

AMENDMENT 2

**Request for Information (RFI)
UOG RFI No. I24-01**


Date Issued: April 18, 2024

“ENTERPRISE RESOURCE PLANNING (ERP) SYSTEM SOFTWARE”

This is to notify all prospective offerors of the following amendment set forth below:

1.1 Question and Answer Sheets 1–4 set forth as attached.

All other terms and conditions remain the same.


Vincent Dela Cruz (Apr 18, 2024 10:19 GMT+10)

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QUESTION & ANSWER SHEET NO. 1

April 17, 2024

*In response to the written "Questions" and/or 'Request for Clarifications' UOG received as of March 19, 2024 @ 4:51 am from vendor: **Workday***

Question 1: *Will you be providing us with a place to sign up for the demonstrations?*

Answer: **UOG-OIT states: A schedule will be coordinated with each vendor.**

QUESTION & ANSWER SHEET NO. 2

April 17, 2024

*In response to the written "Questions" and/or 'Request for Clarifications' UOG received as of March 20, 2024 @ 11:08 am from vendor: **Coursedog***

Question 1: Quick question - we noticed in the requirements it mentions that "student management" is one of the desired features. Would you mind elaborating on what aspects of student management UOG is looking for?

Answer: UOG-OIT states: Please note that this is a Request for Information, and the main purpose is for market research regarding higher-education ERP system to include Student management/student information. For student systems, we are looking to understand the different types of student systems. This could include but not limited to – student management, courses, course scheduling, course management, student finance, student application, student portals, academic management, syllabus management, etc.

QUESTION & ANSWER SHEET NO. 3

April 17, 2024

In response to the written "Questions" and/or 'Request for Clarifications' UOG received as of March 21, 2024 @ 3:26 am from vendor: Anthology Inc.

Question 1: What timeline is the University considering for an ERP/SIS project start?

Answer: UOG-OIT states: If funding is approved, it probably would be about one (1) year.

Question 2: What CRM is the University currently using?

Answer: UOG-OIT states: HubSpot.

Question 3: Based on the requirements, what communication management is the University expecting from within the finance system?

Answer: UOG-OIT states: The university is looking to learn and understand the different communication management available with different systems.

Question 4: Can you please provide a list of third-party solution wished/expected to integrate with the proposed solutions?

Answer: UOG-OIT states: Cayuse, PeopleAdmin, Zoho, TDClient (FA interface with federal DOE), National State Clearinghouse, Transact - (current Emarket and cashing system) and ChromeRiver.

Question 5: Our solution offers a mobile responsive interface meaning all functions will be displayed to size and proportion on any type of mobile device without requiring an application. What is your vision of mobile experience?

Answer: UOG-OIT states: The university is looking for mobile functionality that is natively built with the application. The university envisions the mobile device to be able to provide the necessary tools and portals to its users.

Question 6: Regarding CRM, how many full users (able to configure the system, update settings/workflows, write reports, use live chat, own cases) do you anticipate will access the solution?

Answer: UOG-OIT states: Please provide information that would help UOG better understand the functionality. Possibly 10-15 full users.

Question 7: Regarding CRM, how many light users (create and update contacts, run/ view pre-written reports, manage communication and events) do you anticipate will access the solution?

Answer: UOG-OIT states: We will try to provide roofing drawings. We are currently researching our database for the buildings identified on the IDIQ.

Question 8: Are you interested in implementing a live chat feature between staff and students? If so, how many live chat users from your staff do you anticipate will access the solution?

Answer: UOG-OIT states: Please provide information that would help UOG better understand the functionality of the Live Chat feature. UOG doesn't have a baseline, but possibly a guesstimate number of 20-30 Live Chat users.

Question 9: Are you interested in non-live chatbot? This chatbot performs multiple tasks, saving staff time and going well beyond simple questions and answers. This assistant answers questions and can route the conversation to a live person if needed and create follow-up help tickets.

Answer: UOG-OIT states: UOG is interested in learning about the feature and the benefits of the functionality for the university.

Question 10: How many Advancement users do you anticipate will access the solution?

Answer: UOG-OIT states: UOG does not currently use Advancement with its current solution. Please provide information that would be helpful for UOG to understand its functionality and pricing. We are not clear on what constitutes as users; but we probably anticipate about 300 users to begin.

Question 11: How many alumni contacts do you communicate with annually?

Answer: UOG-OIT states: Estimated about 10,000 alumni contacts.

Question 12: Regarding Finance/HR/Payroll, how many full access users (able to configure the system, update settings/workflows, perform accounting and finance back office tasks (AP, AR, GL, process transactions, generate financials), write reports, approve and manage budgets, and other higher level functions) do you anticipate will access the solution?

Answer: UOG-OIT states: For the Financial Aid, Human Resources and Payroll departments, there are individual designated power user granted access to configure setup parameter options which enable application features with advisement from respective IT Senior Analyst.

In addition, there is a total staff count to update records within each department: HRO – 8 staff, Payroll- 2 staff and Financial Aid – 9 staff, finance – 4 power users.

Question 13: Regarding Finance/HR/Payroll, how many limited access users (only able to view pay stubs/W-2s, view and select benefits, update personal information (address, demographic info), submit and approve timecards and expense reports, submit budget and purchasing requests) do you anticipate will access the solution?

Answer: UOG-OIT states: At a minimum, UOG expects its active users to be able to access this feature.

Question 14: Can you provide/confirm the totals for each of the following?

- a. Number of Full-Time Faculty - 184
- b. Number of Part-Time Faculty - 366
- c. Number of Departmental Administrators/Managers
- d. Number of Regular FT Employees - 367
- e. Number of Regular PT Employees
- f. Number of Student PT Employees
- g. Number of W2's (Annual)

Answer:

- a. Number of Full-Time Faculty - 175
- b. Number of Part-Time Faculty - 290
- c. Number of Departmental Administrators/Managers - 40
- d. Number of Regular FT Employees - 348
- e. Number of Regular PT Employees - 117
- f. Number of Student PT Employees – 94 College Work study
- g. Number of W2's (Annual) - 1446
- h. Number of external employees – RC-UOG, Endowment, KPRG - 276

QUESTION & ANSWER SHEET NO. 4

April 17, 2024

In response to the written "Questions" and/or 'Request for Clarifications' UOG received as of March 21, 2024 @ 1:41 pm from vendor: Data Management Resources

Question 1: Is UOG looking for software to replace its existing core ERP system, Colleague?

Answer: UOG-OIT states: The University of Guam (UOG) is looking to modernize its Enterprise Resource Planning (ERP) software system. UOG is looking for competitively priced software that meets our needs of a modern enterprise system.

Question 2: Is UOG looking to replace its other existing systems (e.g. SoftDocs, PeopleAdmin, CollegeNet)?

Answer: UOG-OIT states: The University of Guam (UOG) is looking to modernize its Enterprise Resource Planning (ERP) software system which may or may not include other existing systems. One of the purposes of this Request for Information (RFI) is to explore modern ERP solutions that are currently available to help UOG improve and resolve challenges of its current system.

Question 3: Is UOG open to keeping its existing software and augmenting the current application infrastructure with a solution that can expand functionality and enable UOG to access and/or centralize its existing data streams under a single unified platform?

Answer: UOG-OIT states: The University of Guam (UOG) is looking to modernize its Enterprise Resource Planning (ERP) software system. UOG would consider any solution (preferably Higher-education system), including the existing, if the current system can be improved to meet all the requirements and is competitively priced.

Question 4: What is the total number of users for the ERP system?

Answer: UOG-OIT states: Depending on the definition of users for the system being proposed. We anticipate users on the main system for business functions to be about 150 or more. But UOG also has students that need to access the system which is anticipated to be around 2800. Please provide information that helps UOG understand what types of users are on the system and how they are being accounted for.

Question 5: How many users should the ERP accommodate at any given time?

Answer: UOG-OIT states: Depending on the definition of users for the system being proposed. We anticipate users on the main system for business functions to be about 150 or more. But UOG also has students who need access to the system expected to be around 2800. Please provide information that helps UOG understand what types of users are on the system and how they are being accounted for.

Question 6: How many users are to be trained?

Answer: UOG-OIT states: Depending on the definition of users for the system being proposed. We anticipate users on the main system for business functions to be about 150 or more. But UOG also has students who need access to the system expected to be around 2800. Please provide information that helps UOG understand what types of users are on the system and how they are being accounted for.

Question 7: What data is expected to be migrated? From which system?

Answer: UOG-OIT states: UOG would expect as much data from the current ERP and other systems that provide the full solution.

Question 7a: Are these systems currently under support contract?

Answer: UOG-OIT states: YES, these systems are currently under contract.

Question 7b: How many data records are expected to be migrated?

Answer: UOG-OIT states: Roughly over 10 years of ERP data could be migrated.

Question 8: With regard to the Cost Estimates table in Appendix A, Both Column 2 and Column 3 are displayed as dollar values, there are no column headings.

Answer: UOG-OIT states: The column headings can be found at the way top of the document.

Question 8a: What dollar value is request in Column 2?

Answer: UOG-OIT states: Core Module, Internal Add-On, 3rd Party Add-on, Not Available pricing

Question8b: What dollar value is requested in Column 3?

Answer: UOG-OIT states: Notes / Comments / Explanation