Questions and Answers
Discoverer Replacement RFCSP # 1469
Updated April 20, 2017

Questions and Answers will be updated on this document as they are received

**Question 1:** How many users would be accessing the replacement tool?

- Would you be able to break these users down into categories: HR, Purchasing, Finance, Grants?
- Or, based on how many are using each OEBS module (Human Capital Management, Payroll, Purchasing, Standard Benefits, Inventory, Accounts Payable, Accounts Receivable, General Ledger, Project Accounting, Grants, Fixed Assets, and Cash Management.)?

**Answer:**
HR (including HR, Payroll and Benefits): 12
Purchasing: 5
Finance: 6
Grants: 3
These are counts based on primary job function. However some functions overlap – e.g. the Grants user can have access to Finance and vice versa. We may want to increase the user count base for reasons including, but not limited to, the functionality of the replacement product, licensing, support costs etc..

**Question 2:** Are you planning upgrading the database from 11.2.0.4 anytime soon? If so, which version would you be upgrading to?

**Answer:** Database (and other) upgrades will continue to occur periodically. The version of the database is dependent of Oracle’s recommendation for RISD’s version of the Oracle eBusiness suite (currently OEBS ver. 12.1.3).

If the product being proposed in response to this RFQ has constraints with regard to the version of the Oracle database this should clearly be specified in the response.

**Question 3:** We have a question regarding the references section. [We have] a few different references for solutions similar to this scope, however, they are not in Texas and are also not K-12 customer. Our question is, seeing that references is weighed at 20 points, is RISD willing to consider non K-12 customers outside of the state of Texas?

**Answer:** Yes, non K-12 customers outside of Texas will be considered.
Section 2.13, Page 7 of original solicitation: Vendor must submit with the Proposal a list of past installations of comparable size, in a K-12 environment, along with current contact names and telephone numbers.

Changed to: Vendor must submit with the Proposal a list of past installations of comparable size, along with current contact names and telephone numbers.

Question 4: Will the district consider products that do not integrate with BI Publisher?

Answer: Yes

Added 4/13/17

Question 5: Will ISD allow vendors to bid implementation and services separate from licensing if such licensing and services options are from a coordinated set of partners?

Answer: Yes

Question 6: Response delivery – Can we deliver in person to you if more convenient

Answer: Yes

Question 7: Can you clarify dates on the anticipated contract award, contract startup meeting, contract finalization, anticipated project start date. I realize these may be uncertain at this time so could you identify if these things happen between the vendor presentations on 5/8 & 9 and the board meeting on 6/12 or will they occur after the board meeting?

Answer: RISD anticipates that a recommendation will be presented to our Board on June 12, 2017. Contracts and startup processes will not occur until after June 12, 2017.

Added 4/18/17

Question 8: Regarding initial Implementation, what environments would be considered in scope for the software implementation Test, dev, production, etc?

Answer: The implementation will involve the converting of Discoverer view and reports to provide similar information in the new system. Implementation will be carried out in a test instance and following signoff will be deployed in Production.

Question 9: Are these environments in place today?

Answer: Yes
Question 10: What resources will RISD take responsibility for in the implementation?
   a. Purchase, Installation and configuration of servers?
   b. Operating System implementation and administration?

   **Answer:** The RFQ is specifically for the procurement and deployment of the product (licensing, support, implementation costs). If specialized hardware or platforms is necessary, this should be detailed in the response. The vendor will provide installation and configuration support for the product and train RISD personnel on this so that they can independently maintain the product.

Question 11: How is Discover deployed (Views or custom logic)?

   **Answer:** Discoverer views –both seeded and created by RISD - provide the framework for reporting.

Question 12: Are existing reports to be converted based on Real time reports against production tables or views on EBS or are there reports based on an ODS or Data warehouse integrated from the raw data sources?

   **Answer:** The existing reports to be converted are based on Real time reports against production tables or views on EBS.

Question 13: How many Discoverer Workbooks are actively consumed by users and are to be replaced/migrated

   **Answer:** Around 100 workbooks are actively consumed by users. Either all of these or a representative sample will need to be replaced or migrated.

Question 14: How many worksheets (reports) are part of the above mentioned Discoverer workbooks?

   **Answer:** Most workbooks have one worksheet associated with them. However the proposed solution should have the ability to associate multiple worksheets to a workbook.

Question 15: What is the replacement strategy? Lift & Shift or Consolidation?
   c. Lift & Shift : Convert the existing discoverer reports as is without any changes to the new reporting platform
   d. Consolidation : Use the Discoverer reports as the initial driving point and gather additional user requests to consolidate the new report requirements and build fresh

   **Answer:** A Lift & Shift approach will be adopted for the existing reports.

Question 16: The RFP states specific modules from various Oracle Software Modules running in the following environment. Can we conclude that the scope for initial implementation and conversion of existing reports is limited to this environment?
   e. Oracle VM: 3.4.2
   f. OS: Oracle Linux 6 64-bit
   g. Database: 11.2.0.4
Answer: The environment listed is currently in place and will likely be the implementation environment. While it is anticipated the Application will remain in 12.1.3, the vendor should provide compatibility to version 12.2 in the response.

The other environmental objects – Oracle VM, OS and Database may undergo an upgrade depending on the length of time before implementation begins.

**Question 17:** Are there any reports to be converted where the data resides in other data-sources? If so, what other sources are involved?

**Answer:** While the reports to be currently converted are in OEBS, a proof of concept to show how reporting can be accomplished using multiple data source as described in the RPF document will need to be provided. To this end RISD may identify multiple data sources – e.g. Kronos using an Oracle Database, Student Information using a Postgres database, an SQL Server database and Excel. A few (~5) sample reports will need to be created using these data sources.

**Question 18:** Does Discoverer use for reporting any Multi-dimensional data sources?

**Answer:** Discoverer does not use multi-dimensional data sources currently. However if the product being proposed has the capability to report from multi-dimensional data sources, the capability should be included in the response.

**Question 19:** Does Discoverer reports offer Real-time reporting (using OLTP - EBS as source) or Historical/Analytical reporting(using DW)?

**Answer:** Currently Discoverer reporting is accomplished using real time views on the OEBS database. While Historical/Analytical Reporting is not done via a data warehouse presently, if the product being proposed has this capability it should be included in the response.

**Question 20:** How many hierarchies are defined in the Discoverer EUL that are used by the workbooks to be migrated?

**Answer:** Most of the hierarchies defined originate from the Oracle Business Intelligence views both seeded and created by RISD. An understanding of the Oracle EBS data model will give an insight into the hierarchies employed.

**Question 21:** How extensively are Calculated fields used in the Discoverer reports? (Heavy Usage / Moderate Usage / Low Usage)

**Answer:** Moderate
**Question 22:** Can a extract file (.EEX) be generated and shared with KPI for further review of the discoverer End user Layer?

**Answer:** Not at this time.

**Question 23:** Can remote US based labor be leveraged on the conversion?

**Answer:** While remote US based labor can be leveraged, the response should explain how RISD’s data will be safeguarded and work will be managed.

**Question 24:** Will RISD support remote VPN connectivity to the vendor?

**Answer:** VPN connectivity can be provided.

**Question 25:** Can offshore labor be leveraged for the conversion to mitigate cost?

**Answer:** If off-shore resources are a part of the proposal, the response should explain how RISD’s data will be safeguarded and work will be managed.

**Question 26:** Training: Is RISD looking for curriculum based classroom training, web based training or onsite custom training or all of the above?

**Answer:** Training requirements will depend on the type and complexity of the solution proposed. It is expected that the technical staff will receive hands on training during the implementation to become proficient with the product from a maintenance (installation, upgrade), development and usage perspective.

Structured end user training is a plus.

On-line help, documentation, and videos are a plus.

It is expected that product documentation is readily available and accessible by RISD. Documentation specific to RISD’s implementation is required.

**Question 27:** How much data will you be reporting on (in GB or TB)? How much are you predicting this data will grow by year over year?

**Answer:** 170 GB. It grows approximately 10 GB per year.
**Added 4/20/2017**

**Question 28:** Are you open to use a data integration tool to move the data to a cloud database?

   **Answer:** Cloud is acceptable given that the cloud database is secured and has SOC2/SOC3 audits available for RISD review.

**Question 29:** With regards to the “canned” reports, how extensive of a canned report portfolio are you looking for beyond the reports that are already in Discoverer?

   **Answer:** Undetermined at this time. As the need arises we should have the ability to develop and deploy canned reports.

**Question 30:** Would you like to use a Data Warehouse or have a real-time reporting tool hitting the transactional databases?

   **Answer:** RISD prefers real-time reporting on the transactional database.

**Question 31:** How is the 170GB data being distributed among EBS, Oracle, SQL server, Postgres and other databases?

   **Answer:** The 170GB is EBS only. For the purposes of this RFP, the need is for the migration of existing Discoverer assets to a new reporting tool. The ability to connect to data sources beyond OEBS is secondary to this goal.

**Question 32:** How long do you have to retain reports online (archive of reports)?

   **Answer:** Currently users can run a Discoverer report and download the data as needed. The download serves as the archive and the user retains it as long as necessary. The report/worksheet definitions are permanently stored.

**Question 33:** How long do you have to retain reports for recovery (archive of reports)?

   **See answer above.**

**Question 34:** How large is the data set that is reviewed for real time reporting?

The Oracle E-Business suite has been in use at RISD for over 16 years and data exists for this time period. The data consumes 170GB and grows at approximately 10GB per year.

**Question 35:** What are the number of unique reports by Oracle EBS module?

   **Answer:** Around 100 worksheets/reports are being used currently
90 – HR/Payroll/Benefits

10 - Finance

**Question 36**: What are the approximate data volumes (data size, # of rows) in source databases?

It varies from the thousands to the millions

**Question 37**: What is the frequency of data updates in EBS (daily, weekly, etc.)?

Daily

**Question 38**: What are the number of expected simultaneous users?

Currently there can be up to 20 simultaneous users.

**Question 39**: Is the new platform to be installed in Richardson ISD facilities or in another environment?

Both on-premise and cloud based solutions will be considered.

**Question 40**: How are project milestones established? How many milestones are anticipated?

The main objective of the project is to replace Discoverer. Given that there are around 100 actively used worksheets/reports, the major milestone would be the conversion of these worksheets into the new platform. Optionally a representative sample of the reports could be converted and requisite training provided to RISD’s IT Staff and users to convert the rest of the reports.

**Question 41**: How many of the users are creating their own reports currently?

Users run worksheets and filter data for their specific needs.

Worksheets are created using pre-built and custom views and data produced is downloaded to Excel.

**Question 42**: How many reports are currently being created by Richardson ISD IT Department?

Currently about 100 worksheets are being used by the various users.

**Question 43**: 1a. Are the expectations that the various departments will be able to create their own reports? 1b. What percentage of reports will be created by these users?

Users can build or reuse previously built worksheets using pre-defined views and use filters to produce the data needed. Most of the reports are created this way.

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<thead>
<tr>
<th>Question</th>
<th>Response</th>
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<tbody>
<tr>
<td>How soon after the targeted Board approval date of June 12th would the District like to start?</td>
<td>August 2017</td>
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<tr>
<td>Question</td>
<td>Answer</td>
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<tr>
<td>What is the District’s targeted deployment or project completion date?</td>
<td>3 months after project start</td>
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<tr>
<td>For the targeted users, how many (or %) will be creating reports/charts/dashboards on their own?</td>
<td>We have about 25 users of Discoverer. Most of whom are able to build their own Discoverer reports. We expect each of them will continue to want to create reports as needed. Dashboards and charts may come later as the users gain confidence with the new tool.</td>
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<td>Has the District seen Oracle BI Cloud Service (BICS)? If so, does RISD consider Oracle BICS a viable solution for this reporting need?</td>
<td>We have not seen BICS. We will consider a cloud solution.</td>
</tr>
<tr>
<td>Has the District seen the standalone Oracle Data Visualization Cloud Service (DVCS)? If so, does RISD consider Oracle DVCS a viable solution for this reporting need?</td>
<td>We have not seen DVCS. We will consider a cloud solution.</td>
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<td>Has the District seen the EBS-content packs for Oracle Data Visualization Cloud Service (DVCS)? If so, does RISD consider these content packs as a viable solution for the ‘pre-built content/canned reports’ need?</td>
<td>We have not seen the EBS-content packs for DVCS. We will consider a cloud solution</td>
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<tr>
<td>Has the District previously attempted a Discoverer migration effort? If so, please explain reasons for its discontinuation.</td>
<td>We have not previously attempted to migrate from Discoverer to another reporting tool.</td>
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