

# Request for Information (RFI) Pension Information Management System (“PIMS”)

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## Questions

1. The RFP states on page 9 that "The EDQ will be connected to an ESB that will transmit and receive all data." There is also mention of large bulk loads of data into the EDQ. Is there an option to utilize an ETL or ELT solution to facilitate the large bulk data loads rather than the ESB?
  - No, DCRB has chosen the ESB as the middle service layer.
2. Should vendor cost estimates include integrations required between MDM and the new PIMS via the service bus?
  - Yes, cost estimates should include required integration with the Enterprise Service Bus to send and receive data to and from the MDM.
3. Has an ESB been selected? If so, what is the name of the product?
  - DCRB is in the final stages of selecting and procuring an Enterprise Service Bus product. Once the process is complete, the chosen product will be made public.
4. What is the timeline for the ESB and the associated SOA implementation, and who is responsible for that? DCRB or another vendor?
  - DCRB is in the final stages of selecting and procuring an ESB, MDM, and EDQ. The estimated timeline for the associated SOA implementation work to begin is July 2015. DCRB is contracting with another vendor as part of the ESB, MDM, and EDQ procurement for the responsibility of implementing the SOA.
5. As PMIS solutions bring to bear their administrative and security features/functions, how much of that would overlap with DCRB's system architecture? Or would DCRB accept the PMIS solution as-is?
  - DCRB's intent is to implement the PIMS solution as a component application as indicated in the "DCRB Future Retirement Systems" diagram. DCRB will require that the PIMS integrate with the ESB and MDM as the authoritative source of record to the greatest extent possible. DCRB will also require that the PIMS integrate with the DCRB security architecture that will be specified in detail in a possible future RFP.

6. What is flexibility associated with MDM? Would DCRB define the data structures, table structures and column definitions, and the governance around the data architecting process or is it the PMIS vendor's responsibility to do so?
  - DCRB, along with the MDM implementation vendor, will provide the data structures, table structures and column definitions, and will govern the data architecting process for the MDM; however, DCRB is willing to modify those structures to some degree based on the needs of the PIMS vendor.
7. Is it a strong requirement to use the ESB between the PMIS application modules (for example between Enrollment and Benefit Processing)? Or just expose required functionality as a services for non-PMIS applications usage?
  - PIMS application modules implemented as an integrated solution are not required to use the ESB except as necessary to retrieve data from the MDM. For example, the PIMS application modules for Enrollment and Benefits Processing will not be required to use the ESB as long as both applications are within the PIMS solution. Non-PIMS applications implemented as separate components will be required to use the ESB to send and receive data. For example; CRM, Workflow, and/or Self-Service applications will be required to use the ESB if implemented as separate non-PIMS components.
8. What systems are in place for the Member Services Call Center? What level of integration does DCRB seek between the call center system and the new CRM?
  - DCRB currently uses Cisco Phone Systems with support services provided by iCore. DCRB intends to integrate the phone system with the new CRM to the greatest extent possible.
9. Under "Section C – Technical", it says the system should be able to "Interface(s) with external systems such as: HR/Payroll, General Ledger, Payment / Custodian systems". Can you be more specific as to the platforms that you currently use for these functions?
  - DCRB currently uses the following systems:
    - o HR/Payroll – PeopleSoft
    - o General Ledger – Dynamics GP
    - o Payment / Custodian Systems – State Street Bank
    - o Document Management System – FileNet
    - o Call Center – Cisco Systems
10. As it relates to question 11, will the system be hosted on DCRB servers?
  - DCRB is looking for vendors to propose hosted and/or non-hosted solutions including cloud and/or hybrid cloud solutions.

11. What information will be exchanged between MDM and new PIMS application?

- To the greatest extent possible, DCRB would like all data to reside in the MDM and for the PIMS application to retrieve and store data to and from the MDM through the ESB.

12. Can you please estimate the number of users in each of the following categories

- Pension Super users = DCRB estimates 4
- Self-service users = DCRB estimates around 10,000 initially
- HelpDesk users = DCRB estimates 5

13. Apart from MDM and FileNet how many other additional third-party interfaces do you envisage?

- DCRB expects all additional third-party interfaces to integrate independently and directly with the ESB to access and store data within the MDM to the greatest extent possible. Third-party interfaces may include Financial, Investments, Mobile, PIMS, and other applications when and as needed by DCRB.

14. Are you planning to migrate completely out of STAR system or there will be some functionality expected to stay in STAR?

- DCRB intends to migrate completely out of STAR, with the possible exception of maintaining benefits processing for Federal plan members as referred to in Question 6.

15. Section C, Technical; Bullet 8, Page 10

What does "Full control of all fields that have built in context restrictions and drop down menu selections" mean? Please elaborate.

- DCRB would like the ability to modify context fields and field values or drop down menu values within the PIMS solution without having to rely on the PIMS vendor. This could be done through some admin user-accessed configuration screen or UI, and it would not require application development skills.

16. Section D, DCRB Current Technology Infrastructure, Page 11

Does the current technology infrastructure include an IVR system? If so, it is envisioned that PIMS must integrate with the IVR system? Does the IVR system support integration via SOA?

- No, the current technology infrastructure does not include an IVR.

17. Appendix A, Question 5

Can DCRB please clarify that Appendix A - Question #5 should refer back to Question #4 instead of Question #3?

- Yes, Question #5 should refer back to Question #4 instead of Question #3.

18. Section D, Diagram, Page 12

In the diagram, there is a block (middle of the diagram) for “Power Center”. Is this Informatica Power Center? Is this the DCRB preferred ETL tool?

- DCRB is in the final stages of selecting and procuring a Services Platform. Once the process is complete, the chosen product will be made public.

19. Section C, Technical, Bullet 3 and 4, Page 10

Has DCRB made a selection for the Master Data Management (MDM) system, Enterprise Service Bus (ESB), and Enterprise Data Quality (EDQ) tool? If so, can you please advise your selections?

- DCRB is in the final stages of selecting and procuring a Master Database Management (MDM) system, Enterprise Service Bus (ESB), and Enterprise Data Quality (EDQ) tool. Once the process is complete, the chosen product(s) will be made public.

20. Section D, Page 11

Please clarify the definition of the “Current Technology Infrastructure”. Is this the same as the “Current Architecture”?

- Yes, the “Current Technology Infrastructure” may be described as DCRB’s “Current Architecture”. However, please note the difference between DCRB’s current architecture and the future/desired architecture that is currently being implemented as indicated and diagrammed in the same section.