



MISSOURI

ADDENDUM NUMBER 1
DATED JUNE 23, 2017
TO
SPECIFICATIONS TO REQUEST FOR PROPOSALS #17-4011-HR-C
FOR
OFFICE 0365 PROJECT ONLINE & POWER BUSINESS INTELLIGENCE
CONSULTING & TRAINING SERVICES
DATED JUNE 9, 2017

The above entitled specifications are hereby modified as follows and except as set forth herein otherwise remain unchanged and in full force and effect.

Extension of Return Date

The due date for return of RFP responses has been extended to July 11, 2017 at 2:00 p.m. CST due to the large volume of questions we have received.

Clarification Questions

1. As a point of clarification, the numbering within the RFP document itself has been revised to reflect a consistent pattern. Section 11.3.7. previously pointed to an incorrect section. That has now been corrected and should reference section 2.a. and 2.b. A corrected RFP is included with this addendum.
2. Question: Does the University require as part of this scope of work the setup, configuration and training of the “Portfolio Prioritization and Selection” features of Project Online also known as “Strategy” capabilities of Project Online?
Answer: Yes
3. Question: Will Office 365 Active Directory authentication be the primary user authentication method for O365 Project Online and Power BI?
Answer: O365. We are implementing Azure AD Connect and will authenticate locally.
4. Question: Is there a secondary authentication method that will require setup (e.g. LDAP)?
Answer: Yes, we will at some point implement SecureAuth two-factor authentication. We'll set that up when the time comes.
5. Question: Approximately how many ongoing (inflight) and historical (closed, cancelled, inactive) Projects items will be migrated from Innotas to Office 365 Project Online?
Answer: We estimate migration of 720 projects, most of which are simple long-term maintenance projects for time tracking. We don't intend to migrate completed projects, but archive them.
6. Question: Approximately how many resources (named and generic roles) will be migrated from Innotas to Office 365 Project Online?

Answer: We have 275 licensed users in Innotas today with approximately 25 generic roles, unless we have to identify roles by each campus. Then, it would be 100. Ultimately there are four distinct resources pools: Columbia, Kansas City, St. Louis, and Rolla.

7. Question: Approximately how many Issues and Risk logs for ongoing (inflight) and historical (closed, cancelled, inactive) Project items will be migrated from Innotas to Office 365 Project Online?

Answer: We would only migrate active risks/issues. There are 93 active risks and 49 active issues as of today. Several PMs manage issues and risks outside of Innotas.

8. Question: Will Project Documents require migration to Project Online for ongoing (inflight) and historical (closed, cancelled, inactive) Project items and what is their approximate cumulative size in GBs?

Answer: No. These are stored in SharePoint project workspaces.

9. Question: Approximately how many reports currently are used in Innotas and will have to be re-created in PowerBI?

Answer: There are 700+ reports; of that number, we'll only need to reconstruct approximately 10-12%. Many are redundant.

10. Question: Please specify the number of users by role that will require training.

Answer:

- *Administrators-No more than 10, if that many. Depends on whether each campus wants to be involved in administration.*
- *Project Managers-By title, 12. There could be up to 28 other non-PMs who manage projects.*
- *Resource Managers-30+*
- *Power Business Intelligence Report/Dashboard Designers-No more than 10*
- *Power Business Intelligence Users-30+*
- *Excel Report Designers/Users-No more than 10*
- *Time Keeping, Executives-There are 171 timekeepers today. Executives-no more than 10*
- *SharePoint Administrators-3*
- *SharePoint Users-For Project Online maybe 200-300*

11. Question: Are there any external system integrations (into Project Online or out of Project Online) for data synchronization with Project Online that will be required? (e.g. Finance system, HR system, Agile Work Management system, O365 Planner, etc.)

Answer: No

12. Question: How many resources will be in the resource pool?

Answer: 274 accounts in the system. Approximately 60-70% as active resources (those capable of completing a timesheet).

13. Question: How many current projects are in the Innotas system?

Answer: 720. 513 of the projects collect time for maintenance, support, and bread-fix only.

14. Question: Approximately how many projects get created per year?

Answer: Since June 20, 2016, 156-67 standard projects and 89 maintenance projects for time tracking.

15. Question: How detailed are the projects in terms of tasks and resources?

Answer: Fewer than 5% of projects have detailed schedules. Most are built solely for time tracking. Some PMs develop schedules outside Innotas and rely on it for time tracking.

16. Question: On average, how many projects do each project manager manage?

Answer: Depends on the size, but from one up to seven.

17. Question: What type of time tracking is currently in place?
 Answer: *Innotas timesheets*
18. Question: Is there a formal project creation process (or multiple processes) that should be automated via workflow?
 Answer: *Yes, with workflow, or project managers create manually.*
19. Question: Do you intend to use the portfolio analysis tool to evaluate demand and initiatives?
 Answer: *It may not be used, but we should have it in place.*
20. Question: Will the system only be for the University of Missouri main campus? Are there users that will access the system from geographically dispersed locations?
 Answer: *Users will access the system from all four campuses.*
21. Question: How many reports are expected to be created in the new environment? Do you have example reports that you plan to replicate or create?
 Answer: *Approximately 70. Examples below.*

Title

DoIT-KPI-PM: PM Time Reporting

DoIT-KPI: Timesheet Usage in the Past Three Months

DoIT-KPI: Staff Timesheet Reporting During the Past Three Months

DoIT-KPI: Average Weekly Hours Reported Per Team for Previous Three Months

DoIT-KPI-Nikki: Administrative Time for the Last Three Months

DoIT-KPI: Avg Weekly Hours Reported Per Department for Previous Three Months

DoIT-KPI: OPN Hours for the Past 12 Months

UR: Time Reports for the Current Month

UR: Time Reports for the Previous Month

Incomplete Timesheets

Title

DoIT-KPI: Open Man./Disc. Projects (Full Health Exec Go-Live)

Discretionary DoIT Project Portfolio

DoIT-KPI-PM: Current Projects Crosstab

DoIT-KPI: Completed Mandatory and Discretionary Projects Last 90 Days

DoIT-KPI: Ninety-Day Completion Forecast by Pillar for Open Projects

DoIT-KPI: Projects Forecast to Start in 90 Days by Pillar

DoIT-KPI: Charters Due in the Next 90 Days

All Projects with Financials-20170420

Total Project Count by Type

22. Question: Is there a requirement for team members to provide status updates and/or time entry in the system?
Answer: Only time entry.
23. Question: If time entry is required, should it also include administrative and non-project time?
Answer: Yes
24. Question: Will Project Online be a part of an existing Office 365 environment? Or will any services be needed to advise or configure the tenant, SharePoint, identity, or PowerBI?
Answer: Yes
25. Question: Should additional Project Online environments be setup for dev, test, staging (or other) processes?
Answer: Yes
26. Question: A phased approach to this deployment may be necessary for any number of reasons which could include culture, change management, budget, resource availability. Can you indicate if you have any need or preference to deploy certain functionality as part of an initial phase?
Answer: The main issue is orienting Project Online users (from executives down to resources) to changes to standing operating procedures dictated by the change all functionality. You can describe this as cultural change perhaps. In any case, we need to replicate (when practical) how we do things today by SOP in Project Online. Concomitant is the need for thorough training to help make everyone comfortable with the new tool.
27. Question: Are there any strategic business goals, in addition to the Innotas contract expiration, that are anticipated to be achieved through completion of this project?
Answer: No
28. Question: Does University have an approved budget for this project? If so, can the budget be shared so vendors have an opportunity to customize a solution to maximize benefits to you while staying within the allocated budget?
Answer: Yes we have a budget but we are not making it public at this time.
29. Question: Considering your overall PPM activity currently, what is working today? What is not working?
Answer: We are still maturing as an organization. Systematic project management techniques and tools adoption is uneven across the organization.

30. Question: Does the University currently make use of Office 365 and/or SharePoint?
Answer: Implementing O365 now. Currently use SharePoint 2010 on premises; plan to migrate to SharePoint Online in the fall followed by Project Online.
31. Question: Do the University project managers currently use the MS Project desktop application?
Answer: Some do, but skill ranges from negligible to expert. Most PMs will require thorough training.
32. Question: Please describe the group(s) considered in-scope for assessing your current PPM state, pain points, gaps, etc. and for the subsequent deployment.
Answer: PMs, resource managers, and executive management.
33. Question: Please describe the PM capabilities currently being utilized on Innotas (e.g., resource allocation, schedule/task management, project schedule templates, portfolio management, reporting)
Answer: We don't use What-If analysis, nor do we use financially-related features.
34. Question: Is your Innotas deployment all out-of-the-box?
Answer: Yes, as it is a cloud service
35. Question: Please identify any capabilities not deployed on Innotas that you specifically desire to leverage on Project Online
Answer: N/A
36. Question: How long have you used Innotas and what, if any, issues are currently being experienced? Do you have any prioritized, unfulfilled, approved enhancement requests for Innotas?
Answer: Two and a half years. Reporting/dashboarding really needs a facelift. PMs perceive scheduling to be too difficult and time-consuming.
37. Question: Is your organization using Active Directory (Exchange) and, if so, do you expect to synchronize your PPM solution to Active Directory for users, resources, or both?
Answer: We will use Azure AD and are now implementing Azure AD Connect.
38. Question: Are you maintaining project artifacts (e.g., documents) that need to be migrated to project SharePoint sites in Project Online? On what platforms are those documents maintained?
Answer: Current SharePoint project sites will migrate later this year to SharePoint Online. We'll transition to O365 sites provided by Project Online as new projects are initiated.
39. Question: How many and which organizations are expected to use Project Online and Power BI? For example, IT and Facilities departments can often leverage the same environment with appropriate configuration considerations.
Answer: Just IT departments on each campus.
40. Question: How many different project types do you anticipate needing setup as new project templates?
Answer: DoIT generic, application development, maintenance/operations projects.
41. Question: Do you need to capture time worked on tasks through either manual timesheeting or integration with a timekeeping system?
Answer: We capture time in Innotas timesheets and intend to do the same in Project Online.
42. Question: How many projects are currently in Innotas or being managed standalone and have you determined how many current or archived project schedules are to be migrated?
Answer: We won't migrate closed projects to Project Online. We'll store them elsewhere. We have 720 active projects across the university system. Of that, 513 are for maintenance, support, and break-fix only; mainly to capture support time.

43. Question: Do you need to deploy any environments (i.e., Development, Test, Training) in addition to your Production environment?
 Answer: *Yes*
44. Question: Do you anticipate managing the prioritization of proposed projects against resource constraints (as opposed to just managing approved projects) in the deployed platform?
 Answer: *Ideally, yes. Requires cultural change.*
45. Question: Will interface of time tracking information or use of timesheets, whether currently in use or otherwise (including for administrative time) need to be built as part of the project scope or will this be considered a separate phase, if needed, and have these data flows been diagrammed and defined?
 Answer: *We intend to use Project Online timesheets. We would like a workflow to enable the PM to check resource data entry for accuracy; once complete the timesheet would be finalized.*
46. Question: Do you anticipate automating any specific existing processes through workflow as part of this project scope or will this be considered a separate phase, if needed? If included, can you provide flowcharts?
 Answer: *Requests for new projects/business cases.*
47. Question: Do you need to integrate Project Online data with other line of business systems other than by using an external business intelligence or reporting platform such as Power BI? If yes, please provide some requirements that would equip us to estimate the complexity of discovery, planning, and deploying an integration solution.
 Answer: *No*
48. Question: We author our own courseware. Do you require electronic copies of courseware or will hardcopies be acceptable?
 Answer: *Either is fine.*
49. Question: We are a registered education provider of PMI. Do you require PDUs for your training participants?
 Answer: *Would be nice.*
50. Question: Do you have minimum requirements for a post-implementation support plan?
 Answer: *We develop that ourselves.*
51. Question: What features of Innotas need to be migrated? Identify the feature name, number items in feature and how data can be extracted (By SQL query? CSV Export? By REST Query?) Identify all objects needing migration.
 Answer: *See below*

Migration Object (add missing features)	Number (number of items in feature)	(D)irect from application, (C)SV, (S)QL, (R)EST Query, (P)roject
Custom Project Fields		Manually entered during configuration
Custom Resource Fields		Manually entered during configuration
Calendars		Manually entered during configuration
Projects	200	You tell us how best to do it from Innotas
Resources		You tell us how best to do it from Innotas
Custom Reports		
Issues		

Risks		
Documents		
Timesheets		
Project LifeCycle workflows	1	Manually entered during configuration
Innotas Reports	70 estimated	Manually built
Project Prioritization		
Project Request Management	1	Manually built workflow
Financial Management		
Application Portfolio Management	7 Initially	Manually built during configuration; need help on creating a hierarchy

52. Question: For each report to be migrated, please provide a screenshot.

Answer: There are too many to do this. We intend to write them ourselves.

53. Question: For each lifecycle workflow, do provide the process chart for each.

Answer: See Exhibit A, Project Request Management, attached

54. Question: List any applications you need to import data to Project Online for periodic reports (exclude innotas)

Answer: None

55. Question: Identify any features in Innotas that are not OOTB in Project Online that are needed..

Answer: Hierarchical (roll-up) portfolios and fine-grained resource contouring.

56. Question: What features of Project Online are expected to be used?

Answer:

- *Resource Center-Yes*
- *Project Center- Yes*
- *Project Lifecycle workflows (how many)-1*
- *Project Data Pages (PDP) – forms to collect project information–You tell us when we are configuring.*
- *Issues- Yes*
- *Risks- Yes*
- *Project Sites-Yes, phased in from standard SharePoint*
- *Portfolio Analysis- Maybe. Requires a more mature project organization.*
- *Timesheets- Yes*

57. Question: Will any of the following features be needed? These are not native to OOTB Project Online but available as vendor apps.

Answer:

- *Budget Cost Management- No*
- *Funding Management- No*
- *Contract Management-No*
- *Asset Management- Maybe. There is great interest in this feature.*
- *Project Request Mgt - Yes, but this should be available in a workflow in Project Online*
- *Cost Benefit Analysis-No*
- *Benefit Realization Management-No*

58. Question: What are the project types (IT, Software, Construction, NPD, Maintenance, BPI, Marketing, etc?)

Answer: IT and software development

59. Question: Some report like Status reports or Project Charters cannot be built effectively in Power BI. For these reports SQL Reporting Services is better report engines to render these in. Is it desirable as an option to be able to present SQL Reporting Server reports in Project Online?

Answer: We need to learn more about this. Project Charters will be created in a separate SharePoint site as word documents.

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Exhibit A
Project Request Management

