

Request for Proposals for Microsoft Dynamics System Implementation Services

Questions and Answers

Release Date: October 14, 2016

The following are a list of responses to questions submitted by prospective respondents (“Respondents”) to ESD’s Request for Proposals dated September 29, 2016 (“RFP”) for Microsoft Dynamics System Implementation Services. A copy of the RFP is also available at: <http://www.esd.ny.gov/CorporateInformation/RFPs.html>.

Questions listed in this document were received in writing following the release of the RFP on September 29, 2016.

If ESD deems it necessary, ESD may post additional responses to questions submitted before the deadline for proposals, which remains Friday, October 21, 2016 at 3:00 P.M. EDT.

Q. #	RFP Section	Question	ESD Response
1	III.B. Project Overview - Procurement Approach	Please confirm that project management, business analysis, and design will be provided by Redbrick, while the Implementer will handle only design, development, and testing. If this is not correct, please clarify.	Confirmed.
2	III.C. Project Overview - Project Background	How many ESD internal staff will be participating on the project? Will these staff members be experienced with Dynamics?	In their Proposals, Respondents should provide the necessary resources to complete the full Scope of Work without the assumption of any ESD developer staff participation. Nevertheless, subsequent to the onboarding and integration of any applicable ESD staff, ESD may, if appropriate, provide additional guidance as to the ways in which such staff will assume responsibility for certain aspects of the Scope of Work and/or assume responsibility for additional development work outside of the Scope of Work.
3	III.C. Project Overview - Project Background	Will the ESD internal staff contribute to requirements, design and development? If so, how many hours per week per staff member can	See prior question. Respondents should provide the necessary resources to complete the full Scope of Work without the assumption of any ESD staff participation.

		be expected?	
4	III.C. Project Overview - Project Background	Has the ESD chosen a portal product such as Microsoft Adxstudio to expose web forms to clients for data collection and self-service reporting?	No such choice has been made yet. SharePoint will be used as the document management tool.
5	III.C. Project Overview - Project Background	Is the Consolidated Funding Application (CFA) system built on the same architectural framework as the PTS? Will CFA eventually be moved to Dynamics?	The CFA system will not be "moved" into Dynamics. It will be a data source that will be used as an integration point. More specifically, the CFA data is currently downloaded to an intermediate database; this intermediate database will be the integration source for Dynamics.
6	III.C. Project Overview - Project Background	What is the size of the RedBrick team? What is the value of their services contract for this project?	RedBrick will be utilizing a 2-3 person team focusing on story development and scrum management.
7	III.C. Project Overview - Project Background	How many Access front ends are being integrated with PTS?	There is one known access front-end at this time; more may come up as new features and user Stories are evaluated.
8	III.C. Project Overview - Project Background	Please confirm that these Access databases will not be transformed to Dynamics until after the core system is built.	The order of story execution will be decided during sprint planning. The Dynamics Implementer will be involved in these planning sessions.
9	III.C. Project Overview - Project Background	How many Excel spreadsheets are being used to support sales-type activities?	N/A – the Project will not require importing Excel files for sales.
10	III.C. Project Overview - Project Background	Please confirm that these Excel files will not be added to the system until after the core system is built.	N/A – as noted in Question 9, the project will not require importing Excel files for sales.
11	III.C. Project Overview - Project Background	Is CFA an Internet-facing application?	The integration with the CFA system will be done through an already-built, intermediate database.
12	III.C. Project Overview - Project Background	What is the software stack for CFA?	N/A – The project only requires integrating with CFA data through an intermediate database which pulls data from CFA

13	III.C. Project Overview - Project Background	How is CFA integrated with PTS currently?	Via an intermediate database, which pulls data from the CFA system into PTS.
14	III.C. Project Overview - Project Background	What is the central data store?	Microsoft SQL Server
15	III.C. Project Overview - Project Background	What information, if any, can ESD share about services that it is currently receiving with respect to Customer Relationship Management System Implementation or related services?	<p>As described in the RFP, ESD has selected RedBrick Technologies, LLC, as its Dynamics Adviser. ESD has also provided the scope of services anticipated to be performed by RedBrick in the role of ESD’s Dynamics Adviser as Appendix B. ESD has no more information to provide at this time with respect to its Dynamics Adviser.</p> <p>Historically, ESD has not contracted for agency-wide CRM system implementation services in the manner contemplated in the solicitation. However, at present, discrete business units of the agency are using program-specific solutions. E.g., ESD’s International Division (“Global NY”) is currently using Microsoft Dynamics, which was implemented by an outside vendor.</p>
16	III.C. Project Overview - Project Background	I understand current PTS and CFA are interfacing through a central data store and new deployment of PTS will be on CRM Dynamics 2016 online. Will this integration between CRM Dynamics Online and central data store be a real-time or through nightly/weekly/monthly jobs?	Frequency of the transaction replication between the CFA is to be determined. ESD anticipates that the replication between the systems will either be real-time or nightly.
17	III.C. Project Overview - Project Background	How is current integration of external interfaces like Excelsior, Form Router, Portfolio Management, CFA and PeopleSoft with PTS system? Are they interfacing through Web Services, or	Currently, integration between external systems and PTS is through central data store(s) or manual data entry.

		direct data access through central data stores?	
18	IV.A. Scope of Work - Scope Description	Approximately how many tables and records are in the PTS database?	There are approximately 87 tables containing approximately 1,044,969 rows. Not all tables are relevant to the migration as the count includes several backup and test tables.
19	IV.A. Scope of Work - Scope Description	Can you please provide an Entity Relationship Diagram or Data Dictionary for the PTS database?	ESD is not able to provide this information at this time.
20	IV.A. Scope of Work - Scope Description	How many reports are required for the new system?	The number of required reports is still being determined.
21	IV.A. Scope of Work - Scope Description	Are there any data sources in addition to PTS and the International Division Dynamics system that must be migrated into the new Dynamics implementation?	For migration, only the International division is planned at this time. However, for integration please refer to the RFP, section "c. project deliverables", item 3 lists the currently known integration or migration candidates.
22	IV.A. Scope of Work - Scope Description	Approximately how many records are in the International Division Dynamics database?	A magnitude of tens of thousands of records should be assumed.
23	IV.A. Scope of Work - Scope Description	Have integration requirements been determined for the integrations mentioned on p. 5? If not, who is responsible to creating interface agreements and specifications?	RedBrick will provide detailed requirements for these integrations in the form of user Stories.
24	IV.A. Scope of Work - Scope Description	Will Scribe be used for integration and orchestration as well as data migration?	Yes.
25	IV.A. Scope of Work - Scope Description	Would ESD be open to reusing Dynamics customizations provided by the CRM implementer on similar projects?	Yes.

26	IV.A. Scope of Work - Scope Description	How many stories are anticipated to be ready by the time implementation begins in January?	All Stories related to the development of PTS will be ready by January 2017. We do not have a count at this time.
27	IV.A. Scope of Work - Scope Description	Does ESD have any additional Scope of Services requirements?	No. For purposes of their Proposal, Respondents should assume only the listed Scope of Work. Nevertheless, as noted on Pages 5-6, "Ideally, the needs of several other departments and programs beyond the scope of PTS will be met by the end of this development period. The order and priority of these needs will be determined through the Agile process and fed into the Backlog. ESD anticipates that the Dynamics Implementer team will work on the development of Stories for a period of nine months, or from approximately January 2017 to September 2017. During these nine months, RedBrick will work continually to feed the Backlog with new Stories as the Dynamics Implementer works through the implementation of those Stories. In the event this schedule changes or ESD desires any additional work to be performed in connection with the Project, ESD may seek to amend and/or extend the contract with the Selected Respondent.
28	IV.B. Scope of Work - Project Resources	Is it permissible to include project resource roles that are not explicitly defined in Section B?	Yes. Respondents should propose all resources they believe would be required for them to perform the Scope of Work. Respondents may provide resource roles not explicitly assigned, but if they do so, they should include such resources as a separate, line-item cost.
29	IV.B. Scope of Work - Project Resources	The project resources listed here do not include testing resource or security resources. Will these be provided by the Dynamics Implementer or by Redbrick?	As noted in Addendum 1 to this RFP, also available at http://esd.ny.gov/CorporateInformation/RFPs.html , a testing resource is now required under the RFP. Specifically, ESD would like the Dynamics Implementer to provide a testing resource that will test user Stories before they go out for final review and approval. The Dynamics Implementer will be responsible for designing and building solutions that adhere to the stated security guidelines. ESD does not believe a security-specific resource is required. However, the vendor may propose such a resource if they feel it is necessary.

30	IV.B. Scope of Work - Project Resources	Can our resources perform part/all of the work offsite?	As noted on page 11 of the RFP, Respondents should commit to resources performing at least one week of on-site work per month, with ESD reserving the right to request more on-site time as needed. It should be assumed that all Developer resources will be able to meet this commitment as needed.
31	IV.B. Scope of Work - Project Resources	Are H1B (authorized to work) visa holders acceptable?	Respondents may propose the use of any team members who are legally authorized to work in the United States through at least December 2017.
32	IV.C. Scope of Work - Project Deliverables	Regarding implementation of interfaces: can ESD clarify which ones will require integration with external systems (PeopleSoft, etc.)?	All interfaces listed in the "Project Deliverables" section of the RFP are external systems and are required.
33	IV.C. Scope of Work - Project Deliverables	Has ESD selected a PDF Form tracker product already, or this will need to be identified and/or built into Dynamics?	Yes, ESD uses a product called "Form Router."
34	IV.D. Scope of Work - Project Approach	What is the size of the Scrum teams that are planned? Does ESD envision only 3 people per the roles on p. 6? Who will provide other roles such as user acceptance testing, documentation, and training? Will the size of the team change during different sprints?	The size of the scrum team depends on the number of people the Selected Respondent brings to the table. An omission was made in the RFP in that there is a requirement for the Dynamics Implementer to include a testing resource. This resource will be expected to test user Stories before requesting Product Owner approval. Please refer to RFP Section IV.D., under 'Product owner sign-off' for how sign-off will occur.
35	V.C. Required Proposal Information - Cost Proposal	Can you please verify the address where this contract will be executed.	Respondents should assume that, where on-site work is required, it will most often be performed at ESD's offices at 633 3rd Avenue, New York, NY 10017. A limited amount of work may also be performed at 625 Broadway, Albany, NY 12245.

36	V.C. Scope of Work - Cost Proposal	What budget, if any, has ESD allocated for the project?	ESD will identify the Selected Respondent based on a determination of best value in accordance with the RFP Selection Criteria. As such, all Respondents should provide the most competitive cost proposal possible. ESD has no more budgetary information to provide at this time.
37	VII. Submission of Proposals	Section VII requests 10 hard copies and 1 electronic copy. Does one of the hard copy proposals need to contain originally inked signatures?	Yes. Respondents should include one Proposal copy with originally inked signatures that is clearly marked as such.

Any questions regarding this document may be submitted to the designated contact account for this solicitation at DynamicsRFP@esd.ny.gov. To receive updates when new documents or addenda, if any, are posted to the ESD website, please email DynamicsRFP@esd.ny.gov.