Procurement and Contracting Services

Request for Proposals for Catalog and Curricular Approval Software

ADDENDUM #2

Please mark all proposal submission Envelopes with the following information

Sealed RFP # L192116
Electronic submission are due on July 30, 2021
no later than 2:00 PM, MST
The following questions were received prior to the close of the Technical Question period on July 19, 2021, at 12:00 PM MST:

1. For the question on Attachment A under Usability - "Describe the options for transferring historical data into your system?" – what type of historical data would you be looking to transfer?
   a. Course catalog and list of all of our academic programs, our academic policies (exist in PeopleSoft) and then other information that’s in our academic catalog as a website page (academic policies). Would want all of this information in a structured database instead of website pages. The graduate college has their catalog on a separate website, and we’d want to integrate into catalog.arizona.edu (including historical information—active courses, degree requirements, and policy language are updated each academic year).

2. Academic policies and management—can you expand on that?
   a. Approved through a process of faculty governance, as new policies are created or updated, they go through a governance process. Currently managed manually through email and governance meetings. We would like a workflow in the system where proposals can be submitted and automatically routed with standardized documentation. We would like to do more reporting on this data. Information should be displayed in a branded and consistent manner, with policies housed in a central database.

3. Can you expand on the Handbooks?
   a. We are hoping to have a central content repository/workflow. Departments can opt in to have their handbooks in a central place and be able to update. Also, the ability to pull up up-to-date policy information. Leverage and track workflow and versioning.

4. Questions are similar on the excel and the pdf. You want us to answer everything right?
   a. Yes.

5. Question about API usage on Peoplesoft--is there already experience doing API's with Peoplesoft?
   a. Yes, we have been a Peoplesoft school since around 2008. We have a team of developers and business analysts. We have customizations and modifications that we would work through to make sure this is successful. We want to move our entire course catalog. There are approximately 36,500 records in the Course Catalog that would need to be migrated; this includes both active and inactive courses.

6. Can you describe the weight of the evaluation criteria?
a. We will not release the weighting, but the criteria are in the descending order of importance.

7. Can you please elaborate on what you mean by "Describe how the workflow interface maintains consistency (regardless of the request type)." What do you mean by that?
   a. We have requests to create new policies or courses (currently a manual process), and we want this standardized in one solution. This includes requests to create new academic programs and plans and the experience should be consistent regardless of if it is for a plan or course—the user experience should be standard (fewer different ways of navigating and understanding forms).

8. Will there be an onsite Demo?
   a. We have not determined if the demo will be via Zoom or Onsite.

9. Section 5.1 advisement reports, are there examples you can share?
   a. The page at https://uaccess.schedule.arizona.edu/psp/pubsaprd/UA_ADV_CATALOG/HRMS/h/?tab=DEFAULT is designed to automatically use a dummy login to seamlessly present public users with a list of advisement reports without needing to log in to PeopleSoft. It is possible that the public login was temporarily down, preventing access to the page. This page should be working as expected now; if presented with a login screen, clear browsing history and reattempt.

10. I assume you would want catalogs separated by schools, can you expand on that?
   a. We have the general academic catalog that includes all university level requirements for graduate/undergraduate from a policy perspective. It also includes curriculum for undergraduate programs but there is a separate catalog for graduate programs. Professional schools also have curriculum information on their separate websites and we’d like a standard format and consolidation for the state approving agency and the user experience.

11. You want one place where everything lives but you want to spin up separate sites?
   a. We can foresee use cases where one or more colleges wish to present catalog information on the individual college’s website, where they could leverage catalog data for their site using an API.

12. How important is the ability to update/maintain forms and workflows without vendor intervention?
   a. Super important. We are a very large and complex university and very nimble and we need technology to support change.
13. Do you know how many forms you have that you would want to incorporate into workflow functionality?
   a. See the link in the RFP to the curricular affairs site where you can see the different types of requests that are being managed outside of central systems. We also have program and course approvals. On the undergraduate side there are about 17 different types of proposals and 19 on the graduate side with only a few available through a workflow (we have different workflows). We would want to move workflow out of PeopleSoft and create new workflows where the process is currently paper/email.

14. Are there any specific requirements around customer support?
   a. This is less about hard requirements and more about explaining your companies’ approach to support. 24/7/365 or are there specific windows when support is available? What about Site Down issues at 3am on Saturday, do you offer a different communication channel for off hours system down issues? Do you have an SLA? If yes then please include. What are your escalation processes when your Tier 1 representative is having a bad day and we need something escalated? Do you offer any additional support or training as an additional paid service?

15. 5.2.1.4 Ability for user to customize. Can you please clarify what is meant by this?
   a. Ability to view filtered catalog content based on user-defined criteria. For example- a user indicating they are an undergraduate student would only see courses, policies, and degree information that apply to the undergraduate career.

16. 5.1 Specifications. Will the Advisement report sheets need to be migrated? If so, do you have a sense of how many that would be?
   a. Advisement report sheets are generated in PeopleSoft; approximately 600 distinct documents are generated and displayed. We would prefer a more user-friendly way of displaying degree requirements to students in the new solution.

17. Customizable and flexible approval workflow structure to replace workflows currently housed in PeopleSoft, as well as new approval workflows currently routed via email for creation and maintenance of Academic Policies, Schedule of Classes-level enrollment requirement logic, departmental prefix and degree requirements. (5.2.2)
   a. Apart from the submitter, approver, and administrator roles currently defined, will additional roles need to be defined/modified to provide access to these workflows?
      i. The Course Add workflow requires a review period during which users from all departments may review and comment on the course
details without the option to approve or deny; depending on implementation this may utilize the existing approver role or may require an additional reviewer role. The ability to create additional roles as needed is preferred.

b. We propose developing a solution using existing CMS systems like Drupal with additional customizations to meet the specific requirements listed in the RFP. Would you be open to a custom-developed solution instead of an out-of-the-box /off-the-shelf enterprise solution?

i. This might be best explained through an example. Our current new program approval process includes more than 15 steps with approvals having to be done sequentially and some that can be done simultaneously. We are open to changing our business processes if your solution in this space meets our minimum needs, but there is a chance that we would want to customize your workflow. We would want the ability to have content written once and displayed in several places, similar to a content management system like Drupal. (Arizona has a lot of Drupal experience across the university.) What kinds of customizations are possible through configuration of your system and what kinds of customizations are possible through APIs that move data out and back into your system? Are there additional expenses for APIs, consulting on them, and in the end we may wish to simply pay you to do the customization for us that would ultimately live on our servers and we would provide long term support for. In this case what are the development costs around these types of solutions? ( Likely an hourly rate and maybe a brief explanation of an example you did with another client.) We are not expecting every vendor to say yes to every question, if your system doesn’t have this level of extensibility then please just say so.

18. Ability for select functional users to configure automatic route structures and field names without developer assistance. (5.2.2.5). Can you provide some more clarity on this point?

a. The institution seeks a solution that allows a limited number of central administrative users to make adjustments to standard route rules, add/remove fields or adjust field names on workflow forms without requiring assistance from vendor-supplied or in-house developers.

19. Ability to create and manage interdependencies between workflows (ie, a request to create a new academic plan may automatically generate one or more requests to create new courses) (5.2.2.6). Can you provide some more clarity on this point?

a. Academic departments proposing a new undergraduate degree program may need to propose the creation of one or more new undergraduate courses, either as degree requirements or electives. The ability to link
these two types of proposal forms in multiple ways would increase functionality for end users:

i. ability to select both existing courses and add new courses as part of the new curriculum on the program proposal form;

ii. new courses added on program proposal form would automatically prompt the initiation of a course add request;

iii. while the individual courses and programs would route independently, users could follow links from the program proposal to the associated course proposals;

iv. notification messages for new programs and new courses would include links to any associated proposals.

20. Automated reminder messages: ability for users to opt out of reminders or select frequency and format of reminders. (5.2.2.7). Can you provide some more clarity on this point?

   a. Each workflow should have institution-defined default reminder frequencies (i.e., approvers for new course proposals should receive automatic email reminders every X weeks until the course has been approved or denied at their level). Individual users should have the ability to override the default frequency to receive reminders more or less frequently than the default schedule (including a complete opt-out for reminders); this override would affect the reminders sent to that specific user only, not to other users. Users should be able to set custom reminder frequencies for each workflow separately.

21. Integrations with campus technology (5.2.5). Which applications shall need to be integrated?

   a. Arizona’s SSO can be supported through Shibboleth, SAML, or Azure. You will need to be able to handle one of those, preferably Shibboleth. We are also a PeopleSoft Campus Solutions system. (We locally host PeopleSoft.) We would want to be able to create some form of filtered embed code for the Catalogue where we could limit the output to Colleges or Departments and then embed that on to public webpage or a webpage behind SSO. (Most of our web presence is Drupal, but your embed code is likely ambivalent about the web site hosting solution.)

   If you have not yet mentioned and documented your API in your submission then please do so. If you have a publicly available API then a URL is fine. We want to be able to see it and read it.

22. Integration with PeopleSoft (5.2.5.1). Can you provide additional details on the scope/extent of this integration?

   a. While PeopleSoft is an immensely customizable solution we are hoping you have a standard integration approach. Mostly like we are looking for your system to hold and manage the catalogue processes so we would need a way to push in courses from the Catalogue into the Schedule of
Classes. Please provide the features of your standard approach and any highlights of integrations you have completed at other universities.

23. Data exportable for use in external systems for reporting (curricular file sharing, data warehouse, curricular analytics, API for UA institutional and college-specific websites and apps) (5.2.5.2). Can you provide additional clarity on the reporting requirements? What are the formats required for the exportable data and which systems will be used to access the same data?
   a. We hope that your system has a wide variety of built-in reports. Additionally, would be looking to move a large amount of the data stored in your system into our data warehouse (PeopleSoft technology). This is typically accomplished with flat files on a nightly basis. Our warehouse can support a variety of file types, it is more important that you have some process in place and explain what it is as compared to us telling you all the ways we can accept your data.

   We hope to leverage your APIs to also move things like Learning Objectives into our Schedule of Classes, LMS (Brightspace), Drupal pages, and our Program Assessment tools. (Learning Objectives is an example of the kind of data that we want to write once in your system as the single version of truth and then move that data throughout several systems via an API process to avoid data decay in secondary systems.

   End of addendum, all else remains the same.