See also, Question 26, regarding pre-upgrade, code remediation project.  The Oracle EBS operational footprint is supported by GISD’s in-house technology team, consisting of the following FTE’s:   * 1 Director * 3 Business Analysts (Func/Tech) * 1 Technical Solution Architect * 2 Developers * 2 DBAs * 1 Admin/Support   That said, the vendor is primarily responsible for delivery of the project. GISD’s primary role is providing ongoing enhancement and support of its Production environment, and secondary role participating in both phases described in the RFP. The GISD in-house team can be expected to be actively engaged in both phases, on an as available basis. We have a capable team and will assist whenever possible. Here are some Phase specific guidelines that should assist in resource planning:  **Phase 1 (EBS Upgrade)** - due to our pre-upgrade, code remediation project, we do not expect much development work in this phase. However, 2 developers will be available as at least .25 FTEs each. 1 DBA will be available as at least a .25 FTE. The BAs and Technical Solution Architect would also be at least a .25 FTE.  **Phase 1 (Discoverer Replacement)** - expectation is for 2 developers to be available as at least .5 FTEs each. Ideally, the GISD development team is more hands on for this project, but it also depends upon the proposed solution design and developer capability. 1 DBA will also be available as at least a .5 FTE. The BAs and Technical Solution Architect would also be at least a .25 FTE. OBIEE/OBIA are still new to GISD and we see this project requiring heavy guidance with solution design, configuration, and development best practices, but DBA tasks should be relatively easily accommodated (with guidance).  **Phase 2 (Streamline AME iProcurement Approvals)** - expectation is vendor to provide a strong Functional consultant for requirements gathering, solution design, etc., and with knowledge of iProcurement and AME. GISD can commit at least a .5 FTE Business Analyst and 1 full FTE developer. GISD does NOT need vendor to provide a technical resource (developer) for this project. |
| 13 | The DBA was not listed as a key resource to be on site during key phases. Please confirm that the DBA is 100% remote or let us know if the DBA needs some time on site. | GISD is interested in vendor suggestion/recommendation for DBA on/off site requirements based upon vendor’s prior experience and what drives successful projects. If having the DBA onsite for key phases/dates minimizes risk and increases project success rate, GISD is interested in vendor building this into the plan and price proposal. Here are some Phase specific guidelines to consider in your proposal:  **Phase 1 (EBS Upgrade)** - GISD believes DBA could be 100% off site, but open to recommendation around key dates.  **Phase 1 (Discoverer Replacement)** - GISD believes DBA could be 100% off site. GISD is interested in a portion of time on site for key OBIEE resource (e.g., Solution Architect and/or other key resource(s) for requirements, analysis, and overall solution design)  **Phase 2 (Streamline AME iProcurement Approvals)** - DBA not needed. |
| 14 | Would GISD like us to include the installation of the Enterprise Command Centers which are included in your EBS license but do require an additional web server? If you are not sure, should this be included in assessment discussions? | GISD would like to consider one or more Enterprise Command Centers (ECCs), which should be included in the assessment. The intention is to evaluate ECC stakeholder value, then decide whether one or more ECCs will be included in scope or pushed to a latter phase. |
| 15 | In addition to the in-house team, are there any Oracle SIs supporting GISD's Oracle systems (EBS, database, middleware and/or BI application) currently? | No. |
| EBS FUNCTIONAL | | |
| 16 | Many new features in 12.2 are optional. Typically, we will review opportunities in the assessment as stated in the RFP and then implement any opportunities discovered which fit into the existing upgrade timeline and identify other opportunities as future scope. Is this an acceptable expectation for GISD in order to meet the best possible upgrade date? | Yes, GISD will be seeking identified value and opportunities from the assessments, but will ultimately need to balance with scope, time, and resources. |
| 17 | Which components of Oracle Projects are utilized? Project Costing? Project Billing? Project Management? Grants? | Project Costing and Project Billing |
| 18 | Other than the need to streamline AME, can GISD identify any other significant pain points or concerns that need to be addressed. | Source to Contract (S2C) business process flow  Warehouse Inventory Control business process flow and considerations for barcoding and improving operations |
| APPROVALS MANAGEMENT ENGINE (AME) | | |
| 19 | iProcurement AME – Would GISD consider simplifying the approval routings to reduce the number of rules or is the requirement to change the design to simplify the rules keeping the existing approval routings? | Yes, GISD is open to simplifying business rules and approval routings, assuming the proposed solution design meets stakeholder requirements. Again, GISD’s primary goal is to balance improvements for timing of Requisition to Purchase Order (i.e., minimize approvers), strive to standardize rules across campuses/departments (i.e., minimize exceptions to standards), and ensure overall District approval requirements are being met, while improving support and sustainability of the approval solution (i.e., minimize rule changes caused by workforce changes). GISD is open to a complete rewrite of its existing rules, rebuilding from ground up, starting with approval requirements and policies. |
| 20 | Please provide the AME setup report for iProcurement transaction types in use available in the Approvals Management Business Analyst responsibility under “Quick Links”. | Refer to attachments:  Setup Report\_jsp Intern Req.htm  Setup Report\_jsp Purch Req.htm |
| DBA/ARCHITECTURE | | |
| 21 | Is a Linux upgrade in scope? | Yes, Linux must be upgraded as part of the scope. |
| EBS DEVELOPMENT | | |
| 22 | Who will update GISD’s customizations and extensions to comply with R12.2 requirements? Is this a contractor responsibility or shared with internal GISD developers? | This will be a shared responsibility, see response to Question 12 on resource expectations and utilization. |
| 23 | You do not identify any OA Framework extensions in your list of customizations and extensions. Please confirm there are no OAF extensions, particularly on iProcurement pages. For reference, OAF extensions are built in jDeveloper. | GISD has no extensions of Oracle seeded OAF pages. GISD does have 1 OAF customization in Production, but it is not currently/actively being used. |
| 24 | Can you provide a list of OAF personalizations? Please use the query in [MOS ID: 1292611.1 Query 3](https://support.oracle.com/CSP/main/article?cmd=show&id=1292611.1&type=NOT). | Yes. Refer to attachment: q3\_gisd\_personalization\_customizations\_list.xlsx |
| 25 | Can GISD provide the output of the 12.2 readiness reports as documented in [MOS ID: 1531121.1](https://support.oracle.com/epmos/faces/DocumentDisplay?_afrLoop=204035795423646&id=1531121.1&_adf.ctrl-state=12kw4f1wun_349)? | Yes. Refer to attachment: adzddbcc\_gisd\_readiness\_report\_output.lst |
| 26 | Does GISD plan to comply with Minimal or Full compliance standards? (We recommend full compliance.)   1. Minimal (Longer patching down time/less work during upgrade) 2. Full Compliance (Shorter patching down time/more work during upgrade and learning curve for developers) | Full Compliance – GISD is currently undergoing a pre-upgrade, code remediation project to address all P1, P2, and P3 violations . If all goes as planned, we will be complete by 2/26/2021, prior to Phase 1 of the EBS Upgrade project beginning. |
| DISCOVERER/OBIEE/OBIA | | |
| 27 | Can GISD provide a list of Analytics installed? | OBIA - Procurement, HR, Finance;  Note: OBIA is installed, but may not necessarily be configured correctly. OBIA is not currently being utilized in Production. |
| 28 | Is the install base with Oracle Data Integrator as the ELT or Informatica as the ETL? | Oracle ODI and ELT |
| 29 | Can GISD identify #Count of customizations to OBIA analytics by type, as in ETL/ELT, OBIEE rpd customizations to out of the box content, reports and dashboards etc.? | As delivered and out of the box.  Note: OBIA is installed, but may not necessarily be configured correctly. OBIA is not currently being utilized in Production. |
| 30 | What is the count of number of Users using OBIA? | OBIA is not currently being utilized in Production. |
| 31 | Are there any operational reports from OBIEE connecting directly to EBS today? | No |
| 32 | Can GISD describe the security configurations of OBIEE/OBIA in operation today (SO/LDAP integrations etc.)? | OBIEE LDAP |
| 33 | Is Usage tracking enabled? | Yes |
| 34 | Has GISD licensed Visual Analyzer with OBIEE12c? | GISD has Visual Analyzer licensed with OBIEE 11g; unsure if that license transfers to 12c after an upgrade. |
| 35 | Can GISD elaborate on number of Business Areas with each module in Discoverer? | Custom Business Areas:   1. GISD Custom Items and Folders 2. GISD Inquiry 3. GISD Payroll Costing 4. GISD Learning Management 5. GISD Financials 6. GISD Procurement 7. GISD HRMS 8. GISD BI Financials 9. GISD Sourcing 10. GISD EBS Data Warehouse   Other Standard/seeded folders are also customized |
| 36 | There is no auto-mechanism to migrate Discoverer related workbooks and worksheets, once the Business Areas are migrated, is GISD’s expectation that the Vendor re-create those workbooks/worksheets in OBIEE?   1. If GISD developers are to support, what percent should we account for in our plan? | Yes. GISD is expecting the vendor to propose a recommended solution using OBIEE/OBIA/OAS as the reporting replacement solution for Discoverer. See response to Question 12 on resource expectations and utilization. |
| 37 | What percent of time would GISD allocate for its Infrastructure and Linux Admins to support installation of OBIEE/OBIA infrastructure, if any? | See response to Question 12 on resource expectations and utilization. |
| PBCS | | |
| 38 | What functionality is built into PBCS in the current state:   1. Financial planning - Revenue & Opex? 2. Detailed Workforce Planning? 3. Capital Expense Planning? 4. Projects Planning? | Financial Planning – Revenue & Opex  Position Budgeting |
| 39 | Define existing data sources for PBCS in the current state:   1. Source for Actuals? 2. Source for Employee salaries and Headcounts data, if hosted in PBCS? 3. Source for Capital projects baseline from PPM, if hosted in PBCS? 4. Source for Asset related information, if hosted in PBCS? 5. Other manual entries, if any? (excluding any input using web/data forms) 6. Data feed from consolidations or Essbase, if exists? | GISD does not believe this is relevant to the Oracle EBS upgrade, however:   1. Source for Actuals?    1. Oracle EBS 2. Source for Employee salaries and Headcounts data, if hosted in PBCS?    1. Oracle EBS 3. Source for Capital projects baseline from PPM, if hosted in PBCS?    1. N/A 4. Source for Asset related information, if hosted in PBCS?    1. N/A 5. Other manual entries, if any? (excluding any input using web/data forms)    1. N/A 6. Data feed from consolidations or Essbase, if exists?    1. N/A |
| 40 | How does the source data get loaded from on-prem systems to PBCS? File-based or FMDEE/ODI? | File-based, batch using EPM Automate |
| 41 | Is there any 3rd party ETL tool currently being used for assisting data translations for EPM related data? | No |
| 42 | Does client push back finalized/approved budgets/forecasts from PBCS back to ERP or any other system? | Currently, only using Journal Wizard to load budget journals. |