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Request for proposals: I-2020-0002

Questions regarding the RFP and Answers

May 29, 2020

Question 1: Does NJSIG currently uses the Fluid interface, or if as a result of the upgrade will the Fluid interface will be deployed to end users?

Answer: NJSIG does not currently use the Fluid interface. NJSIG does not plan to implement the Fluid interface as part of this upgrade.

Question 2: How many NJSIG staff members (IT & Business Leads) will participate in the project and will they require training on new system functionality such as Oracle Business Intelligence Publisher (OBIEE) that is replacing Chrystal reports?

Answer: 6-8 NJSIG staff members will participate in the project. 3-4 IT staff will require OBIEE training.

Question 3: Is this a Fixed price or Hourly engagement?

Answer: NJSIG would prefer a fixed cost, but we will accept proposals with an hourly rate and estimated hours.

Question 4: Does NJSIG require Onsite or can the proposer utilize remote (Onshore) team(s)?

Answer: Proposer can utilize remote teams.

Question 5: What is the timeline for completing this upgrade?

Answer: NJSIG is looking to start the project immediately, with the go live sometime in the 4th quarter of 2020.

Question 6: Would NJSIG consider upgrading to Windows Server 2019 instead of 2016?

Answer: NJSIG is committed to a Windows 2016 upgrade.

Question 7: Would NJSIG consider upgrading to PeopleTools 8.58 instead of 8.57?

Answer: Considering on-premise installs of PeopleTools 8.58 have only recently become available, NJSIG will not consider upgrading.

Question 8: Would NJSIG consider upgrading to SQL Server 2017 to take advantage of new security capabilities for at rest and transactional data? SQL Server 2012 is not certified for 8.57.

Answer: No, NJSIG will be using SQL version 2012

Question 9: What virtualization platform and version does NJSIG utilize?

Answer: VmWare version 6.7

Question 10: What PeopleSoft Pillar(s) does NJSIG utilize? (HCM, FSCM, ELM, SA, CRM)

Answer: NJSIG currently utilizes only the FSCM pillar.

Question 11: What modules are implemented for each pillar?

Answer: FSCM: General Ledger, Accounts Payable, Accounts Receivable, Billing

Question 12: What PUM Image is the NJSIG currently at?

Answer: NJSIG does not currently utilize PeopleSoft Upgrade Manager (PUM).

Question 13: Has NJSIG considered upgrading to the latest PUM image as well as PeopleTools?

Answer: NJSIG does not currently utilize PeopleSoft Upgrade Manager (PUM).

Question 14: Can NJSIG provide a breakdown of their customizations by module, object type and counts? This excludes the 15 Crystal reports to be converted to BI Publisher.

Answer: NJSIG will coordinate a customizations report with the proposer after selection.

Question 15: Does NJSIG expect the proposer to provide functional testing resources to fully test (Integration, System, Regression, Acceptance) all customizations?

Answer: Yes

Question 16: Does NJSIG have detailed test plans, scripts and case data to fully test existing customizations that can be provided to the proposer after being selected for this engagement?

Answer: NJSIG will work with the proposer to develop test plan and scripts after selection.

Question 17: What is the user population in the production system?

Answer: Approximately 12 users.

Question 18: What is the production database size?

Answer: 15GB.

Question 19: Does NJSIG have self-service implemented?

Answer: NJSIG does not have self-service implemented.

Question 20: Does NJSIG expose PeopleSoft to the Internet?

Answer: No.

Question 21: Does NJSIG utilize Reverse Proxy Server(s), SSL and/or failover in their production PeopleSoft infrastructure?

Answer: NJSIG utilizes SSL and failover in the network infrastructure, but not specifically with PeopleSoft as it is used internally only.

Question 22: Does NJSIG have any PeopleSoft Disaster Recovery (DR) site(s) that require upgrading as well?

Answer: No.

Question 23: Does NJSIG utilize any firewalls to front-end the PeopleSoft infrastructure?

Answer: No.

Question 24: Will NJSIG or the proposer be responsible for database administration tasks?

Answer: NJSIG.

Question 25: Will the proposer be responsible for installing and configuring the complete PeopleSoft infrastructure for the upgraded environment?

Answer: The proposer will coordinate and share responsibility for installing and configuring the PeopleSoft infrastructure for the upgraded environment.

Question 26: Will NJSIG be open to suggestions on environment layout/design based on best practice for PUM application strategies to better support ongoing PUM/PeopleTools/CPU patching?

Answer: NJSIG will be open to suggestions on best practice and better ongoing patching.

Question 27: Are resumes of proposed staff needed in our response?

Answer: Yes.

Question 28: Page 4 Section 1.1 Purpose and Intent Paragraph 1. You refer to on-premise PeopleSoft version 9.2. Do you know what PUM Image level you are at with the pillars (FSCM and HCM) you want to upgrade Tools for?

Answer: NJSIG does not currently utilize PUM. The version of PeopleTools (8.53.07) currently installed utilizes PeopleSoft Change Assistant.

Question 29: Page 4 Section 1.1 Purpose and Intent Paragraph 2 You mention the following PeopleSoft applications: General Ledger, Receivables, General Ledger and Human Resource modules. Are these all of your PeopleSoft applications, or are there more? Is this Tools upgrade for both the HR and Finance modules? Can you specify the individual HR modules?

Answer: NJSIG does not currently use the PeopleSoft HR modules.

Question 30: Page 5 Section 1.5 Scope of Work. Bullet 1. You state you wish to have PeopleSoft 9.2 deployed and tested in three environments, including the database server, production PeopleSoft server and test PeopleSoft server; and, the test PeopleSoft server contains two databases, one for testing, and one for development. We have several questions related to this which we believe an architectural diagram would be best suited to address.

Alternatively – or in combination with providing an architectural diagram - specific questions include:

- When you refer to “environments” are you referring to separate Windows Server “stacks” for Production vs. Non-Production – with the Non-Production “environment” leveraged for both Dev and Test PeopleSoft instances?
- Are all architectural components (application server, web server, process scheduler) for each “environment” really on one Windows 2008 R2 Server – or are they spread across multiple Windows servers, possibly for load balancing, higher availability or performance purposes?
- Is the database server mentioned used for both Prod and Non-Prod databases – or are there separate DB servers for Prod vs. Non-Prod?

- Do you have a self-hosted PeopleSoft Demo instance somewhere that would also require a Tools Upgrade?
- If upgrading Tools on Financials and HR (vs. one or the other), is it safe to assume this means you'll need Dev, Test and Prod upgraded for both – meaning 6 total environments to migrate and upgrade PeopleTools (or 8 if also including self-hosted Demo environments)? Do you maintain a “vanilla Demo” environment as well? Would you want that upgraded?

Answer: NJSIG is referring to separate Windows stacks, with the Non-Production stack leveraged for DEV and TEST instances. All Non-Production architecture is currently installed on one Windows 2008 R2 server. Production architecture is split across two servers: a production-only database server and a Windows 2008 R2 server containing the application server, web server & process scheduler. NJSIG does not currently have an active DMO instance. NJSIG does not currently use Peoplesoft HR. This project will upgrade Financials only.

Question 31: Page 5 Section 1.5 Scope of Work. Bullet 2. This bullet states the supplier will “upgrade, deploy and test the upgrade”, yet later in the same section, Page 6, Bullet 7, you state that NJSIG will be responsible for fully testing. Please clarify.

Answer: The selected qualified vendor will be responsible for doing Q and A prior to delivering to NJSIG. NJSIG will then test the day to day business accounting functions in the upgraded test environment before acceptance.

Question 32: Page 5. Section 1.5. Scope of Work. Bullet 3. There are 15 Crystal reports needing to be migrated to BI Publisher, yet MICR config is not needed on the check template. Have you already converted checks to BI Publisher? Is there a way of estimating the complexity of these reports?

Answer: We have not converted any Crystal templates to BI Publisher. We use pre-printed check stock for our checks. We have no way of determining the complexity of the conversion of the Crystal reports to BI Publisher.

Question 33: Page 6. Section 1.5. Assumptions/Req. Bullet 1. Naturally, all impacted PeopleTools customizations will need to be retrofitted. Do you have an

idea how customized your PeopleTools objects are (High, Medium, Low)? Examples of what we're looking for includes customized PeopleTools objects such as PSOPRDEFN (tools table/records) or PTPT1000(tools permission lists).

Answer: NJSIG uses mainly delivered objects and permissions lists (low).

Question 34: Page 6. Section 1.5. Assumptions/Req. Bullet 2-3. NJSIG seems to be making the justifiable distinction between “integration” and “interfaces” whereby the supplier is responsible for integration and NJSIG for the interfaces. Please confirm what you would consider an “integration” vs. an “interface.” Is it safe to assume integration is limited to data sharing between the modules of a singular PeopleSoft instance (i.e. integration between GL and receivables within PeopleSoft Financials), and interfaces would address all data sharing between a singular PeopleSoft instance and all external applications? How would you categorize data sharing between PeopleSoft Financials and PeopleSoft HR? For any PeopleSoft to external interaction the vendor would be responsible for, please provide the technology utilized (Integration Broker, SQR, etc.)

Answer: Integration will be limited to data sharing between the modules of a singular PeopleSoft instance. There is no data sharing between Financials and HR, as NJSIG only uses Financials. NJSIG utilizes one SQR interface to handle the import of data from the underwriting system.

Question 35: Page 6. Section 1.5. Assumptions/Req. Bullets 7-8. Original: Bullet 8. Bullet 7 states NJSIG will perform all backup and/or recovery procedures throughout the project to avoid data loss; while Bullet 8 states the proposer will be capable of a full database recovery within 24 hours of a system failure. Please clarify – are you seeking DBA consulting resources in addition to other resources required to migrate and upgrade PeopleTools to new Windows Servers – or are you seeking the proposer to provide a fallback plan capable of returning to the old releases in the case of a no-Go decision?

Answer: NJSIG is not seeking DBA consulting services. NJSIG would require the proposer to have a fallback plan in case of a no-Go decision.

Question 36: Page 19. Section 3. Special contractual terms and conditions. Section 3 begins by stating that the following terms are non-negotiable. On Page 19, PAYMENT: Payment shall be made once per year based on

NJSIG's calculation of the annual fee, provided the SERVICE PROVIDER submits a duly authorized invoice at least twenty (20) days prior to the next regularly scheduled meeting of NJSIG's governing body. Is this a carry-over from some other contract or do you envision paying a one time annual fee?

Answer: This is a one-time contract, and NJSIG anticipates paying for these services once completed in a single installment.

Question 37: Understanding that PeopleTools 8.58 is certified with MSSQL 2016 and MSSQL 2017, which may cause you a DB update, is there another reason why you want to upgrade to PeopleTools 8.57 versus the more recent 8.58?

Answer: PeopleTools 8.57 is the recommended upgrade version by our current provider.

Question 38: What is the current search technology NJSIG uses (i.e., SES) Would you expect/require the chosen vendor to install and configure Elasticsearch with the migrated and Tools-upgraded PeopleSoft environments as well?

Answer: NJSIG will not require Elasticsearch.

Question 39: Section 1.5 Scope of Work, Assumptions/requirements for the project, first bullet – Page 6 of 29. The proposer shall ensure that all customizations used in NJSIG's current version of the PeopleSoft PeopleTools environments will be migrated and will be functional in the new PeopleTools/Application version Is Application (i.e. PUM Image version) change in scope? If so, what are the current and target versions of PUM?

Answer: NJSIG does not currently utilize PUM. The version of PeopleTools (8.53.07) currently installed utilizes PeopleSoft Change Assistant.

Question 40: 2.5.4 Qualifications and Experience. Is NJSIG looking for relevant past experience in public entities only in the State of New Jersey? Is this a mandatory requirement?

Answer: Prior experience with public entities in the State of New Jersey is preferred, but not required. Equivalent experience may also be taken into consideration.

Question 41: 2.5.4 Qualifications and Experience. Can vendors submit past references from other states?

Answer: Yes.