

Date: March 15, 2017
 TO: All Bidders
 RE: **PEOPLESOFT APPLICATION UPGRADE CONSULTANCY**
 Our File Number: **2017-RFP-10**

ADDENDUM # 2

Please see below clarification to this RFP documents issued on February 22nd, 2017. This addendum forms part of the contract documents and is to be read, interpreted, and coordinated with all other parts. The cost of all contained herein is to be included in the contract sum. The following revisions supersede the information contained in the original clarifications/specifications issued for the above-named project to the extent referenced and shall become part thereof.

Acknowledge receipt of this Addendum by inserting its number and date on the RFP Form. Failure to do so may subject the bidder to disqualification.

Clarification - 1

#	Referring to	Question/Clarification Required	REGION RESPONSE
1	Page1, Objective: "Review configuration design for piloting the fluid interface...."	Our understanding of this statement is that Niagara Region staff will configure the Fluid Interface on their own and we would only be expected to review this configuration and offer an opinion. Please confirm that our understanding is correct.	The expectation is that the successful proponent would recommend and assist with configuration of the Fluid UI for a pilot group of users.
2	The RFP states that there are 4 Niagara Region BA's that will be involved with the project.	Please provide a Skills Matrix of these BAs vis-à-vis PeopleSoft installed module list on Page 1.	Each BA is accountable as a subject matter expert and portfolio manager in each of the modules on page 1. See matrix below These resources are responsible for operational support and issue management in addition to assisting with the upgrade.
3	Interfaces and Bolt-Ons	Please provide a complete listing of all interfaces and bolt-ons	See addendum #1
4	There are conflicting statements in the RFP regarding the scope:	Please explain if the intent for this upgrade is be "like-for-like" and only include the implementation of new functionality if it eliminates a customization or is the scope incudes cherry picking and implementing those new features that would benefit for the region?	Intent is like-for-like and will only include new functionality that will eliminate customizations. The Region will entertain any recommendations for improvements if there are obvious wins based on the successful proponents experience in previous like engagements.

	<ul style="list-style-type: none"> Page 1, Objectives: Include new functionality only if it will eliminate customizations” 		<p>We would also expect the proponent to identify opportunities the Region could consider using in the future based on their understanding of our environment.</p>
	<ul style="list-style-type: none"> Page 22, Fit Gap: Recommendations for any new functionality that would benefit the Region 		
5	<p>Page 2, Objectives: “Recommend Business Process Improvement.”</p>	<p>Is this to be done in the context of the new version of the software or an overall assessment of business processes? There may be improvement opportunities that are not upgrade related. Are these included?</p> <p>We assume that the recommendations are limited only to areas where there is a potential change driven by the new version of the software and not a wholesale assessment of the all business processes. Please confirm/clarify.</p>	<p>Business process improvement recommendations will be specific to the upgrade project.</p>
6	<p>Page 21, Deliverables: “Assist with production of test scripts and plans”.</p>	<p>Please indicate how many brand-new scripts must be developed, how many current test scripts will need to be modified and clarify the meaning of “assist”. Since this is a Fixed Price RFP the only way to quantify this is with specific counts and explicit definition of the services required.</p>	<p>Because this is the first upgrade project, testing scripts will need to be developed for all modules. Successful proponents will be expected to take the lead on the development of the scripts and testing plans with the support of the project team. These scripts will be utilized for future upgrade project.</p>
7	<p>Page 21, Deliverables: “Fully document and functionally test application upgrade up to and including current application version”.</p>	<p>Please clarify that “fully document” implies fully documenting the configuration changes resulting from the upgrade and not fully documenting all applications and business processes.</p>	<p>All documentation requirements will pertain only to the changes resulting from the upgrade.</p>
8	<p>Page 21, Deliverables: “Provide detailed functional application training <u>where required</u>....”.</p>	<p>This is too open-ended for a Fixed Price response. “Where required” could indicate either days, weeks or months of training. Please tighten the scope of this requirement so it can be correctly estimated.</p>	<p>If upgrade results in new business processes or changes in configurations, training of the project team will be required. This is expected to be ‘days’ worth of training.</p>

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 Clarification - 1**

Senior ERP Business Analyst	Portfolio
Senior BA 1	Procurement, Accounts Payable, Pcard, Inventory
Senior BA 2	General Ledger, Commitment Control, Trees, CoA Structure, nVision Reporting (report requests/scopes), Security
Senior BA 3	Project Costing, Asset Management, Workflow, HR Integration, Expenses
Senior BA 4	AR/Billing, Banking, Debt Management

- Q2)** Please confirm if the Region requires Upgrade Specialist services from the Vendor to perform the Application Upgrade?
A2) The Region requires experienced resource who can help plan and deliver the application upgrade.
- Q3)** Please confirm if the Region requires Technical Development services from the Vendor to perform retrofits to ensure that migration of technical objects are done in a timely manner for testing?
A3) No technical resources are required. They will be provided by Niagara Region.
- Q4)** Does the Region have a strategic roadmap for its Financials and Supply Chain processes? And if yes, could it be shared with us?
A4) Strategic roadmap is under development at this time, not available to share.
- Q5) &A5)** Please describe the number of end users that are using the system to assess change management and training requirements by broad roles
- o # of Buyers - **17**
 - o # of Users initiating Requisitions - **5400 Region staff have access although only a subset of this group create requisitions on a regular basis**
 - o # of Approvers - **641**
 - o # of T&E Users - **5400 Region staff have access although only a subset of this group create requisitions on a regular basis**
 - o # of Report Consumers – Only ones that have access to view or run reports using the system - **900**
 - o # of Mobile Access Users - **Currently none**
- Q6)** We have an Automated Testing Tool called AppTester built for PeopleSoft Applications and script library repository for FSCM /HCM applications that can be leveraged for during the project and future streamlining of testing. Would the Region be interested in hearing more?
A6) Yes. The Region is interested in any experience you have using PeopleSoft Testing Framework.
- Q7)** For specific activities like testing and technical development / retrofitting, we at times leverage our remote delivery centre in India to augment our regional US and Canadian teams, would such a mix of delivery techniques be acceptable to the Region or does the Region want onshore resources only?
A7) Yes, please be specific about location of all proposed resources as this will be considered in our evaluation

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- Q8)** Does the Region have the technical capacity to convert its Crystal reports to BI Publisher or other PeopleSoft supported format (e.g. Pivot grids)?
- A8)** **The Region currently does not use Crystal reports.**
- Q9)** Please clarify if the Region has implemented email collaboration and allows its approvers to approve workflow items using emails from their mobile devices?
- A9)** **Our workflow processes do leverage the email functionality to notify users that action is required but we do not allow users to approve transactions directly from the email (i.e. they must log into PeopleSoft to action). As part of this engagement, we are interested in working with successful proponents to configure fluid UI to allow a pilot group to test this functionality.**

Any and all Addenda is to be acknowledged in the spaces provided on the Form of Proposal. All other terms and conditions remain unchanged.

JAYAN

Jayan Perera, CSCMP
Purchasing Agent

c. Laura J Ford
2017-RFP-10