MODIFIABLE RFP TEMPLATE & VENDOR Q&A RUBRIC | VNA-RFP-021 | Oracle Data, AI & Industry Accelerators

Request for Proposals (RFP): EPM & Hyperion Branch Management, M&A Acquisition Onboarding & Trial Balance Hub on OCI & APEX

Instructions for RFP Author: This template is structured so your IT, Architecture, and Procurement teams can issue a rigorous, apples-to-apples Request for Proposals. Customize the bracketed [Modifiable] fields below or use the companion .md file on the solution portal.

1. Issuing Organization & Procurement Schedule (Modifiable Fields)

RFP Field / Milestone	Modifiable Entry / Target Value
Issuing Organization & Sponsor	[Insert Legal Organization Name, Executive Sponsor & Primary Contact Email]
Project Scope Summary	Transition from On-Premises Hyperion HFM, Essbase, Planning, Brittle FDMEE Scripts & Acquired Subsidiary ERPs (QuickBooks / NetSuite / Legacy GLs) to Oracle EPM Cloud (FCCS / EPBCS), Autonomous DB 23ai Financial Data Hub, APEX Branch Management & Acquisition Onboarding App + AOP
RFP Issue / Q&A; / Proposal Due Dates	[Issue: YYYY-MM-DD] | [Vendor Questions Due: +14 Days] | [Proposals Due: +30 Days]
Target Contract Type	Fixed-Price Milestone Deliverables with Automated Parity & Cutover Acceptance Gates

2. Mandatory Technical Scope of Work (Modifiable Requirements)

[REQ-ARCH-01] Branch Management ('The Agile Acquisition Onboarding Data App'): Deployed in Oracle APEX 24.2 on Autonomous Database 23ai, this application acts as an immediate operational bridge for newly acquired domestic and international branches. Remote branch controllers upload non-standard trial balances and PDF bank statements (parsed via OCI Document Understanding and Generative AI), route branch disbursements through centralized remote payment authorization workflows, and feed corporate consolidation within days of deal close.

[REQ-ARCH-02] The OCI Intelligent Financial Data Hub ('Flexible Shock Absorber' Replacing FDMEE): Instead of wiring messy source ERPs directly into Hyperion or FCCS via brittle FDMEE scripts, Autonomous Database 23ai sits in the middle as a governed 'Shock Absorber.' Finance Data Engineers manage COA crosswalks, entity hierarchies, and pre-load balance validations directly in APEX before pushing clean, balanced data to Oracle EPM Cloud (FCCS / EPBCS) via EPM Integration Agent and REST APIs.

[REQ-ARCH-03] Built-In Intercompany Settlement Hub: Automates multi-entity intercompany invoicing, currency tie-outs, and elimination matching across parent and acquired branches inside the OCI Financial Data Hub, avoiding $900K+ in standalone commercial intercompany software licenses.

[REQ-ARCH-04] Auditable Financial Reporting Hub with APEX Office Print (AOP): Generates pixel-perfect multi-tab Excel, PDF, and Word financial packages where executive summary tabs are dynamically bundled with locked, read-only source detail tabs ('Answer Every Question' in a single auditable workbook).

3. Component Conversion & Acceptance Matrix

Legacy Artifact / Workload	Required Target Architecture	Engineering Method & Acceptance Gate
4-to-6 Month Post-Merger ERP Rollout for Acquired Branches	APEX Branch Management & Agile Acquisition Onboarding Data App	Onboard acquired branches in days with AI trial-balance parsing & remote payment controls

Brittle Hyperion FDMEE / ODI Jython & VBScript Load Rules	OCI 23ai Financial Data Hub ('Shock Absorber') + APEX COA Crosswalks	Self-service Finance Data Engineer mapping UI with automated debit/credit tie-out checks
On-Premises Hyperion Financial Management (HFM) & Essbase	Oracle EPM Cloud (FCCS / EPBCS) + Autonomous DB 23ai Analytic Views	Migrate consolidation rules to FCCS while offloading high-volume operational drill-downs to 23ai
Manual Intercompany Spreadsheets or $900K+ COTS Intercompany Tools	APEX Intercompany Settlement & Elimination Hub on OCI	Automated multi-branch AR/AP matching, FX translation, and elimination journal generation
Disconnected Excel Smart View Board & Audit Packages	APEX Financial Reporting Hub + APEX Office Print (AOP)	One-click multi-tab Excel/PDF books bundling summary statements with locked source ledger tabs

4. Mandatory Vendor Q&A; Questionnaire & Evaluation Benchmark Key

Bidders must answer each technical question below. Evaluation committee members can compare vendor answers directly against the Reference Benchmark Key:

Vendor Question 1: What is the Branch Management & Agile Acquisition Onboarding Data App? *[Score: ___ / 10]*

Reference Evaluation Benchmark: It is an Oracle APEX 24.2 and Autonomous Database 23ai solution designed for acquisitive enterprises that need immediate financial governance over newly acquired domestic or international branches before rolling out full corporate ERP. It handles AI-assisted trial balance and PDF bank statement ingestion, COA crosswalk mapping, remote payment authorization, and intercompany settlement in days instead of months.

Vendor Question 2: Why put an OCI Autonomous Database Financial Data Hub in front of Oracle EPM Cloud (FCCS / EPBCS)? *[Score: ___ / 10]*

Reference Evaluation Benchmark: EPM Cloud is a specialized consolidation and planning engine, not a staging lakehouse for messy multi-ERP trial balances. Staging and validating source ledgers in an OCI 23ai 'Shock Absorber' with self-service APEX mapping eliminates brittle FDMEE scripts and keeps your EPM cubes clean and fast.

Vendor Question 3: How does the Financial Reporting Hub with APEX Office Print (AOP) improve auditability over Smart View? *[Score: ___ / 10]*

Reference Evaluation Benchmark: While Smart View is great for ad-hoc analyst slicing, formal board and audit packages generated through our APEX + AOP Reporting Hub automatically bundle the formatted financial statements with locked, read-only tabs containing the exact underlying source transactions and parameter metadata, so every number is 100% self-explaining.

Vendor Question 4: How do you rationalize report/query fan-out and guarantee 100% customer code & data ownership? *[Score: ___ / 10]*

Reference Evaluation Benchmark: Vendor must demonstrate AST SQL clustering to collapse cloned queries into governed core views with runtime/AI-inference filters, and deliver 100% customer-owned SQL, PL/SQL, APEX, or cloud code with zero proprietary runtime lock-in.

5. Commercial Milestone Pricing & Evaluation Weighting (Modifiable)

Phase / Deliverable Gate	Required Acceptance Output	Bidder Fixed Fee	Eval Weight
Phase 0: AST Discovery & Blueprint	Complete code/schema AST inventory, dead-code manifest & core SQL fan-out map	$ [Insert]	20%
Phase 1: Core Schema & Logic Uplift	Target cloud/DB provisioning, automated DDL/code conversion & unit tests	$ [Insert]	30%

Phase 2: UI, Reports & UAT	Modernized UI/portals, runtime/AOP reports, security VPD/SSO & UAT sign-off	$ [Insert]	30%
Phase 3: Cutover & Hypercare	Zero-downtime cutover, row/hash reconciliation & 30-day production warranty	$ [Insert]	20%