Request for Proposals for Microsoft Dynamics System Implementation Services

Questions and Answers

Release Date: October 18, 2016

The following are a second 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. Listed questions are in addition to those posted by ESD previously on October 14, 2016, on its website at: http://www.esd.ny.gov/CorporateInformation/RFPs.html.

ESD does not anticipate providing any more responses to questions prior to the deadline for Proposals, which remains Friday, October 21, 2016 at 3:00 P.M. EDT.

Q. #	RFP Section	Question	ESD Response
38	IV.D. Scope of Work - Project Approach	Can offeror perform development of PTS from offeror's facility? And conduct and/or participate daily Scrum meetings through WebEx?	Yes, but one week on site every month is being requested. See response to Question 30 in Q&A #1, available at: http://esd.ny.gov/CorporateInformation/Data/RFPs/MSDynamics/10142016_Dynamics_QA.pdf.
39	III.C. Project Overview - Project Background	Please provide version details of current ASP.NET and SQL server application. Additionally, please provide details about number of screens and functions the current system has?	ASP.NET 4.0, SQL Server 2008R2 X64; please note that new development will be done on SQL Server 2014.
40	III.C. Project Overview - Project Background	It is mentioned that ESD currently has data for 16 years. Are you migrating 16 years of data into the new system? We would also like information on the number of database table counts and number of records in each table	There are approximately one million rows in the database spread across approximately 87 tables. Proposers should anticipate that all data of good quality will be migrated.

41	III.C. Project Overview - Project Background	Please provide the number of reports that currently exist in PTS. If possible provide count in terms of high, medium, low complexity. We also would like to know which tool is used to design the reports	We are anticipating approximately 30 base reports with the ability to do ad-hoc reporting as necessary.
42	X. Procurement Forms and Requirements	The checklist says to complete and send in form OCSD-3 with the bid but it is a quarterly form. Please clarify if this is required upon submission.	As a clarification, ESD confirms that the submission of OCSD-3 is not required within a Proposal.
43	V. Required Proposal Contents	Should cost proposal be separate from the technical or within the same document?	Cost Proposal may be submitted within the same electronic document and binder. As noted in Section VII. Submission Requirements, "Proposals should be submitted in at least 12 point type with standard margins printed on 8½ X 11 inch pages in 3-ring binders." In addition, ESD prefers that Proposals follow and note the numbered order of submission requirements listed under V. Required Proposal Contents.
44	V. Required Proposal Contents	Should the administrative forms be separate or can they be with the technical/cost proposal?	Forms may be submitted within the same electronic document and binder. As noted in Section VII. Submission Requirements, "Proposals should be submitted in at least 12 point type with standard margins printed on 8½ X 11 inch pages in 3-ring binders." In addition, ESD prefers that Proposals follow and note the numbered order of submission requirements listed under V. Required Proposal Contents.
45	III.A. Project Overview - Project Goals	Regarding facilitating greater data sharing among departments, how many departments sharing data? Is the integration Inbound and outbound? What technology has been used?	Our goal is to put these departments in the same system rather than to integrate. The list of planned integrations is stated in the RFP under "Project Deliverables." More broadly, an organizational chart for ESD can be found at: http://esd.ny.gov/AboutUs/Data/2016_Org_Chart_Final.pdf.
46	III.A. Project Overview - Project Goals	Regarding retaining information in a central warehouse - Is there a data warehouse in place or it will be created as part of this RFP?	ESD does have a central data repository in SQL Server which will be a source for reporting data when needed. A data warehouse is not in scope for this project.
47	III.C. Project Overview - Project Background	Regarding Form Router, is MS SharePoint online going to be the final repository? If yes, then is it expected to be multi-collection databases, or a single Database? How	We anticipate approximately 5,000 forms to be ingested per year. The final architectural decisions on how we will be sub-dividing our SharePoint sites have not yet been made.

		large will the databse be?	
48	IV.D. Scope of Work - Project Approach	Can you please provide more details Microsoft TFS online use?	Microsoft TFS will be used to track all of the user Stories and Tasks to be developed for those user Stories. TFS will serve as the tool for Project management, Task management and requirements management. The information in TFS will be used to facilitate the Scrum calls.
49	III.B. Project Overview - Procurement Approach	Regarding Microsoft software and licenses, does ESD already have the required software procured?	Respondents should assume that ESD will have procured the required licenses in advance of January 2017.
50	III.C. Project Overview - Project Background	How many individuals will be using this application?	Respondents should assume that ESD will have approximately 400 internal users of the Dynamics system.
51	III.C. Project Overview - Project Background	Regarding hosting, who will set up initial MS Dynamics online or who provide guidelines/ requirements about infrastructure? Are there any data recovery or backup requirements?	Redbrick will setup the Dynamics Online environment. Backup and recovery strategy is yet to be determined.
52	III.C. Project Overview - Project Background	How long is data required to be retained?	Data would need to be retained indefinitely.
53	III.C. Project Overview - Project Background	Is ESD planning on using Cloud or on premise version of Power BI?	PowerBi is only available in the cloud. Some on-premise authoring tools may be utilized.
54	III.C. Project Overview - Project Background	How will internal and external Dynamics users access the system?	Using the Internet. This solution is going to be a Dynamics CRM cloud deployment.
55	III.C. Project Overview - Project Background	Is there any consideration and/or predetermination about user access, user security and role model?	This will be a part of the Redbrick design based on conversations with all of the departments that will be deployed during the initial project. Security roles and structure is still being determined.
56	III.C. Project Overview - Project Background	Is there any expectation about single sign-on in future for all integrated systems?	No, not at this time.
57	III.C. Project Overview - Project Background	How many external interfaces will integrate with this system? And what type of those interfaces are examples: 1) Web services/Web APIs, 2) Text/File based interface.	All external interfaces (listed under "Project Deliverables" in the RFP) will be integrated via the ESD central data store using Scribe as the integration tool.

58	III.A. Project Overview - Project Goals	Statement say "Making it easier for more staff to develop and produce reports and dashboards;" Does ESD expects customization of PowerBI Professional tool to ease the development of dashboard reports?	ESD anticipates that the ad-hoc capabilities of PowerBI will make it easier for end-users to author dashboards.
59	III.C. Project Overview - Project Background	Will Dynamics Adviser "RedBrick" provide complete design themes that are compatible with new CRM Dynamics system? If this is true, does that means CRM Dynamics Organization is already created or will be created by RedBrick?	RedBrick will provide detailed requirements as user Stories. The design for answering these requirements will be done as a team with both Dynamics Implementer and RedBrick.
60	IV.A. Scope of Work - Scope Description	Scope Statement # 4 "All operational reporting requirements will be fully implemented. ESD currently has a significant number of reports that source data from PTS." What percentage of reports will be developed from scratch and how many will require migration from existing SQL Reports to this new CRM solution? The identification of reports is very critical on identifying the effort.	ESD is anticipating approximately 30 base reports with the ability to do ad-hoc reporting as necessary. We anticipate that 99% of the reports will be built from scratch.
61	IV.A. Scope of Work - Scope Description	Last paragraph on page 5, "ESD anticipates that the Dynamics Implementer team will work on the development of Stories for a period of nine months". While in Appendix B., Scope of Services for Dynamics Adviser, Phase 1b, bullet point 1 states, "Dissect each and every Feature and function of PTS and create a user Story for it. User Stories represent the list of functional items which the new system will need to support"--are these statements not conflicting? Will Dynamics Implementer responsible to implement the	The Dynamics Implementer will be responsible for creating "developing" Dynamics CRM functionality based on the user Stories that are developed by Redbrick.

		user stores developed by Dynamics Advisor or both?	
62	IV.D. Scope of Work - Project Approach	Who will be responsible for Installations and configuration of following environments: a. Development, b. Test, c. Training, d. Staging; and, e. Production?	RedBrick will be responsible for installation and configuration of these environments.
63	V. Required Proposal Contents	Under Technical Approach, related to "providing a code sample or source files that show how the technology was implemented," how can a Respondent show code samples of work completed under confidentiality agreements? This could lead to the violation of agreements signed with State of Commercial identities. The rating on provided code samples may impact the capability of the offeror.	Respondents should provide as much of a code sample as possible without violating confidentially agreements. Code snippets, which may not provide an entire picture, are acceptable, as an example.
64	X. Procurement Forms and Requirements	Can a Foreign State company registered in NY State with pending status on MWBE/DBE Interstate Application qualify for MWBE status? If yes, how much percentage?	A firm must be NYS certified to receive MWBE utilization credit. Pending applications cannot be credited.

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.