**ADDENDUM 1**

DATE: April 19th, 2016

PROJECT: PeopleSoft Campus Solutions 9.2 Upgrade Partner

RFP NO: 744-R1617

OWNER: The University of Texas Health Science Center at Houston

TO: Prospective Proposers

This Addendum forms part of and modifies Proposal Documents dated, March 28, 2016, with amendments and additions noted below. The following questions were received prior to the question deadline:

1. It is our understanding that UTS has implemented an older PeopleSoft EPM BI solution for reporting over a data warehouse sourced from Campus Solution 9.0.  Given the use of the term “OBIA” in the RFP, we would like some clarity on how to interpret the BI portion of the RFP.  We see two different approaches.  Please let us know which of these is the scope of services being requested:

1.   Upgrade the existing solution to extract the same data out of Campus Solutions 9.2: This approach means there will be no changes to the OBIEE reporting solution.  The changes will be limited to modifying the DataStage ETL process to extract the same data elements from Campus Solutions 9.2.  Note that Psft EPM is a sunset product, and there is no actual “upgrade” for this solution.

2.   Replace the current Psft EPM OBIEE solution with the new Oracle BI Application (OBIA) Student Information Analytics solution.  This would be a net new implementation and is the BI solution that Oracle sells for Campus Solution 9.2.  This prebuilt solution generates a different data warehouse and is loaded with Oracle Data Integrator (ODI).  We could leverage the existing implementation to help expedite reporting requirements, but this would be  new implementation.

#2 is the approach we are requesting.

2. In the section 5.2.2, it is mentioned: “Proposer must have proven upgrade experience in academic institutions, **preferably those that are also health institutions**”.

9.2 is a fairly new product, and we don’t have the experience yet in Healthcare or Academic yet, and we are one of Oracle’s Platinum partners, with a very large PeopleSoft customer base.

Will this requirement make us less likely to be awarded?

The minimum requirement in section 5.2.2 is referring to upgrade experience in an academic setting in general (not necessarily specific to 9.2).  Section 5.2.3 goes on to specify proven experience and methodology specific to a Campus Solutions 9.2 upgrade.  Since Campus Solutions 9.2 is a fairly new release, we may find that no vendors have the upgrade experience just yet for version 9.2 in which case we will take into consideration other Campus Solutions upgrade experience

3. Would you be able to quantify the number of customizations when referring to “light /medium” by modules?

Not at this time.  A complete list of customizations (reports, interfaces, customized objects) will be

assembled prior to the start of the upgrade project.

1. Would you please elaborate on the level of staffing UTH provide to support the upgrade?
   1. Project Management

UTHealth’s Project Manager will be dedicated 100% to the 9.2 upgrade project and was also the project manager for the Campus Solutions 9.0 implementation.

* 1. Functional Subject Matter Experts

UTHealth will have Subject Matter Experts dedicated to the upgrade project.  Most all of the experts were involved in the Campus Solutions 9.0 implementation. Experts assigned to the modules as follows:

Academic Structure, Admissions, Academic Advising, Student Records – 1.75 FTE

Financial Aid – 1.75 FTE

Student Financials – 1.75 FTE

(Each of the above FTEs are experts in Campus Community)

* 1. Technical resources (DBA, network and infrastructure, developers, et al)

UTHealth will dedicate the following technical resources to the Campus Solutions 9.2 upgrade.

Developers – 3.00 FTE

DBA - .50 FTE

System Administrator - 1.00 FTE

Data Warehouse Lead – .50 FTE

Data Warehouse Analyst - .50 FTE

Data Warehouse DBA - .50 FTE

Network and Infrastructure resources will be coordinated on an as needed basis by the System Administrator

1. Do the vendor resources need to be onsite or can some of the work done remotely?  
   UTHealth prefers the vendor resources to be onsite but is willing to consider some remote work depending on the resource and the overall project plan.
2. Would you provide the detailed RICEW list that is in the production system? This will help us estimate the time and effort better.  
   As noted in the response to question #1 – A complete list of customizations will be assembled prior to the start of the upgrade project.
3. Are the customizations documented (Business process, Functional & Technical specifications)? Please indicate the level of documentation (High, low medium) for the above.  
   Business process guides exist from the Campus Solutions 9.0 implementation but may not have been electronically updated for changes made to the business processes.  Functional/Technical specifications have been documented in our change management software but range in completeness from high (very detailed) to low (bare minimum details).
4. Have you run the Compare Reports?  If yes, can you make those available in advance?  
   Compare reports will be executed during the project and provided after the first upgrade pass is complete.
5. Do you have any preferences in terms of go-live period date?  
   UTHealth is looking to the vendor to assist in the planning and determination of an appropriate go-live period based on our application, enrollment and financial aid disbursement cycles.
6. In addition to the Campus Solutions upgrade, are there any plans to upgrade/change the hardware/software for the required infrastructure - web, application, database servers?  
   Software will be upgraded according to the requirements listed for PeopleTools 8.55.  Web and applications servers are virtual and the OS may need to be upgraded to support tools 8.55.  Database will be migrated from Oracle 11G to 12C RAC as part of the project.
7. What role is the UTH planning to take in testing, change management and go-live support?   
   UTHealth will have resources dedicated to the testing, change management and go-live support (see response to question #2).
8. Can your team please provide additional information about the As-Is landscape for OBIEE?

We have implemented the following data marts:

Admissions

Campus Community

Student Records

Student Financials

The following customizations have been added (bug fixes are not listed):

* OBIEE - UT Student Records Dashboard
* OBIEE - Deans Reports Dashboard
* OBIEE - GBMI Dashboard
* OBIEE - GBMI Enrollment Dashboard
* OBIEE - MDS-SHP Dashboard
* OBIEE – Set up Permissions groups to restrict access
* OBIEE – Set up row level security by creating a Session Variable USER\_CAREER\_CODE and adding 92 Filters for security by Role by Subject Area
* OBIEE – Hid National ID from end users, except Registrar’s Office
* OBIEE – Added SQL to omit Deleted Ethnicity rows in D\_ETHNICITY dimension
* ETL & OBIEE: Add Academic Plan Folder to the Class Enrollment Subject Area
* ETL & OBIEE: Add the Academic Program Campus ID to the Academic Program Folder in Class Enrollment Subject Area (In Development)

1. Our policy is to use authorized signatories electronic signature as our authorized signatories are located throughout the US.  Would it be acceptable to use the authorized signatory’s electronic signature on the required forms?  We have an approval process in place in order to use the signature of the person authorized to sign and bind.   
   Yes, that will be acceptable.

14.  Would the University please consider a one week extension to the current Submittal Deadline of April 28, 2016?

Yes – we will grant a one-week extension. The new proposal and HUB Plan deadline will be

Thursday, May 5th, 2016 at 2PM.

15.  Is there a website where addendums to RFP 744-R1617 will be posted or are they distributed via email?  
Yes – addendums will be posted on this website - <https://www.uth.edu/buy/bid-list.htm> - under the Attachments column of the RFP.

16. Kindly provide a telephone number for purposes of FedEx delivery, required by FedEx.

713-500-8056

17. The project expected start date is September 2016; what is the target implementation go-live date(s)?  
See the response to question 9.

18. Please provide a detailed architecture of all the applications and databases pertaining to the current BI landscape.  
EPM DB Installed on AIX server and is running Oracle 11g R2. Datastage also installed on its own AIX server. OBIEE running from AIX server as well. All components for OBIA to be installed on OEL v6.5 or 7 Virtual Machines or physical servers as deemed necessary. DB's will run on Oracle 12C.

19. Please specify all data sources apart from PeopleSoft that feed data into the OBIEE data warehouse

None at this time

20. Does OBIEE warehouse feed data to any downstream system? Please provide details

No

21. What ETL tool is being used for data transfer between source and target (DW) systems?

Currently running Datastage 8.1, planned implementation on ODI for OBIA

22. Please provide the number of ETL interfaces/mappings/jobs that exist today

Current ETL Interfaces and Maps correspond to the delivered ETL as part of EPM 9.1. This is approx 550 jobs in Datastage

23. Please share the version details of BI/EPM platform (OBIEE, ODI, Hyperion…etc)

EPM 9.1, OBIEE 11.1.1.7.141014 and DataStage 8.1

24. We understand that UTHSC's objective is to migrate the existing OBIEE foundation suite to Oracle BI Applications (OBIA)…please provide details of the existing OBIEE as well as EPM landscape details.

We have implemented the following data marts:  
Admissions  
Campus Community  
Student Records  
Student Financials  
  
The following customizations have been added (bug fixes are not listed):  
• OBIEE - UT Student Records Dashboard  
• OBIEE - Deans Reports Dashboard  
• OBIEE - GBMI Dashboard  
• OBIEE - GBMI Enrollment Dashboard  
• OBIEE - MDS-SHP Dashboard  
• OBIEE – Set up Permissions groups to restrict access  
• OBIEE – Set up row level security by creating a Session Variable USER\_CAREER\_CODE and adding

92 Filters for security by Role by Subject Area  
• OBIEE – Hid National ID from end users, except Registrar’s Office  
• OBIEE – Added SQL to omit Deleted Ethnicity rows in D\_ETHNICITY dimension  
• ETL & OBIEE: Add Academic Plan Folder to the Class Enrollment Subject Area  
• ETL & OBIEE: Add the Academic Program Campus ID to the Academic Program Folder in Class Enrollment Subject Area (In Development)

25. What modules of EPM are being used today? Is Hyperion being used for EPM? If Hyperion is being used then, would UTHSC like to migrate the essbase cubes to OBIA?

We have implemented the following data marts:  
Admissions  
Campus Community  
Student Records  
Student Financials  
Hyperion is not used.

26. If Essbase is being planned to be migrated to OBIA warehouse then please provide details on existing essbase cubes including their numbers and complexity?

Not Applicable

27. Is Hyperion Planning being used with Essbase for planning, budgeting and forecasting activities?

Not Applicable

28. Is Hyperion Financial Management (HFM) module being used as well? Please provide the existing functionality of these modules, if they are part of the existing landscape.

Not Applicable

29. In case Hyperion Planning and HFM exists today, will this also need to be upgraded? Please provide the details around their versions

Not Applicable

30. Please provide the details of all the entities of PeopleSoft Campus module that feeds data into the current data warehouse.

Data is limited to the delivered datamarts for Admissions, Campus Community, Student Records and Student Financials.

31. Please provide the details of all the reports being used in PeopleSoft Campus module including number of reports, types of reports & their complexity

Moving the existing reports within Campus Solutions to OBIA is not within the scope of this upgrade.

32. Are there any scheduled reports and are they delivered to recipients?

No

33. Are there any Mobile BI reports that exists today and/or does UTHSC plan to create any new mobile BI reports in the upgraded environment?

Not at this time

34. Are there any Oracle BI Publisher reports that exist today and/or does UTHSC plan to create any new BI Publisher reports

Not within the scope of this project.

35. What is the data volume in the current EPM/BI warehouse? Is all of the data need to be migrated to the OBIA warehouse?

We have implemented all 4 DataMarts in EPM for the Campus Soluions system with a few minor customizations. The scope of this project is to implement all source data from Campus Solutions to match what is currently being provided to our Campus users. There is no HR or FMS data in the warehouse at this time. UTHSC is a school of only ~5000 students. The data volume is not excessive.

36. For pricing and financials, UT Health Science Center has requested prices for Time and Materials with a ceiling. Is UT open to other pricing models, and will not following this pricing model penalize us in our bid response?

We would prefer to stick with this pricing model. This helps us to compare pricing across bidders to come up with a score for the pricing component of the bid. Pricing should be submitted in the format of Section 6.

37. Are there any data sources outside of Campus Solutions 9.2 that we would need to integrate into the OBIA SIA data warehouse and BI solution? If yes, please provide some details on the needed reporting content and integration with CS data.

No

38. Will the new OBIA SIA data warehouse and OBIEE reporting solution completely replace all existing OBIEE reporting? Yes

Or, will the team have to work through the process of combining other existing (non-student) OBIEE content into the out-of-the-box OBIA RPD and web catalog? No

If the effort to combine other reporting subject areas is required, please describe the data sources, RPD, and reporting content that will have to be integrated. N/A

39. Which student reporting subject areas have been implemented in the current reporting solution? (e.g., recruiting, admissions, registrar, student financial aid, etc.)   
Admissions, Campus Community, Student Records and Student Financials Data marts

40. Are there any planned/ desired subject areas (activities) that will be implemented with the new OBIA solution that were put “on hold” or never implemented in the current reporting solution?

No

41. Approximately how many OBIEE dashboard pages and reports are in use today?

**Totals**

Dashboards:         8

Pages:                  29

Reports:              70

**Dashboards**

Admissions:                        4 pages, 6 reports

Student Records:              4 pages, 11 reports

Student Financials:           2 pages, 3 reports

Deans Reports:                 3 pages, 9 reports

GBMI:                                  7 pages, 20 reports

GBMI Enrollment:             2 pages, 11 reports

MDA-SHP:                          3 pages, 3 reports

Registrar:                           4 pages, 7 reports      

42. OBIA uses Oracle Data Integrator (ODI) as its Extract, Transform, and Load (ETL) tool (compared to DataStage in the old EPM solution). Does UTHealth plan to send any of its team members to ODI training to assist with the implementation?   
Yes, our current EPM ETL FTE will be sent to ODI training prior to project kickoff. This FTE will be responsible for knowledge transfer and ODI processes after the project is complete

43. Does UTHealth have an OBIEE/RPD developer who will assist the team?   
The following will be assigned to upgrade project.

Data Warehouse Lead – .50 FTE

Data Warehouse Analyst - .50 FTE  
Data Warehouse DBA - .50 FTE

44. How big is the current data warehouse, and how many years of data are loaded? Does UTHealth plan to load all of this data into the new data warehouse?   
Current EPM Data Warehouse DB is approx. 30Gb. The OBIA implementation will require loading of all data in Campus Solutions system to OBIA. Currently, Campus Solutions contains approx. 4 years of data since go-live and historical data back to approx. 1997. All data will be considered as part of the OBIA implementation

45. How often is data refreshed? Does UTHealth plan to change this frequency with the new solution?   
Nightly and No

46. How many OBIA environments will the SCI team install and load (e.g., Dev, Test, Prod, etc.)? Have any decisions been made regarding the planned hardware and setup of the Data Warehouse database environments?   
Hardware has been allocated to support the OBIA and the associated DB’s for implementation. All components will be on OEL 6.5 or 7 and either Virtual or Physical as deemed necessary. UTHSC FTE allocated to the project for the Data Warehouse will assist with all aspects as necessary but the final goal would be to have a working Dev Test and Production system and the conclusion of the project. Oracle DB will be 12C

47. On page 10 of the RFP, UTHealth asks for a complete and identical copy of its entire proposal on CD-ROM. Would UTHealth accept a complete and identical copy of our entire proposal on a USB flash drive instead?

Yes – that will be fine.

**END OF ADDENDUM 1**