

**Baldwin County Commission
Request for Proposal (RFP)
ERP Reporting Software for JD Edwards EnterpriseOne Software**

The Baldwin County Commission (County) desires to obtain through this Request for Proposal (RFP) a reporting software solution which integrates with Oracle's JD Edwards EnterpriseOne to help improve performance of the data collection and output as well as reduce staff time preparing reports.

The vendor will provide a reporting solution / suite which will integrate with the JD Edwards EnterpriseOne modules in use at Baldwin County. These modules include the Foundation, Financials, Payroll, Human Capital Management, Budgeting, and Capital Asset Management. The reporting solution should also have the capabilities to collect data from Modules still to be implemented at Baldwin County such as Project Governmental Cost Accounting, Expense Module and the Employee Self Service Module. The Vendor should also be able to provide training of power/end users during the implementation phase as well as future support on an "as needed basis" after implementation of the reporting solution.

The competency, experience and background of Vendors will be considered along with the quality of the proposal in making the contract award. A proposal other than the lowest priced may be selected if the County determines, at its sole and absolute discretion that its interests will best be served by doing so.

The County reserves and in its sole discretion may exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- To reject any proposals if, in the County's sole discretion, the proposal is incomplete, the proposal is not responsive to the requirements of this RFP as stated, the Vendor does not meet the qualifications set forth in the RFP, or it is otherwise in the County's best interest to do so.
- To supplement, amend, substitute or otherwise modify this RFP at any time prior to selection of one or more Vendors for negotiation and to cancel this RFP with or without issuing another RFP.
- To accept or reject any or all of the items in any proposal and award the contract(s) in whole or in part if it is deemed in the County's best interest to do so.
- To request that some or all of the Vendors modify proposals based upon the County's review and evaluation.
- To require a Vendor to give an oral presentation and/or product demonstration to the County after submittal of the RFP. Actions by the County in this regard should not be construed to imply acceptance or rejection of a proposal. The County will contact the Vendor's primary contact with further instructions should the County decide to request a presentation/demonstration.
- Baldwin County will not reimburse Vendors for any cost involved in the preparation and submission of responses to this RFP or in the preparation for and attendance at subsequent interviews.

I. Background

There is an organizational need for a reporting solution by which business end users have the ability to report out on JD Edwards EnterpriseOne data.

Since migrating to JD Edwards EnterpriseOne, a true end user reporting solution is lacking. End users were proficient in usage of FASTR, STAR and WW but currently do not have the ability to utilize Enterprise Report Writer (ERW) to create and submit reports.

II. Overall Objectives

Goal – Is to implement a true end user reporting solution which would allow business users to be able to collect and output data from JD Edwards EnterpriseOne. Business Users will be self-sufficient in report creation in order to reduce CIS staff time preparing reports for the business users.

Objectives - To effectively train Baldwin County business users, on the functionality available within the reporting tool. To standardize and streamline business practice using technologies already implemented at Baldwin County. To minimize the overall learning curve to get business users up to speed on the reporting tool and effectively leverage already implemented technologies in use.

III. Baldwin County Existing Technical Environment

These are the major components of the Baldwin County technical environment to which the new Reporting solution will be required to be compatible with:

1. Existing ERP environment
 - a. Oracle J.D. Edwards EnterpriseOne Application 9.0 & Tools 8.98.4.1
 - Plans to upgrade to tools release 9.1 within the next year.
2. Existing Microsoft Environment
 - a. Microsoft Windows Server 2008 Hyper-V Virtualization Solution
 - b. Microsoft Windows Server 2008
 - c. Microsoft IIS 6.0
 - d. Microsoft SQL Server 2008

- e. Microsoft SharePoint Server 2007
- f. Microsoft Exchange Server 2007
- g. Microsoft Windows 7, XP Professional
- h. Microsoft I.E 7.0 and later
- i. Microsoft Office 2007/2010 (including Word, Excel, Outlook, PowerPoint)

IV. Minimum Requirements

The following specifications shall be construed as minimum and should not be considered a complete list. All integral parts not specifically mentioned in the scope of these specifications that are necessary to provide a complete Reporting Solution.

All of the Overall Objectives listed in section II above shall apply to each of the areas further defined in this section. Some of them may be repeated for clarity sake, but that does not mean that they are any less important in an area where they have not been repeated. The following features and functions are required for the solution:

1. Should include a minimum of 4 developers and a combined total of 10 end-user licenses with a built in matrix to extend end-user licensing to a wider user audience.
2. The Solution should have a simple implementation footprint which will integrate with existing technologies in use in order to minimize overall learning curve as well any hardware related expenses. Recommended Implementation requirements specific to Hardware/Server/Client should be listed out in detail.
3. Reporting solution should meet organizational demand/deployment needs and should aid Baldwin County Decision makers in a timely fashion (i.e. finance approval, operational planning, and resource allocation).
4. Toolset utilization should target business end users and not technical experts.
5. The solution should provide multiple output capabilities (i.e. PDF, HTML, Excel, etc...).
6. The reporting solution should incorporate multiple distribution methods.
7. The reporting solution should emulate EnterpriseOne Data Access Controls.
8. Training sessions should be delivered in the manner deemed most efficient and cost effective by the vendor and approved by Baldwin County, to transfer knowledge to end users how to use the software and how to troubleshoot simple problems users may encounter.

9. Vendor should assist in migration of all critical reporting data from the JD Edwards World applications into the new JD Edwards EnterpriseOne solution during training sessions (i.e. Actual reports to be used for training purposes)
10. Include continuing Product Lifecycle Support with a detailed response.

V. Minimum Requirement Details

1. **License Requirements/Models-** In detail, outline multiple licensing options to include a minimum of 4 developers licenses with a total of 10 end user licenses. Since not all solutions are licensed alike, provide the best options for a total of 10 end users who will have capability to run reports with Data Selection changes and Data Sequencing changes. Of those 10 end users at least 4 licenses must have the capability and access to the full feature set functionality to develop/create and run reports. If pricing varies between static and or interactive report viewing, submit examples of both. Examples of licensing such product may be listed as:
 - a. 4 Core Report Developers and 6 Static End Users
 - b. 4 Core Report Developers and 6 Interactive (Drill Down) Users
 - c. 10 Core Report Developers & full authoring End Users
 - d. 4 Core Report Developers & 6 Change End Users (i.e. Data Selection, Sequencing, output, etc...)
2. **Existing Technology** – Baldwin County has invested in its technology and its major components. All solutions are required to be redeployed in the existing infrastructure listed in III. **Baldwin County Existing Technical Environment**
3. **Organizational Demand/Deployment** – The reporting solution should aid Baldwin County decision makers by providing the ability to allow the end users to select how much background data is required for a specific report (i.e. Supporting factual data, analytical findings, and solutions). The solution should also provide the ability to deploy reports based on internal demands such as
 - a. Will reports run on-demand or scheduled?
 - b. Will reports be batch scheduled by an administrator while end users can only view scheduled instances?
 - c. Will end users be allowed to freely schedule their own reports?
4. **Target Users** – The report development environment should target business end users and not technical subject matter experts. Report Developers should not need working knowledge of EnterpriseOne tables, business views and field names in order to create reports. Report creation should allow the end user to seamlessly develop reports based on their data access controls.

5. **Solution Output** - The reporting solution should have capabilities to output to various different types such as:
 - a. Microsoft Excel 2007/2010
 - b. Microsoft Word (RTF)
 - c. Microsoft PowerPoint 2007/2010
 - d. Adobe Reader (PDF)
 - e. HTML
 - f. Comma Separated Value (CSV)

6. **Distribution Methods** - The reporting solution should have capabilities to be able to distribute the finished report in different manners such as:
 - a. Email
 - b. Web

7. **Data Access Controls** – The preferred method for user privileges would be to “piggy-back” off of the existing EnterpriseOne core system standards and should seamlessly merge Data Dictionary Values, User Defined Values, EnterpriseOne Tables and EnterpriseOne Security methodologies within the Software. If data access controls are different, please describe in detail how product controls items listed.

8. **End User Training** – Vendor shall provide Baldwin County multiple options exploring both traditional and innovative training methodologies. Examples:
 - a. One-Site Instructor Lead / SME
 - b. E-Learning / Simulations
 - c. Video-On-Demand
 - d. On-going / AS needed

9. **Migrating JD Edwards World Reports** – Vendor will aid Baldwin County End Users in duplicating business critical reports which were in use while on JD Edwards World. Conversion of these reports can be included as training examples and or include any conversion utilities in place which would allow for quick conversion of the FASTR / STAR row definitions or WW Queries. These reports would include:
 - a. FASTR
 - b. WW
 - c. STAR

10. **Product lifecycle** - Details should include Product Enhancement Lifecycle and how Product updates/fixes are pushed out to Customers. Also provide details of its relationship with Oracle as it relates to future Tools/Application releases. Also include product support / training for updated release of reporting product.

VI. Company Background – Each company responding to this RFP must include the following information about their company:

- a. Describe the company’s experience in providing the solution that is being requested in this RFP.
- b. Provide a brief description of the company including past history, present status, future plans, etc.
- c. Provide information about the company’s size, organization, and locations.
- d. Provide at least three references for existing customers using the proposed solution, preferably of similar size to Baldwin County.

VII. Pre-RFP Meeting

A **Pre-RFP Conference** will be held at the Baldwin County Purchasing

Department located at 257 Hand Avenue, Bay Minette, AL., on _____, _____.

All Interested vendors are encouraged to attend. A Voice Conference Bridge will be setup for vendors that are unable to attend the Pre-RFP-Meeting. Details regarding the voice conference bridge will be posted on the purchasing website at least 3 days in advance of the Pre-RFP-Meeting.

RFP Response Submission Deadline is:

Submit four (4) original copies of the RFPs To:

Wanda Gautney, Purchasing Officer

312 Courthouse Square, Suite 15 (mailing address)

257 Hand Avenue (physical address)

Bay Minette, AL 36507

251.580.2520

Questions should be submitted in email form no later than _____ to wgautney@co.baldwin.co.al.us and will be discussed at the Pre-RFP Meeting.

VIII. HOLD HARMLESS PROVISION

The vendor shall at all times indemnify and save harmless the County and its Departments, their officers and employees, against all liability, claim of liability, loss, cost or damage, including death, and loss of services, on account of any injury to persons or property, occurring from any cause whatsoever in the work involved in the contract, and will at his expense defend on behalf of the County and its departments, their officers and employees, either or all, any suit brought against them or any of the arising from any such cause.

IX. PRIME CONTRACTOR RESPONSIBILITIES

Vendor will assume responsibility for delivery of services and application performance, regardless whether or not the Vendor subcontracts any of these items and services. The Vendor will be the sole point of contact regarding contractual matters, including performance of services and the payment of any and all charges resulting from contract obligations. Vendor will be totally responsible for all obligations outlined under this ITB.

X. VENDOR QUALIFICATIONS

All Vendors shall be in compliance with all applicable federal, Alabama State, County and municipal laws, regulations, resolutions and ordinances, including, without limitation, all certifications, licenses, and permits, per Alabama Code (1975), as amended, Sections 10-2B-15.01, et seq. (concerning out-of-state corporations doing business within Alabama), Sections 34-8-1, et seq. (concerning general contractor licensing for businesses which construct or superintend the construction of any building, highway, sewer, grading or any improvement of structure costing \$50,000.00 or more), Sections 40-12-1, et. Seq. (concerning licenses), Sections 40-14A-1, et seq. (concerning taxation of corporations conducting business in this state), and Sections 40-23-1, et seq. (addressing sales and use tax); provided, the Vendor is not exempted from the above mentioned Code Sections elsewhere in the Code. All Vendors shall timely submit evidence or documentation establishing that they are presently licensed and permitted

under the applicable above mentioned Code Sections, suitable to, and upon request by, the Baldwin County Commission. Such evidence or documentation may be submitted with the RFP Response.

All out-of-state Vendors with an office or employee stationed in Alabama shall provide proof of certification of authority, and any required registration, to transact business in this State, obtained from the Secretary of State, all as provided for in Sections 10-2B-15.01 et seq. and 10-8A-101, et seq., Code of Alabama 1975, as amended, in order to perform work for the Baldwin County Commission. Vendors Registration Number shall be provided on the RFP Response Form. The phone number for the Secretary of State is (334) 242-5324, Corporate Division.

All vendors, contractors and grantee are required to comply with the Alabama Immigration Law under Sections 31-13-9 (a) and (b) of the Code of Alabama. Forms and documents will be included with award documents. Information and forms can be found on the Baldwin County Commission's Purchasing website under E-Verify at www.baldwincountyal.gov

Cost Summary Sheet

JD Edwards EnterpriseOne Reporting Solution

Company Name:

Date:

Capital Outlay and Implementation (Attach Detail Cost Breakdown of each category listed)	Cost
Software & Licenses – licensed for a minimum of 10 Users as defined in Section V. Item-1. (must include one year maintenance & support)	\$
Professional Services	\$
Training Services	\$
Other Costs	\$
Phase One Total Proposed Cost	\$
Recurring Annual Cost	Annual Cost
Software Maintenance & Support (for second year going forward)	\$
Other (Explain)	\$
Total Proposed Recurring Cost	\$

1. Software & License (Also include optional modules that may not be specifically requested in this RFP)
2. Professional Services
3. Training Services (Include Classroom, Onsite, & Web Based options)
4. Maintenance and Support
5. Other (Any other items that may not fit the categories above)