

RFI Evaluation & Comments - System Selection Results

Date	Vendor	Finance Pros	Finance Cons
15-May	IBM / Maximo		<p>No general ledger</p> <ul style="list-style-type: none"> <input type="checkbox"/> Hoping to see more GIS integration <input type="checkbox"/> Utilities are a primary tax payer –need to identify jurisdictions <input type="checkbox"/> Not fully integrated ERP, so difficult to asses how this will work. <input type="checkbox"/> Does not integrate with PowerPlant in current version
	Comments		
16-May	ABB / Ventyx	<p>Acknowledged Finance</p> <p>They started to write a GL & stopped (based on customer input), but gained insight into a GL, with a focus now on solid integration with GL vendor</p> <p>GIS acknowledged (important for us with regard to Tax)</p> <p>Liked the Roadmap (plan as to where they are going)</p> <p>Liked accounting is invisible (operator does not make accounting decisions or use the language)</p> <p>Liked Focus on configuration not customization.</p>	<p>They have a lot of new upper management (good or bad?)</p> <p>Solid strategic vision – will that change?</p> <p>Do we want to be the beta for their new strategy?</p> <p>Not an ERP</p> <p>Not a lot of technology detail, gave us 2 words (connector, XML)</p>
	Comments		
22-May	Oracle	<p>Tax Engine (integration)</p> <p>Tree Structures (data can be rolled up in different ways)</p> <p>Multiple Ledger functionality (FERC & GAAP, also Tax and Cash reporting)</p> <p>Account derivation</p>	<p>Vision Statements (excuse) was weak</p> <p>Asset management not adequately addressed</p> <p>How to you do allocations & service functions & Trace back Dashboard are only as good as the data, timeliness, and structure</p>
	Comments	<p>Didn't see</p> <p>Accounting Management Reporting HUB</p> <p>Simulations / Activity Based / Product Costing</p> <p>The service billing & allocation cases should get to it. May need to add one case.</p> <p>Total Labor Allocation – data is not entered daily & allocations happen monthly. Real costs will not tie directly to GL data, but operations should be able to get in the ballpark.</p> <p>Use Standard Cost – What needs to tie back to finance for labor vs. what is needed to make management decisions.</p>	
23-May	SAP	<p>Small compact code block – tighter integration with accounting</p> <p>Drill back capability is evident in the presentation</p> <p>Segregation of duty flags & ability to identify and manage / control exceptions</p> <p>Approval workflow / approvals</p>	<p>Lost time in transition / clunky</p> <p>Core ERP vs. add on products</p>
	Comments	<p>Follow up: New business warehouse in memory</p> <p>For SAP a business warehouse needs to be there (a good thing)</p> <p>Tables are in German</p> <p>FERC reporting – there is no standard accepted process (follow up with references & dig deeper with vendors. Parallel ledger model? Attributes in WBS to designate the FERC account. Need to determine the best model for accounting Did not see allocations.</p>	

RFI Evaluation & Comments

Date	Vendor	HR Pros	HR Cons
15-May	IBM / Maximo	Nice to see more about Time Keeping portion Helpful to see what matters to other areas	Like to see; Field level auditing Visual workflow design – good feature Ability to add user defined fields – are the fields available in future screens Understanding future data integration capability – how do we link to this information?
	Comments		
16-May	ABB / Ventyx	Saw some analytics today Certification & Skills available to capture information	People, process & Tech (light on the people side)
	Comments		
22-May	Oracle	Checklist Organization functions Self Service (manager dashboards) – liked employee information availability Fast formula – building business rules (was interesting)	Need deeper dive on back end Self service (available in peoplesoft, but can't handle multiple simultaneous users or events) Need to *Add HR Administrator Case (set up's) 241 benefit programs
	Comments	Lots of time on talent mgmt, but need time, labor	
23-May	SAP	Audit dashboard is great – today we do hundreds by hand Ability to move a person to a new position & get the position attributes Portal for benefits enrollment, before they start work Look & feel navigation / real access to the system (as an employee) Able to see who has submitted their time Integration of scheduling & certification, work components	Like to see background check information Scheduling – spend less time on performance management Make sure EE & MGR role, but also more time on the administration & integration Incorporate HR with knowledge transfer – not sure where this fits.
	Comments		

RFI Evaluation & Comments

Date	Vendor	Customer Care Pros	Customer Care Cons
15-May	IBM / Maximo	Opportunity for the organization to coordinate work across the enterprise Customer Service should benefit from this Parallel processing in the workflow Integration with old systems – allows for varied lengths of fields. Able to test for assets – MDMA could go away.	
	Comments	Potential Use Case: Determine where are we sending our crew and materials, based on a roll up of PO's?	
16-May	ABB / Ventyx	<input type="checkbox"/> Customer Portal has information needed (similar to today) <input type="checkbox"/> Utility experience (could also be negative) <input type="checkbox"/> Our issues today are mostly due to our own customization	
	Comments		
22-May	Oracle	Dashboards (expansions) Drilling down Integration Meter data management Meter to bill process (could replace IEH – although out of scope)	
	Comments		
23-May	SAP	They said “integration” less than yesterday, and yet it seemed to be better integrated. Appointment scheduling feature was pretty slick / customers ask for small work. Up north they use outlook. This tool looks like it will work. Meters – capability to use bi-directional meters. Can lock out remotely Reading net-meters for solar Customer master data & work data integrated Data platform will never change	
	Comments	Did not see scheduling tool embedded in their system Did not see much with workflows	

RFI Evaluation & Comments

Date	Vendor	Transmission Pros	Transmission Cons
15-May	IBM / Maximo	<input type="checkbox"/> Escalation tool <input type="checkbox"/> Built in queries <input type="checkbox"/> Customization of use for user work groups <input type="checkbox"/> User group will be helpful.	<input type="checkbox"/> Flexibility requires us to define every data field & process – requires governance <input type="checkbox"/> Security levels must be set so as not to impede operations <input type="checkbox"/> Links could be broken, so must be managed and maintained.
	Comments	Like to see more <input type="checkbox"/> Integration <input type="checkbox"/> Work management <input type="checkbox"/> Dash boarding <input type="checkbox"/> Analytics - what's available <input type="checkbox"/> What do they mean by Base Data (data structures); do we have the data needed to make use of the functionality. <input type="checkbox"/> Tech -do not have logical data view, but do have physical data view. <input type="checkbox"/> Do we have access to the tech spec's to study further - we are behind the current version.	
16-May	ABB / Ventyx	Spoke Xcel Energy language – good focus on utilities Strategic & forward thinking New to ventyx – presented well / truthful (targeting activities but may not reduce PM costs) Asset Health has their algorithms & allows us to customize our own.	Skipped over Access to ABB's data (equipment information) – aggregation of that information could be beneficial to transmission. What's the future cost structure given all of the independent modules (further research release strategy & pricing)
	Comments		
22-May	Oracle	Very prepared – did their homework Show the mobile tech in the presentation Understood the system very quickly	Still don't know much about their mobile technology Lots of windows – how will that affect Large system – will need to buy a lot Need to see a lot more scheduling
	Comments		
23-May	SAP	Its all about our data – they did show good integration Mobile stuff is fantastic Integration against GIS is much more than what we've seen elsewhere Their deployments are a good thing Will force us to standardize & get our data clean	It will be a radical change
	Comments		

RFI Evaluation & Comments

Date	Vendor	Distribution Pros	Distribution Cons
15-May	IBM / Maximo	<input type="checkbox"/> Open architecture -one system of record <input type="checkbox"/> Embedded workflows -see who is doing what <input type="checkbox"/> Query & load to spreadsheet <input type="checkbox"/> Capability for attachments -hyperlinks, etc. (must maintain) <input type="checkbox"/> User group support -stand alone input capability <input type="checkbox"/> We can adjust to regulatory changes	
	Comments	<input type="checkbox"/> Like to see more info on; <input type="checkbox"/> Scheduling -how to manage crews & work (end of year events, etc.) Must be scalable for operations. How to set up a crew or structures to be scheduled. <input type="checkbox"/> Like to see more back end work completion processes. How does the info get loaded into the back end system <input type="checkbox"/> Tech -what do they do around data warehousing? Availability business objects <input type="checkbox"/> Work optimization allocation based on combining work for a location <input type="checkbox"/> Mobile <input type="checkbox"/> Automated timekeeping	
16-May	ABB / Ventyx	Auto populated data Send back to scheduling	<input type="checkbox"/> Hard to tell what is there now vs. what is in the plan <input type="checkbox"/> How do Materials tie back to other parts of the process <input type="checkbox"/> Standard Service Delivery process embedded was difficult to see
	Comments	didn't see Fleet management tool Too much info on managing equipment vs. Gas & electric.	
22-May	Oracle	User friendly intuitive Dashboard Role clarity in process flows Diverse customer based (ottertail) Customer information / enterprise wide generated ideas for additional savings (i.e. ability to go into meter maint in mass) Green button	Saw a lot of the front of the system (finance), but how does the crew see it? How do work types make their way to the asset base? - need to relook at additional scenarios - Need to see GIS integration across (backbone of our efficiency (geo spacial data integrity)
	Comments		
23-May	SAP	Instant data model We will come to see how you do business (a very welcoming remark) They have customer councils to understand their customer Integration Mobility seems more mature & more flexible than the others Fluidity ability to stage deployment - can provide value right away Liked approach to role based security - what we could see HR module from field manager's perspective, was good Heirarchy asset manger plant manger model, but also a linear approach for Gas, etc.	Going to their big data platform - will there be performance issues?
	Comments		

RFI Evaluation & Comments

Date	Vendor	Supply Chain Pros	Supply Chain Cons
15-May	IBM / Maximo	<input type="checkbox"/> Ability to bring import & export spreadsheet (this is a big deal) <input type="checkbox"/> Serialized parts tracking <input type="checkbox"/> Other stuff that people already said.	<input type="checkbox"/> Use cases - we did not see much of what we had defined. <input type="checkbox"/> Supply chain is missing a lot of the pie chart. <input type="checkbox"/> Service Management tool? Operational work system & Administrative work system <input type="checkbox"/> Demand Planning - ability to aggregate for supply needs <input type="checkbox"/> Supplier Relationship Management
	Comments	Like to see more of: <input type="checkbox"/> Mobility <input type="checkbox"/> Flow of information, project start to finish <input type="checkbox"/> Financial capabilities <input type="checkbox"/> Scheduling <input type="checkbox"/> Upstream part of processes (gathering requirements)	How to gather approvals <input type="checkbox"/> MR's <input type="checkbox"/> Staging (Eric's question) <input type="checkbox"/> Process Disciplines creates some risk <input type="checkbox"/> What happens after the Material is ordered? Doug said he was comfortable that the current UC/Scenarios were sufficient.
16-May	ABB / Ventyx	Strategy resonated Dashboard	Not looking for multiple systems (like we have today) Does not have end to end solution that appears to address our current problems Will their information be proprietary to ABB? Capability appears to be still what we have today.
	Comments		
22-May	Oracle	Demand Planning Sourcing capabilities looked good, but not much detail Liked integration / visibility / automated /connected Screens were intuitive Visibility GIS & Mobility (is so important).	Mobility - "heads down" is not mobile? Not sure what that meant. Operations Administrative support functions (time entry. Etc.). Mobility cases should cover this...team will review.
	Comments		
23-May	SAP	Fully integrated - business and field sees the same thing	E-commerce is an issue (Ariba), need cases to see this function across sourcing Spend 45 min on how to get inventory identified - need to get to strategic sourcing. Need a deep dive, but it looks like they can do it. Didn't see much workload - what is the actual functionality
	Comments	4 weeks back to back with demo's - connectivity needs to be improved. Scenarios & use cases - take the broadest & most involved case, start at the beginning & go to the end to show the integration points (trigger event, materials, place order, schedule work, show accounting & impacts)	

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Date	Vendor	Nuclear Pros	Nuclear Cons
15-May	IBM / Maximo	<input type="checkbox"/> Integrated scheduler (engrained in Primavera) - integrations allows user to look at the schedule <input type="checkbox"/> Parallel Processing <input type="checkbox"/> Manage interface - fields revealed <input type="checkbox"/> Software configuration can be built around the processes (will be a lot of work)	
	Comments	<input type="checkbox"/> Business scenarios will need to go deeper to consider advantages of systems (Ratiation work permit schedule, can use information from central) <input type="checkbox"/> Dynamic work package - can we see all the items in the archive (incremental app) <input type="checkbox"/> Limited number of nuclear users (growing). See what they have specifically for Nuclear. <input type="checkbox"/> Want to do a benchmarking trip - after Xcel energy Demonstrations <input type="checkbox"/> Flexibility will require a lot of governance & controls	
16-May	ABB / Ventyx	<input type="checkbox"/> Less of learning curve for distribution <input type="checkbox"/> Includes more processes for nuclear <input type="checkbox"/> Good focus on utility industry <input type="checkbox"/> Lots of apps (but would still have many of the same apps)	<input type="checkbox"/> Lots of products in different stages of development / architecture <input type="checkbox"/> No focus on workflows (overall) <input type="checkbox"/> Does not look different from what we have today like putting a Prom dress on a Pig <input type="checkbox"/> UI did not seem as user friendly - not clear what is there today.
	Comments	A lot of vision, but not a lot of deep dive today. Need breakouts by group, with more focused discussion on each area We want to see the best utility in action - references Reports & Security Changes have been most of what IT has spent their time on. Needed a tool in excel to extract data & present what we need (70% of the need).	
22-May	Oracle	Personal home page very cool Mobility built in Training for individual users Reporting very slick Integrated information gives us live info w/no (additional) data warehouse needed. Visual workflows - see where you are in the current process Modular deployment strategy - can take a piece at a time.	Don't see any nuclear experience or even Large Generation experience Terminology is different - can we customize to our speak Too much time on HR module Not sure if there is a lock out / tag out capability
	Comments		
23-May	SAP	In Memory Platform - very cool - real time accurate data across the platform In tech meeting - no upgrades / just enhancements, patches, no big upgrades Way of tracking changes in IT is very sophisticated. Configuration promotion is very controlled - upgrades go in and it runs. Changes are all configuration, not customization Visually easy on the eyes - Screens look the same as they did 10+ years ago Have some nuclear implementations	Not as flexible as other apps. Configuration is tight Assumptions hard coded may required too much constraints Lockout tagout Review cases.
	Comments		

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Date	Vendor	Energy Supply	Energy Supply
15-May	IBM / Maximo	<p style="text-align: center;">Pros</p> <input type="checkbox"/> Data Structure today is much like what we've seen today so conversion is likely to be pretty straightforward. <input type="checkbox"/> Cannot change identification of Riversource as a Coal plant. What happens if we move. <input type="checkbox"/> Ability to make changes saves us a lot of development effort. <input type="checkbox"/> Standardization vs. flexibility - we are seeking Standardization, though it will be difficult. Though we have a common system in 3 locations, we do not have common processes. <input type="checkbox"/> Can we replace eclipse? We would need to see more to know that this can happen. <input type="checkbox"/> Process Mapping reminds us of Blue Works. We do not have to start at square one. We have Users Group is an effective place to gain insights. <input type="checkbox"/> Ability to set different screens for different roles - reduce the number of times data needs to be entered. <input type="checkbox"/> Ad Hoc reporting - data pulled down into excel spreadsheet meets a current need for information. <input type="checkbox"/> Will still need Business Objects to produce operating reports <input type="checkbox"/> Ability to apply security by role would be helpful - like to explore further. <input type="checkbox"/> Single instances (security) shows that nuclear can be isolated.	<p style="text-align: center;">Cons</p>
	Comments	Are the scenarios & use cases currently at the right level of detail to see what we need to see?	
16-May	ABB / Ventyx	<input type="checkbox"/> Trying to sell us yesterday's technology tomorrow <input type="checkbox"/> Cobol programming is not what we expect today - their vision is right, but do we want to be the first to try it out? <input type="checkbox"/> Today we did not get the depth that we'd like to see (how many times do we need to click?) Need to see the system operate. <input type="checkbox"/> Did not hear about scheduling (a high priority) - Service Suite is being looked at. <input type="checkbox"/> A strong utility product - used primarily for work management (70% of the market North America) - Ask about Market Share and Market Share Trends. <input type="checkbox"/> They have a solid track record in the business, but less flexibility - they will dictate how the process works. Strength is embedded in Cobol code. <input type="checkbox"/> Little information provided with regard to their customer base.	
	Comments	Corporate passport has 150 customizations today	
22-May	Oracle	They got the Bling factor (but don't get blinded) What exactly is a field employee is going to see? Impressive across the board - how well do they do specific things Duke a major customer (they don't use them for work & asset management) Short term scheduling - Primavera is not a good response (outages, Plant work, Field applications, etc.) Did not see integration evidence - Primavera & Scheduling Scheduling scenarios should pull this out - we are OK there. How will they utilize a foreign scheduling tool? Their Drop down looks like Microsoft Project	
	Comments	Will need to determine, although they appear to be good across the board, but where does it need to be supplemented?	
23-May	SAP	Need to dive deeper re: how robust is the work execution Ask questions about lockout tagout Nobody showed anything in the safety systems area Follow up on a scenario & add critical incidents ERP plus a bolt on is what gives us the functionality (will probably still use primavera) - this is the roadmap discussion - How does this get put in place and in what order? How does the process all work together?	
	Comments		

RFI Evaluation & Comments

Date	Vendor	Technical
15-May	IBM / Maximo	<p style="text-align: center;">Pros</p> <input type="checkbox"/> Technical Fit –Maturity of Technology is much different that what we have today <input type="checkbox"/> Structures look normal –lots of flexibility, redundancy <input type="checkbox"/> Flexibility will require process & governance to maintain system integrity <input type="checkbox"/> We do not want to overly constrain functions in the name of control <input type="checkbox"/> Integration capability is pretty robust / open –can do point to point integration with ERPs’ <input type="checkbox"/> Integration with GIS –did not ask about this. <input type="checkbox"/> Mobile capability –app can operate in disconnected mode, or apply screens connected to a mobile app format. <input type="checkbox"/> No data warehouse –need to integrate with terra data (which is what we want) <input type="checkbox"/> Reporting is not Business Objects (environment called Burt). They can integrate with BO <input type="checkbox"/> Interaction with enterprise business process might be difficult to integrate beyond the boundaries of the App.
	Comments	Look for from Vendor that will alleviate work that we are doing today.
16-May	ABB / Ventyx	<p>Not going to say I loved it. Pro – moving off of current architecture Did not get visibility on where they are moving to today. We need to see what they are moving to. Elipse was presented as a tool that they are leveraging – don’t know what that is. Much of their future product is faith in what will be delivered by end of 2014 Move from Cobol – danger in copying bad habits into the new code base Page, scrolling does not show the best practices in presenting UI Did not provide integration & technology specifics – would need to see this. Want to be able to provide business configuration flexibility, but their approach seems restrictive for the business.</p>
	Comments	Behind the ball (due to acquisitions), it may be difficult to catch up. Mincom was another recent acquisition.
22-May	Oracle	<p>Technology Sound Able to Scale Tech footprint, able to Role based security & security standards Active Monitoring of slow response Integration architecture is mature The pieces are there to make the Mobile very user friendly</p>
	Comments	
23-May	SAP	<p>Foundation / architecture – very sound (no gaps are evident) The way they use the centralized data model helps eliminate some of the integration concerns Getting to that point from today will be a tough journey. How do we end up with a master list of vendors / need to rationalize the list of apps. Integrated suite (not so much integration) You need to use their They have strong lifecycle management (enhancement packs vs. support packs), can choose which to implement when. They provide great insight into the impacts when the packs are released. Scalability & performance (in memory) – will be very strong. Their in memory data base can be used instead of oracle or db2.</p>
	Comments	<p>Their foundation can be used for other mobility platforms – we will need to choose. They control the entire stack of their architecture – they have a service bus that might drive us to use different standards. They have a customer using this with 1.3 mil employees in China</p> <p>Business Systems: Did not hear anything on the small world side of it. SAP has a document management product embedded in the product They have a slight tax section, presentation on Finance was kind of weak Dashboards were presented, but did not spend all day on it. Work flows – process flows – they have it, but we did not see it. * Guided workflow for the end user, need to see this in our use cases.</p>

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Date	Vendor	Technical Cons
15-May	IBM / Maximo	
	Comments	
16-May	ABB / Ventyx	
	Comments	
22-May	Oracle	<p>Oracle Fusion is not there – they are building out their portfolio / may be soft on functionality Data dictionary is still evolving Core focus – they are a technology company Information was not available regarding how systems are talking with each other – they are not a utility company</p>
	Comments	
23-May	SAP	<p>Support impact – business systems would really need to be ramped up. Changes would need to be tightly controlled. Their support resources are very expensive – a major support cost SAP philosophy is that we use their components & do it their way (not so flexible as it is today) Can't see how we could migrate a piece at a time. If we diverge away from the SAP foundation, we would loose out on the benefits do the decision does not make sense unless we are committed (in policy and change governance) to the long haul. Build of configuration appears to be much more complex in order to provide the breadth of features.</p>
	Comments	