



REQUEST FOR PROPOSAL (“RFP”) #5068ME

ENTERPRISE DATA LAKEHOUSE PLATFORM: SOFTWARE SELECTION AND IMPLEMENTATION

RFP Issued Date: 8/3/26

ADDENDUM #1, Questions & Answers

REVISED PROPOSAL DUE DATE/TIME: 8/31/26 BY 2:00pm ET

Questions due by: 8/10/26 by 2:00pm ET via email with the RFP #5068ME in the subject line

Proposal Due Date /Time: 8/31/26 by 2:00pm ET via email with the RFP #5068ME in the subject line

Contact:

Michael Eames

Purchasing Manager

bids@csuohio.edu

Proposals must be received by the due date/time specified above. Proposals received after the due date/time will be returned unopened to the supplier

Please refer to the attached sheets for Instructions & Information. Proposals must be submitted on the form(s) provided and signed by an authorized representative in ink in the proper spaces. Vendors are cautioned to read this entire document carefully and to prepare and submit their Proposal providing all requested information in accordance with the terms and conditions set forth herein.

Warehouse RFP Questions

Please note that the RFP timeline to respond has been extended to 31 August 2026.

Source Systems, Data Volumes, and History

1. Can CSU provide a preliminary source-system-to-domain inventory or ERD for the four primary domains?

Not at this time; while customized, it is PeopleSoft proprietary.

2. Approximately how many source tables or objects are in scope for each of the four domains?

Current source inventory is approximately:

- Student/Academics (CSPRD): 37,238 tables (~117,900 total database objects)
- Finance (FINPRD): 93,725 tables (~250,800 total database objects)
- HR/Payroll combined (HRPRD): 33,215 tables (~99,100 total database objects)

The table counts above represent the full source schemas and should not be interpreted as the number of tables that will ultimately require ingestion; our preliminary analysis indicates that a substantial majority of the source tables are empty or otherwise not relevant to historical reporting.

3. Please provide the total database size of the PeopleSoft Campus Solutions instance.

Campus Solutions (CSPRD): 37,238 tables; 28,170 views; 47,528 indexes; ~117,900 total objects.

Finance (FINPRD): 93,730 tables; 40,276 views; 111,525 indexes; ~250,800 total objects.

Payroll / HR (HRPRD): 33,279 tables; 20,867 views; 41,330 indexes; ~99,100 total objects.

4. Please provide approximate row counts for the twenty-five largest PeopleSoft tables.

Campus Solutions (CSPRD): PS_ADM_APPL_MATLS (~679M rows, 119 GB); PS_R_DESCRIPTION (~548M, 59 GB); PS_R_ORDER (~205M); PS_R_UNIT_CRSE_GPA (~196M); PS_R_COURSE_USEAGE (~165M); PS_MESSAGE_LOGPARM (~150M); PS_MESSAGE_LOG (~143M); PS_ZXC_13078_B_TMP (~129M); PS_ENRL_REQ_DETAIL (~126M); PS_R_RQRMNT_LINE (~121M). Additional large tables include enrollment messaging, transcript, student financials, accounting, and reporting-related tables ranging from ~19M to 110M rows.

Finance (FINPRD): PS_SF_ACCTG_LN (~44M); PS_HR_ACCTG_LINE (~43M); PS_JRNL_LN (~17M); PS_KK_ACTIVITY_LOG (~10M); PS_LEDGER (~10M); PS_VCHR_ACCTG_LINE (~7M). Remaining large Finance tables generally range from 1.5M to 6.5M rows and include commitment control, voucher, payment, and audit-related data.

Payroll / HR (HRPRD): PS_HR_ACCTG_LINE (~49M); PS_PAY_DED_LIAB_AP (~15M); PS_PAY_DEDUCTION (~14M); PS_PAY_DED_DIST (~10M); PS_PAY_TAX_LIAB_AP (~9M); PS_DEDUCTION_BAL (~8M); PS_SCC_INTEG_LOG (~8M); PS_PAY_SPCL_EARNS (~8M); PS_PAY_TAX (~8M). Additional payroll, earnings, tax, audit, employee profile, and leave-accrual tables contain ~1.4M to 5.5M rows.

5. How many years of history must be loaded at initial load?

This is under discussion given records retention requirements

6. How many years of history must be retained in the platform going forward?

This is under discussion given records retention requirements

7. Beyond PeopleAdmin, UKG, and Jaggaer, are additional satellite systems in the initial scope? Yes

8. If so, approximately how many satellite source systems should proposers assume in total?

Answer: Transact, PowerFaids, Slate, Starfish, some others?

9. For the named satellite systems, is API access currently provisioned?

Yes; unsure about PowerFaids.

10. What API tier or edition does CSU hold for each satellite system?

Slate – Web/SQL; Transact – SOAP/REST; PowerFaids – Unknown; Starfish – Web/Amazon.

11. Do existing extracts or flat-file feeds from these systems exist that could be reused?

Yes, all of them.

12. What is the PeopleSoft hosting model — on-premises, hosted, or cloud?

On-premises.

13. What database platform and version underlies PeopleSoft Campus Solutions?

Oracle Database 19c Enterprise Edition.

14. Will CSU permit log-based change data capture against PeopleSoft, or is read-replica access the only option?

Read-replica access only. Note: PeopleSoft HCM/Finance are being decommissioned as part of the Workday implementation, so a one-time snapshot is all that is required for those applications.

15. Does CSU have an existing gateway or network connectivity footprint (ExpressRoute, VPN, on-premises data gateway) available to this project?

Answer: VPN.

16. Can CSU confirm historical data volume broken out by source system (PeopleSoft Campus Solutions/Student, PeopleAdmin, UKG, Jaggaer)? Not at this time

17. Can CSU provide an estimated table/object count (or range) per source system to anchor the tiered pricing structure requested? Not at this time; please provide a tiered response.

18. Will operational feeds be needed from PeopleSoft FIN and HCM based on the July 2027 Workday implementation timeline, and is retention of historical PeopleSoft FIN and HCM data in the data warehouse required? No; operational reports will be tested in parallel in Workday and legacy PS with only institutional reporting using the warehouse

19. Is CSU open to receiving tiered pricing by data size (e.g., GBs of data) rather than by source system and/or table count? Yes

Workday and ERP Transition

20. What is the confirmed Workday Financials/HCM production go-live date?

Answer: July 1, 2027.

21. What is the current status and phase of the Workday Financials/HCM implementation?

Answer: Unit testing.

22. Who is CSU's Workday implementation partner?

Answer: Alchemy.

23. What coordination model does CSU envision between the Workday implementation partner and the data platform vendor? The data platform vendor will work through CSU's Office of Data Analytics and Institutional Research (DAIR)

24. Who is responsible for building and maintaining the RaaS reports used for extraction — CSU, the Workday implementation partner, or the selected vendor? CSU

25. Will CSU provision an integration system user with the security domains required for extraction?

Answer: Yes.

26. Who owns Workday security configuration for extraction — CSU or the selected vendor?

Answer: CSU.

27. When will a Workday tenant be available for extraction development?

Answer: HR currently available; the rest will come at a later date.

28. Does CSU license Workday Prism Analytics, and if so, at what release or edition?

Answer: Yes; release/edition not yet confirmed.

29. Is using Prism as a staging layer an acceptable extraction pattern?

Answer: Yes.

30. During the multi-ERP period, does CSU expect PeopleSoft and Workday data conformed into a single curated model with unified dimensions, or maintained as source-aligned subject areas joined through key crosswalks?

Answer: Crosswalks.

31. Can CSU clarify whether Workday Financials/HCM go-live dates are fixed, and whether phased cutover means the platform must ingest from both PeopleSoft and Workday concurrently for a defined overlap period, or if it is a hard cutover per domain?

Answer: Concurrent/overlap; not a hard cutover at go-live.

32. If the Workday Financials/HCM go-live slips, will CSU accept schedule relief tied to source-system availability? Yes

Initial Scope, Reporting, and Data Models

33. How many priority report families are anticipated in the initial production scope?
To be determined based on pricing and staffing.

34. Can CSU provide a candidate list of those report families? See above.

35. Will CSU establish a cap on report families for fixed-fee pricing purposes? To be determined.

36. How many Power BI reports and dashboards exist in the current estate?

Answer: Approximately 30.

37. How many Power BI semantic models exist in the current estate?

Answer: Approximately 30.

38. How many of these are in scope for migration, versus rebuild, versus retirement?

Answer: All will need to be migrated or rebuilt.

39. Where does CSU draw the delivery boundary between vendor-built semantic models and CSU-built reports and visuals?

Answer: DAIR will own reports and visuals, likely semantic models as well.

40. Is the selected vendor responsible for building the IPEDS and Ohio HEI submission extracts, or only the certified data layer beneath them?

Answer: Layer beneath.

41. If the vendor builds those extracts, is validation against prior-year filings included?

Answer: N/A.

42. Do current data dictionaries, business rule documentation, or a canonical definitions catalog exist, and if not, should proposers include data definition workshops in scope?

Answer: This is a work in progress.

43. Can CSU confirm whether new Power BI dashboards are required, or only migration of existing dashboards? If new dashboards are required, is there an estimated number?

Answer: Migration only unless it is not possible; then rebuild.

44. For the "fewer than 50 report builders and several hundred report consumers" assumption, can CSU provide a firmer consumer count?

Answer: It is likely much less; approximately 10 people or so.

45. Is there a target or expected range for the number of curated subject areas beyond the four primary domains (HCM, Finance, Academics, Identity) over the five-year term? Can CSU provide examples (tables, columns) for existing subject areas to help price additional subject areas? Unknown at this time

46. Can the current curated subject areas be leveraged as the data model for the go-forward data warehouse, or do requirements need to be gathered and redesigned? Current subject areas can and should be leveraged

47. Where does business logic for reporting live today? De-centralized.

48. Can CSU quantify the size of the existing Power BI solution, including number of semantic models, reports, and dashboards?

Answer: Approximately 30 dashboards and semantic models.

49. Is Power BI migration within the vendor's scope or CSU analyst scope, and are existing models expected to be repointed or rebuilt?

Answer: CSU analyst scope, not the vendor.

50. Is building and validating IPEDS and Ohio HEI submissions in scope, and what produces them today?

Answer: No; DAIR will continue to produce these submissions.

Acceptance, Testing, and Reconciliation

51. What are CSU's acceptance criteria for each implementation milestone? Unknown at this time

52. What is the acceptance review window per milestone? Unknown at this time

53. What reconciliation tolerance between source systems and curated subject areas will CSU accept — exact match or a defined variance threshold? Open to discussion

54. Which system is authoritative for each domain when PeopleSoft and Workday values disagree?

Answer: Workday.

55. Who provides the known-good reports or balances used as the reconciliation baseline? DAIR

56. Where variances trace to pre-existing source data quality issues, does CSU treat remediation as a CSU responsibility rather than a vendor defect?

Answer: CSU responsibility.

57. How is the milestone schedule adjusted if acceptance is delayed by CSU resource availability? Unknown at this time but CSU resource availability, or lack thereof, will be factored into decisions

58. Does CSU have a defined defect severity model for this engagement? Unknown at this time

59. What post-go-live warranty period does CSU expect, and how does it relate to the optional 12-month co-managed stabilization period? Please provide tiered responses along with recommendations and reasoning.

60. Does CSU have an existing strategy for data sources used by development and test environments? Are development/test versions of all in-scope source systems available, or will production data be used across environments? Is CSU interested in maintaining cloned warehouse instances for development and test? Unknown at this time

CSU Staffing, Governance, and Training

- 61. How many CSU FTEs will be assigned to the project, in what roles, and at what allocation?** 1.5 FTE; We are understaffed and working on this
- 62. Will assigned staff be existing employees or net-new hires?** A combination
- 63. Will assigned staff concurrently support the Workday implementation?** Yes.
- 64. What is the current skill profile of CSU's data team relative to Spark/Python, modern ELT tooling, CI/CD, and cloud platform administration?** Low.
- 65. Does CSU's July 2027 target account for the elapsed duration a paired-delivery model requires relative to a vendor-led build?** yes
- 66. How many training sessions does CSU expect for each of the three audiences?** None; only the data team will access the warehouse.
- 67. Should training be included in the fixed fee or quoted as optional training blocks?** optional
- 68. What is CSU's project decision-making cadence?** no set timeline
- 69. Who holds authority to approve data definitions across the four domains?** The Chief Data Officer and Data Governance committee.
- 70. Is CSU's data governance council currently established, or is standing it up within this scope?** Newly established.
- 71. Who are the primary stakeholders collaborating with the vendor, and what are their roles?** Katherine Corcoran, Chief Data Officer; Anthony Mansoor, Chief Information Security Officer; Chris Muller, Senior Director, Enterprise Apps

Security, Compliance, Identity, and Personnel

- 72. Will CSU sponsor an Ohio DAS waiver for offshore delivery, or should proposers assume fully domestic delivery?** Fully domestic. Please provided pricing models for both.
- 73. What is the scope of CSU-approved background checks, and what is the typical onboarding turnaround for vendor personnel?** To be determined.
- 74. Will CSU require on-site presence for any project phase? If on-site work is required, please provide CSU's travel and expense policy.** No on-site presence required.
- 75. Is PHI in scope for any of the four primary domains?** To be determined.

76. Who performs the Splunk-side integration work for audit logging — CSU or the selected vendor? TBD. If vendor provided, CSU staff would need access to audit logs.

77. Is a security review, VPAT, or HECVAT required, and on what timeline relative to award? Yes to both. If possible, they should be part of the RFP Response.

78. For row- and column-level security and data masking, does CSU have existing role/policy definitions from PeopleSoft that should carry forward, or is this a greenfield design? Role-based security is being implemented.

79. Regarding Ohio Executive Order 2019-12D and offshore access restrictions, does this apply only to personnel with direct data access, or also to offshore development/testing environments that do not touch production CSU data? All resources should be onshore.

80. How does CSU define the “Identity” domain and what is/are the source system(s) for it? To be determined.

Platform, Architecture, Integration, and Licensing

81. For multi-track responses, does CSU expect separate implementation plans, staffing, and timelines per track, or a common services approach with platform-specific differences identified? Finance and HCM/payroll implemented first; Student does not go live until 2029

82. Does CSU have a preferred purchasing vehicle for platform licensing — direct, reseller, or Azure Marketplace? Unknown at this time

83. Should platform licensing be held by the selected vendor as a pass-through, or will CSU contract directly with the platform vendor? Unknown at this time

84. What were the configuration and findings of CSU's prior Microsoft Fabric proof of concept, and are any artifacts available for reuse? None.

85. Does CSU permit a customized architecture built on the identified platform? Unknown at this time

86. Since Microsoft Fabric/OneLake is identified as Track 1, may vendors propose a customized lakehouse architecture built on Fabric/OneLake, including custom data models, ingestion frameworks, governance, orchestration, and other components? yes

87. Does CSU have an existing ELT/ETL solution it prefers to continue using, or should the offeror recommend ELT/ETL technology? Please provide recommendations.

88. Does CSU possess a GoldenGate license? If not, will CSU permit redo-log/LogMiner access for CDC? [Not needed.](#)

Timeline, Commercial Terms, and Demonstrations

89. How does CSU intend the 180-day termination for convenience to apply to fixed-fee milestone services? [Unknown at this time](#)

90. How does the 180-day termination for convenience apply to multi-year platform consumption commitments? [Unknown at this time](#)

91. What is the target contract award and execution date? [Target of 10/1/26 for award, execution should begin immediately](#)

92. Does "operational by July 2027" mean production go-live or completion of stabilization? [Go-live.](#)

93. What factors drove the non-award of RFP #5038ME, Project C? [Internal personnel changes.](#)

94. Which datasets, and approximately how many, require intra-day refresh for pricing purposes? [No intra-day refreshes; the warehouse is intended to be a static snapshot](#)

95. Is the intra-day refresh requirement (approximately every 4 to 6 hours) expected across all four primary domains at production go-live, or can it be phased for a subset of datasets? [See above](#)

96. Do you expect this to be a product offering (COTS), or can it be a solution built specifically for CSU requirements? [Preferably a product offering](#)

97. If a custom solution is preferred, what would CSU like the vendor to showcase during the demo/presentation period? [See above](#)

98. What are the current limitations and challenges CSU is facing?

[Resourcing and lack of knowledge, not having done this before](#)

99. How many users do you have? Please provide the internal and external users who utilize this system. [Approximately 10 or fewer.](#)

100. What is the approved budget or range allocated for this project? [To be determined](#)

101. Does CSU accept digital signatures? [Yes.](#)

102. If a proposed resource becomes unavailable or is allocated to another project at award/project start, may the vendor deploy another resource with the same/similar experience and skillset? [Yes](#)

103. Given the compressed timeline, is there flexibility on the proposal due date, particularly for proposers responding under multiple tracks?

Answer: Flexible.

104. Can CSU provide more detail around expectations for the Orals demos currently scheduled for the week of 8/31? As timeline has become flexible, more information will be provided in the future

105. Attachment A indicates Attachments E, F, H, and I as required submission items. Can CSU clarify whether these attachments are required and how they should be included? These can be optional