

State of Louisiana
Department of Revenue

Development/implementation of LDR's
First Data Mart

RFP 44000011104

Official Responses to Written Inquiries

1 – What is the budget?

Response: *The Louisiana Department of Revenue (LDR) has included \$445,000 in its FY10-11 budget request for the Enterprise Data Warehouse project. This is an estimate based on information that was available at budget request preparation time. Cost Proposals should be prepared based on the Proposer's estimate of the level of effort required for development and implementation of the data mart and not based on the requested budget amount.*

2 – Who performed the analysis for Phase I?

Response: *The analysis was performed by Estrada Consulting, Inc.*

3 – Are they eligible to bid for Phase II?

Response: Yes.

4 – Will the winner of this phase be eligible for Phases III and IV?

Response: Yes.

5 – Will the Agency put out a bid for Phase III and IV or simply extend the contract with the successful vendor from Phase II or is this to be determined?

Response: *If a contractor is to be selected to assist with Phases III and IV, it will be via the RFP process. The Phase II contract cannot be extended for future phases as the scope will be different.*

6 – Can you make available the final report/analysis documentation from Phase I?

Response: *Analysis documentation was not a required deliverable of Phase I. The logical models will provide the analysis data which was gathered.*

7 – What level of effort was estimated to complete Phase II in the Phase I analysis?

Response: *The level of effort wasn't estimated in Phase I. The number of tables, etc. are contained within the models.*

8 – Reference Attachment 1, Statement of Work, Section 2.0 Description of Services/Tasks

"The contractor shall not be required to provide to the State any hardware or commercial software as part of his contract responsibilities."

a) Since the contractor is not required to provide hardware, please describe the specific hardware and software that the State intends to use for Phase II implementation.

b) Is it the State's intention to continue to use the same platform described for Phase II implementation for Phase III and Phase IV of the project or will the State use separate platforms for Phase III and Phase IV? Will the data marts reside on one platform or on multiple platforms resulting in a stove piped environment?

Response:

a) **Hardware**

LDR utilizes a Windows-based platform. For this project the minimum specifications for the server(s) will be as follows:

*Microsoft Windows 2003 Server or Microsoft Windows 2008 Server
Dual Xeon Processor 2.8 GHz, 1333 MHz
16 GB RAM
4 – 36 GB 15 K RPM Serial Attached Hard Drive*

Attached to an EMC CX-480 SAN

**If supported, we may employ a combination of Physical and Virtual Servers. We use VMWare 4.x. LDR will work with the selected vendor prior to kick-off to solidify the needs for the project.*

Software

All software to be utilized is outlined in the RFP (see Attachment II).

b) The same platform will be used for all phases of the project

9 - What is the budget for this solicitation?

Response: *See the response to question #1 above.*

10 – On page 28, Section 5.0 It is stated that the negotiated contract will be a firm fixed price with progress payments upon completion of identified payment tasks. However, appendix E has spaces for hourly rate and estimated hours which is usually associated with a Time and Materials contract.

We can provide either a Time and Materials estimate with hours / rates; or a deliverable based estimate with payments by deliverable (but no hourly rate information). Which does the state want?

Response: *The state wants a firm fixed price deliverables based contract with payments by deliverable. The hourly rate data and the estimated number of hours that the vendor proposes for particular tasks gives us the ability to evaluate their ability to get the task done within a reasonable amount of time and also allows us to accurately plan the project. The matrix within Appendix E of the RFP is to be submitted by vendors in their proposals.*

11 - On page 32, Attachment I Section 2.0 It is stated that there will be an estimated 10 Report Studio / Query Studio reports developed. As part of this project:

- a) Is there a plan for any Analysis Studio cubes?
- b) Is there a need for the Framework Manager model to be developed to support OLAP development?
- c) Is there a need for the Framework Manager model to be developed to support DMR (Dimensional Modeled Relational) reporting?
- d) Is there a plan for dashboards or portal pages in support of the reports?
- e) Is there a plan for end-user report development and a need for Framework Manager packages to support end-user reporting?
- f) Will the reports developed be presented in HTML, PDF or other?
- g) Will the reports developed utilize cascading prompts?
- h) Is there a plan to use the Go Office components of Cognos 8.3?
- i) Will the requirements gathering and design of the reports be the responsibility of the vendor or the State?

Response: *All reporting development is estimated.*

- a) *There are no plans for Analysis Studio cubes at this time. However, the State does have Analysis Studio licenses should the need arise.*
- b) *It is not anticipated that the FM model will need to support OLAP development, but that will be based on the users' needs.*
- c) *It is likely that the model will need to include dimensional modeling for reporting. Again, this will be determined based on users' needs. Extensive report requirements have not been defined.*
- d) *Any dashboards/portal pages should not go beyond a simple page in Cognos Connection with multiple portlets.*
- e) *Yes, all models/packages should be geared towards end-user reporting. While IT may create the majority of reports over time, the model should be designed as 'user friendly' to allow our more advanced users the ability to create their own reports.*

- f) *The reports will be developed in Report Studio or Query Studio. The report can then be presented in any number of ways (HTML, PDF, etc.), but this determination is always made by the user via run options.*
- g) *Cascading prompts are certainly possible.*
- h) *Go Office components will not be utilized by the vendor for this project.*
- i) *The requirements gathering and design of the reports will be the responsibility of the vendor.*

12 - On page 32, Attachment I Section 2.0 A key component of estimating the level of effort for any data mart development is the number of expected fact and dimension tables. Can you give us an estimate of the number of expected dimensions and facts? Also can you provide a list of expected dimensions and facts?

Response: *The estimated dimension and fact tables are included in the logical models.*

13 - On page 34, Attachment I Section 5.0 Will the LDR make available current database layouts of the data to be loaded into the datamart prior to awarding the RFP?

Response: *There are no database layouts of the production data. Overviews of the general subject areas can be provided, but a specific ERD does not exist.*

14 - On page 34, Attachment I Section 5.0 How long does it take to currently “refresh” the SQL 2005 database that the LDR currently uses.

Response: *For purposes of this response, it is important to realize that the reporting database, from which data extraction will occur, is a mirror image of the production database used for transaction processing. Refresh of the reporting database occurs in one of two ways. They are:*

- a. *On Sunday afternoon and on Wednesday evening, a full backup copy of the production database is taken. The reporting database is “refreshed” by performing a restore of the reporting database using the full backup created from the production database. The “refresh” portion of this process takes on average four hours to complete.*
- b. *On Monday, Tuesday, Thursday, and Friday evenings a differential backup of the production database is taken. The reporting database is “refreshed” by applying the differential backup just taken of the production database to the reporting database. The “refresh” portion of this process takes on average 45 minutes to complete.*

15 - On page 34, Attachment I Section 5.0 Can LDR provide documentation on how the current refresh of the SQL 2005 database works? Diagrams, flowcharts, etc.

Response: *See the response to question #14 above.*

16 – Will LDR consider releasing answers to written inquiries prior to the May 24 date?

Response: *If all answers are completed prior to the May 24th date, they will be released at that time.*

17 – On page 1, Section 1.1.1 It is noted that Phase II is the focus of this RFP. Is it possible to review the results of Phase I - Requirements gathering, development of enterprise logical data model and design of first data mart logical model?

Response: *Deliverables from Phase I are available for review. A request should be made through the RFP coordinator.*

18 – On page 1, Section 1.1.1 Assuming Phase I is complete, was this phase completed with LDR resources only or was a vendor involved in this process? If a vendor was involved who was it? If a vendor was involved are they allowed to bid on Phase II?

Response: *Estrada Consulting was the contractor for Phase I. This vendor is allowed to bid on Phase II based on the logical models that are available to all vendors.*

19 – The RFP section 1.1.1 Mentions "Configuration of the business intelligence tool to access the data mart (Cognos metadata model and initial reports) - Is it your intention that a Cognos Catalog model be created based on the developed DM(s) and if so what additional information is available on access of this system (Users, Permissions, Number - type & frequency of reports, etc).

Response: *The Cognos Framework Manager model will be created based on the developed data mart. LDR's Cognos environment utilizes Active Directory for security. Groups/roles/users are added to the Cognos namespace.*

20 – The RFP Section 1.1.1 "Design and development of the data mart population process (SSIS ETL and CDC as required" Is there an ETL Design Document from Phase 1 that can be provided to share more information on source systems and data sizing/timing?

Response: *An ETL Design Document was not part of Phase I. Completion of an ETL Design Document will be required to complete Phase II as it is within the scope of the key deliverable "Physical design documents for Phase I data mart (Sales Tax Returns)".*

21 – Is there source system information available?

Response: *No source system design information is available. General information about the FAST/Gentax product and resulting data is provided in the RFP.*

22 – What specific facts will be implemented in Phase 2 - The RFP mentions "This data mart will encompass all Sales Tax Return data". However, the document "LDR DW Phase 1 Generic Returns And Sales Return Logical Data Model FINAL[1].docx" Dated 12/3/2009, seems to have more than Just Sales Returns.

Response: *It is the intent of the first data mart to encompass specific Sales Tax Return data along with all Generic return data. For instance, all taxpayers (customers) will be loaded into the datamart, but only the Facts associated with Sales returns (example: tax due) will be included. There are detailed dimensions and facts for each type of tax return. Those detailed facts and dimensions will only include sales returns.*

23 – The "LDR DW Phase 1 Enterprise Data Warehouse High Level Logical Data Model FINAL.docx" dated 10/22/2009 Section 5 seems to have some overlap with "LDR DW Phase 1 Generic Returns And Sales Return Logical Data Model FINAL[1].docx" Dated 12/3/2009 Section 4 specifically in regards to the "Sales Tax" - Does the Document Dated 10/22/2009 Supersede the 12/3/2009 document.

Response: *One does not supersede the other except that the EDW will not be put in place until after all data marts are developed. Therefore, there is overlap in the two models.*

24 – Please describe LDR resource support for this development initiative in terms of available LDR resources - DBAs(Database Administrators), IT Resources, Available SMEs(Subject Matter Experts), and Project Committee Members.

Response: *Resource availability is provided in the RFP. LDR's resources will not be dedicated 100% to this project as other assignments will continue. Subject matter experts and IT resources will be utilized on an as needed basis, up to the percentages provided for in the RFP.*

25 – Is there an available system platform for the developed datamarts (Data and Schema) or will one have to be created as part of this project?

Response: *The platform is not yet defined. Resources are being obtained and allocated to support this project, but LDR plans to work with the chosen vendor on their preferences wherever possible.*

26 – Is there a current Cognos Implementation and environment for the user base or is a new environment needed. Please include licensing information and projections.

Response: Yes, LDR currently utilizes Cognos BI 8.3 with plans to upgrade to 8.4 prior to the contract kickoff. However, the upgrade date has not been finalized yet. LDR holds licenses for Cognos Administration, Framework Manager, Report Studio, Analysis Studio, and Query Studio.

27 – RFP Page 5, Section 1.5(C) and Page 49, Appendix G – The RFP states that the Contractor chosen will be required to sign the Non-Disclosure Agreement in Appendix G with Fast Enterprises, LCC. After legal review, this Agreement is much more than a Non-Disclosure it's a Non-Compete Agreement. Section 6 of the Appendix G Agreement requires the Contractor chosen to agree “**not to create, enhance or build a product that competes with the Fast software products.**” This RFP as written therefore precludes companies that operate in the Tax and Revenue industry, offer tax processing and/or data warehouse products/solutions, and have experience designing, building and/or enhancing Business Intelligence and Reporting Data Marts as contemplated in the RFP. Is this the intent of the LDR to preclude certain qualified vendors? We request that the LDR modify the RFP in one (or more) of the following manners (in recommended priority order) in order to promote a more open competitive bid process, open up the bid process to many more experienced vendors in the Tax and Revenue space, and obtain the best value contract for the LDR:

1. Remove the need of Appendix G in its entirety by having the GenTax data exported into an “Operational Data Staging Environment” by LDR or Fast Enterprises. This allows the operational system to control the access to the operational data environment much better, allows access to ALL of the LDR data to be available and organized in simplified structures for ALL future BI needs (not just Phase 1 definition) such as taxpayer, account, transaction, return, local distribution and compliance for increased revenue initiatives. This is the industry proven preferred approach that is used for these kinds of proprietary COTS tax processing systems, including some GenTax implementations. This would eliminate the exposure of the GenTax data model and open up the bid to many more experienced vendors in the Tax and Revenue industry.
2. Remove Section 6 of Appendix G and put an Agreement duration (standard is 2 years) and make it an industry standard Non-Disclosure Agreement;
3. Do not require the chosen Contractor (company as a whole) to sign the Agreement but rather only the staff working on, and exposed to, the GenTax database table schema. This way the entire company is not signing the Non-Compete with FAST Enterprises, just a select few staff/resources.

Response: It is not the intent of LDR to preclude any qualified vendor. It is the intent of LDR to ensure that a selected vendor be positioned to interact appropriately with LDR’s integrated tax system called DELTA which uses the GenTax engine marketed by Fast Enterprises. It is a requirement that the Non-Disclosure Agreement with Fast Enterprises be signed by the selected Contractor.