

**DEPARTMENTAL INPUT
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION**

Rev 1

New contract
 OTR
 CO
 SS
 BW
 Emergency
 Previous Contract/Project No.

Re-Bid
 Other (Government Access)
 LIVING WAGE APPLIES: __YES __X_NO

Requisition/Project No: RQET1400011 TERM OF CONTRACT: 6 year with 2 one-year options-to-renew

Requisition/Project Title:- MOTIO SOFTWARE LICENSE, CONSULTING, MAINTENANCE, AND SUPPORT AGREEMENT

Description: The purpose of this solicitation is to purchase the Motio CI-PI Software licenses, consulting, and maintenance and support services for additional administration abilities for the current Cognos BI environments installed on County servers in the Information Technology Department.

User Department(s): ITD

Issuing Department: ISD

Contact Person: Margaret Brown

Phone: 305-375-4914

Estimated Cost: \$51,878.29

Funding Source: General Fund

ANALYSIS

Commodity/Service No: <u>920-45</u>		SIC:	
Trade/Commodity/Service Opportunities			
Contract/Project History of Previous Purchases For Previous Three (3) Years Check Here <input checked="" type="checkbox"/> if this is a New Contract/Purchase with no Previous History			
EXISTING		2ND YEAR	3RD YEAR
Contractor:	<u>Motio, Inc.</u>		
Small Business Enterprise:	<u>No</u>		
Contract Value:			
Comments:			
Continued on another page (s): <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			

RECOMMENDATIONS

SBE	Set-Aside	Sub-Contractor Goal	Bid Preference	Selection Factor
		%		
		%		
		%		
		%		

Basis of Recommendation:

Signed: Margaret Brown

Date to SBD: August 7, 2014

Date Returned to DPM: _____

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2014 AUG -7 PM 1:51



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

Justification/Input Document for Non-Competitive Acquisition

It is the policy of Miami-Dade County to consistently purchase goods and services using full and open competition. The citizens of Miami-Dade County are best served when we make sound business decisions based on competitive bids or proposals. Early acquisition planning that includes consultation with Internal Service Department's procurement staff can help avoid delays and facilitates effective market research. However, there may be instances when other than full and open competition may be justified. When a user department(s) determines that other than full and open competition is necessary or in the best interest of the County, appropriate justification for that course of action must be submitted to ISD for approval and execution in order to waive the competitive bid/proposal process.

Please provide the information requested below to support the need and feasibility for waiving the competitive bid/proposal process:

Department:	Information Technology Department		
Contact Person:	Albert Falcon	Phone Number:	305-596-8314
Contact Person:	Susanna Guzman-Area	Phone Number:	305-596-8960
Requisition No.:	RQET1400011	Estimated Value:	\$28,145.95
Proposed Vendor:	Motio, Inc.		
Previous Contract Number:	N/A	Previous Contract Value:	N/A

Purpose of the Purchase
The purpose of this purchase is obtain additional Administration abilities for the current Cognos BI environments installed at the County. Cognos BI has been installed at the County starting with MDPD in 1998. In 2008, ITD signed an Enterprise License Agreement for the roll-out of Cognos BI reporting to all the departments in the County. The Enterprise Business Analytics Team(Cognos Support) will use these tools for 1) Versioning control of the Cognos entities, 2) Migration of reports from one Cognos environment to another (development to production) and 3) Additional Cognos Administrative tasks.

- 1) *Currently in the Cognos environments, there is no versioning or undo of Cognos reports. If a user deletes a report, it is deleted. With Motio, we can keep several versions of reports and roll-back changes or undo deletions of reporting.*
- 2) *Currently the move of reports and other Cognos entities from Development to Production is done manually by the Cognos Support personnel. In order to achieve a Quality Assurance environment and automatic move of these entities to Production, the tools in Motio are needed.*
- 3) *Additional Cognos Administration tasks such as: changing text or fields in various reports at one time instead of manually one-at-a-time, saves work by the Reporting Analyst and Cognos Support. Additional benefits are listed below.*

Benefits:

MotioCI:
Version Control for IBM Cognos - provides automated version control for Cognos content and configuration. MotioCI can version all types of Cognos objects, both inside and

outside the content store. Everything from Cognos reports, to folders, dispatcher settings or framework models.

MotioPI Pro:

Advanced Tools for IBM Cognos - empowers IBM Cognos administrators to more efficiently manage their BI environment's components, users, content, schedules, and more. MotioPI™ Pro efficiently administers Cognos information that's navigationally difficult to attain and allows management of BI content, settings and policies en-masse.

Motio PI Pro - Motio Private Investigator Professional - Professional Administration Software

Mass Query Features:

- Orphaned Objects: *Easily recover deleted Cognos users' Public & My Folders content*
- User Access: *Identify and export Cognos users' group & role memberships and security access*
- My Folders: *Inspect a user's My Folder content & storage capacity from their perspective.*
- Validation: *Verify pass or failure details for queries, analyses, agents & reports in bulk.*
- Schedule: *Document schedules associated with Cognos objects and their frequency of occurrence.*
- Cognos Output: *Stored results for Cognos reports, queries & analyses: who, what & when it was run.*
- Content: *Query & display policy, location, and ownership stats for Cognos objects*
- Environment: *Obtain comprehensive information on Cognos dispatchers, data sources, services & installed components.*
- Spec Viewer: *View report, query & analysis specifications.*
- Execution Time: *History and results for executed run time on any scheduled reports & jobs.*
- Model Panel: *Explore model elements, export contents to HTML or Excel, & Recover models from published packages*

Mass Update Features:

- Schedule Delivery: *Identify, manage & configure schedule allocations in batch*
- Bulk Update User Preferences: *Manage the preferences of entire groups of users en masse*
- Bulk update of Group / Role Memberships: *Bulk update the memberships of Cognos groups and roles*
- Model Editing: *Refactor Models and then apply changes to Content Store. Also offers direct publishing from MotioPI.*
- Property Distributor: *Quickly replicate selected properties from one Cognos object onto many other target objects*
- Templatizer: *Allows you to copy report elements from one report to many reports*
- Search and Replace: *Retrieve objects containing specific content, handles replacement and validates effect*

Best Interest of the County / Uniqueness of Product

Please provide a detailed description as to why a waiver of formal bidding is in the County's best interest (e.g., product standardization, compatibility, proprietary access or distributorship, how vendor is uniquely qualified to provide the needed product or service, etc.). Please note that a lack of advance planning is not an acceptable justification for a non-competitive acquisition.

Motio Inc. is the leader in third-party tools for Cognos Administrators.



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PROCUREMENT MANAGEMENT SERVICES**

MotioCI is the only product on the market that will allow us to do version control for metadata modeling. Metadata modeling is the core for Cognos BI to operate and we are now backing up our models manually before changes. However, if the model has been corrupted by changes, without asking around, we can't determine who made the changes or what the changes were. With MotioCI, we will have a versions of these updated models with the user, date and updates. We will also be able to recover models that have been completed deleted from our source files. This is not currently possible by the County's Cognos Administrators.

Cognos Support is looking to create a Quality Assurance environment, between Development and Production to enable for testing of reports and adherence to best practices and standards. These products will allow us to queue up reports for migration to the environments where we do them individually today.

A good portion of our day is migrating reporting changes from Development to Production. MotioPI Pro will assist us in having a standard time for migration of entities for a day instead of spreading them over the entire day. This is the only tool we know with this capability.

IBM is the Cognos vendor and their BI environments are the largest in the world. They use MotioCI and PI Pro for their migrations and versioning control.

Market Research

Please describe your market research and the results thereof. This should include a description of other, similar sources or products available in the market if any and why they are not acceptable.

There are other third-party vendors that supply migration of Cognos entities and recovery of metadata models. None of them currently offer versioning of the metadata models or batch migration of the Cognos entities which is needed by the County's Cognos Support staff. We have previously used MetaManager from BrightStar Partners which was found to be harder to understand and use and also much more expensive than the offerings from Motio.

Proposed Actions

Please describe the actions the department will take to overcome the present barriers to competition prior to any future acquisitions of this product or service.



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

If a new company develops or has software and is capable of doing the required work, ITD is always looking for companies that can participate in a competitive process.

Juan R. Hernandez
Department Director's Approval

July 10, 2014
Date Approved

Motio, Inc.
Product and Services Proposal

Motio™ Pricing Sheet

Client Name:	Miami Dade		
Project Name & Description:			
Quote Provided by:	Max Dodson		
Quote Date:	7/2/14	Valid Through:	8/1/2014

	Base	Qty	Extended Price
MotioCI™			
Entry Level	\$ 9,067.50	2	\$ 18,135.00
Version Control			
Complete Product	\$ 24,180.00	0	\$ -
Entry Level features plus full testing suite			
Testing Users	\$ 705.25	0	\$ -
Version Control Users			
Professional Authors	\$ 151.13	12	\$ 1,813.50
Authors	\$ 17.63	0	\$ -
Report Studio Integration	\$ 503.75	1	\$ 503.75
Total CI Server			\$ 20,452.25
Consulting Services - Time & Materials	Cost Per Day (8hrs)	# of Days	
Days Proposed	\$ 1,108.25	1	\$ 1,108.25
Total Consulting Services as Proposed			\$ 1,108.25
Total Product and Services as Proposed			\$ 21,560.50
5 License of MotioPI Pro for 1 year			\$ 2,495.00
Product Discount		0%	\$ -
Total Product and Services as Proposed			\$ 24,055.50
Annual Maintenance Fee			
20% Annually per year			\$ 4,090.45
Total Product with Maintenance			\$ 28,145.95

Non-Competitive IT Project Review

Directions for Completion: Departments requesting a non-competitive project review for new or existing Information Technology (IT) Systems are required to complete this questionnaire along with the appropriate Bid Waiver/Sole Source Justification Form. The response and explanation fields are to be fully completed to provide all background on the project. Please be as specific as possible and provide all backup documentation, doing so will expedite the review of your project.

The answers provided in the response field shall be according to the following format:

- "Y" – Yes
- "N" – No
- "N/A" – Not applicable

Current Contract Information:	
<u>Questions:</u>	<u>Response:</u> <u>Explanation:</u>
When and how was the IT software/hardware initially purchased by the County? (Please provide contract number, award info, and applicable documentation)	N/A This is the initial purchase of the Motio software.
When does the current contract expire?	N/A No current contract.
If the contract has expired, how are/have you been maintaining the IT hardware/software? (Provide explanation and documentation if applicable)	N/A No current contract.
Was maintenance and support included in the current contract? If no, why not? Did it include assistance with transition to a new system?	N/A No current contract.
What other applications does the System integrate/interface with?	N/A No current contract.

Non-Competitive IT Project Review

<p>If a new system were deployed would it still be necessary to support the current system in parallel? How long would the legacy system need to be maintained and operational? Could historical data be stored in a data warehouse? What would be the cost?</p>	N/A	<p>Administrative software only.</p>
<p>What is the purpose of this IT hardware /software? What is the expected life cycle?</p>	Y	<p>The Motio software will be used by the Cognos Administrators and metadata modelers at the County for versioning control of the metadata models and the Cognos BI entities.</p>
<p>Is this product an integral part of the County / Department's technical infrastructure? Does it perform system critical functions? If so, what?</p>	Y	<p>Versioning control of the Cognos BI entities.</p>
<p>Are these solutions delivered through the Original Equipment Manufacturer (OEM) support? If no, is it delivered through authorized reseller or dealers?</p>	Y	<p>Through Motio Inc.</p>
<p>On the current contract, is the User Access Program (UAP) and Inspector General being collected?</p>	N/A	<p>No current contract.</p>
<p>Does the current contract require insurance? <i>(Note: Any vendor required to come onto County property is required to have insurance throughout the term of the Agreement.)</i></p>	N/A	
<p>Have you encountered any issues during the contract term regarding performance or compliance?</p>	N/A	<p>No current contract.</p>
<p>Have you been satisfied with the performance of the vendor to date?</p>	N/A	<p>New product purchase.</p>

Non-Competitive IT Project Review

Market Research:	Response:	Explanation:
Questions:		
<p>Are there available equivalents to the product or service you are requesting for this new project? <i>(Please provide documentation regarding your Department's market research)</i></p>	Y	<p>There are two vendors with products that do similar functions to Motio. BrightStar Partners (BSP) product "MetaManager" and Technology Dynamics Inc. "TechD Administrator"</p> <p>BSP's MetaManager tool has been used at ITD for the past 4 years. We only have 2 copies and is very cumbersome to use and is rarely used by the Administrators. The MetaManager tool is much more expensive than Motio. Each license of MetaManager is \$20,000 and we would need \$40,000 additionally for the current Cognos Administrators.</p>
<p>If there are available equivalents, why do these products not meet your needs? What are the differences? <i>(Please be as specific as possible to provide sufficient detail to justify your request.)</i></p>	N	<p>Technology Dynamics Inc. TechD Administrator tool has been installed as a pilot project recently. However this product does not provide versioning of the Cognos entities and that is a major point to why we want to purchase Motio. Also Technology Dynamics Inc. is a new company with products that are not widely used by the BI industry.</p> <p>The products from Motio Inc. have been around the industry for many years and is the recommended versioning tool for Cognos as IBM uses Motio for their own Cognos entities.</p>
<p>Can the vendor meet your long term needs? What research has been conducted to verify their ability to meet your expectation? <i>(Please provide documentation, as applicable, to show your findings)</i></p>	Y	<p>Motio Inc. has been around for many years and is a major player in the third-party tools for Cognos. IBM recommends Motio for the versioning control and also uses Motio for their Cognos environments.</p>
<p>What other vendors offer systems capable of providing the County with a solution?</p>	Y	<p>As stated above – BrightStar Partners and Technology Dynamics Inc.</p>

Non-Competitive IT Project Review

<p>Are these solutions delivered through the Original Equipment Manufacturer (OEM) support or is it delivered through authorized reseller or dealers.</p>	Y	Through Original Equipment Manufacturer
<p>Are dealers required to complete a certification program or are they restricted to levels of support set up by the vendor/mfg? <i>(i.e. gold plan vs. platinum plan – gold allows vendor to maintain equipment but they do not have access to software upgrades or new system implementations. Platinum allows vendors to complete new product installs and all other support).</i></p>	N	<p>No certification is needed by the vendor. The installation of the software will be down by the ITD Cognos Administrators.</p>
<p>What level support does the County require for this new project?</p>	N	<p>Low level support – only for installation questions.</p>
<p>Are there other systems currently employed by the department / County that are similar that could provide a solution?</p>	N	<p>No Cognos versioning control software is installed or used in the County.</p>
<p>If a new system were deployed would it still be necessary to support the current system in parallel?</p>	N	<p>The support for the current BrightStar Partners MetaManager tool has been suspended. This software will be uninstalled when Motio is installed.</p>
<p>How long would the legacy system need to be maintained and operational?</p>	N/A	<p>No legacy system involved.</p>

Non-Competitive IT Project Review

<p>Could historical data be stored in a data warehouse? What would be the cost?</p>	<p>N/A</p>	<p>Application data is not involved with this software.</p>
<p>Has the replacement system been reviewed and approved by the IT Leadership Council?</p>	<p>N/A</p>	<p>Not applicable.</p>
<p>New Project Information:</p>		
<p>Questions:</p>		
<p>What are the business goals and objectives of this new project? (Please be specific)</p>	<p>Y</p>	<p>Explanation: The Motio Ci and PI Pro software will be used by the ITD Cognos Administrators and the Framework Manager users in the County to allow for versioning control, migration and backup/recovery of Cognos BI reports, dashboards and metadata models for the Cognos enterprise intranet environments. Since coming up in production in 2009, the reporting environment has grown to over 40 reporting applications used by all departments and over 5000 County users. This software will allow the Cognos Administrators the ability to backup and recover reports, dashboards and models that may be deleted or updated incorrectly. Currently, there is no simple way to do this. Also, this will assist in our migration plans of the Cognos entities and will serve as a step in creation of Quality Assurance of the Cognos reports in the Analytics Center of Excellence.</p>
<p>What contract term would you like established? (<i>Initial term plus any renewals</i>)</p>	<p>Y</p>	<p>Initial term plus 5 years renewal.</p>

Non-Competitive IT Project Review

What allocation is requested on this new project? What is the basis of the allocation request? (i.e. Vendor quote, market research, etc)	Y	Vendor quote.
Please provide documentation if applicable.		
What is your funding source(s) for this new project?	Y	Partial funding from result of non-payment of BSP MetaManager support. Partial funding from General Fund.
Is this a grant funded project? If so, please provide grant documentation outlining the expiration date and requirements.	N	
What budget year is it scheduled for?	2013-2014	Not grant funded.
Is the allocation enterprise or department based?	Y	Department based.
Scope Information:		
Questions:	Response:	Explanation:
Please provide a high level overview as to the scope of this project. A defined scope of work is to be provided with your submission.		<p>The Motio Ci and PI Pro software will be used by the ITD Cognos Administrators and the Framework Manager users in the County to allow for versioning control, migration and backup/recovery of Cognos BI reports, dashboards and metadata models for the Cognos enterprise intranet environments.</p> <p>Since coming up in production in 2009, the reporting environment has grown to over 40 reporting applications used by all departments and over 5000 County users.</p> <p>This software will allow the Cognos Administrators the ability to backup and recover reports, dashboards and models that may be deleted or updated incorrectly. Currently, there is no simple way to do this.</p> <p>Also, this will assist in our migration plans of the Cognos entities and will serve as a step in creation of Quality Assurance of the</p>
	Y	

Non-Competitive IT Project Review

		Cognos reports in the Analytics Center of Excellence.
What is your Project Timeline?	Y	Motio software to be installed the week or week after the purchase has been completed.
What are the roles and responsibilities of the vendor?	Y	Training of the 4 ITD Cognos Administrators via webinar for the installation of the software and overview of usage.
What are the roles and responsibilities of the County?	Y	Creation and installation of database schema to maintain Cognos versioning. Installation of Motio software, usage of software and training of additional personnel in software.
Software Acquisitions:		
Questions:		
Is this a replacement of an existing software/system?	Y	Replaces BrightStar Partners software - MetaManager
Is the software perpetual? If so, please provide a copy of the license agreement with your submission.	Y	Renewal is yearly.
Do you require professional services on the new contract? (i.e. Training, custom programming, consulting)	Y	Installation and training is included in the contract.
How is the software licensed? (i.e. Per User, Enterprise, Concurrent User, Site)	Y	Per user and environments.
How many users?	Y	12 Framework Manager (FM) users and 2 enterprise environments.
Do you want/need the new contract to provide the option to purchase additional licenses or services during the term?	Y	We will need to purchase additional licenses depending on the FM users and will probably increase the number of environments to 4 eventually.
Do you require training for users on the new contract? How many users are to be trained? Levels?	Y	Installation and training is limited to 1 day for the 4 Cognos Administrators. Vendor will supply training via webinar.

Non-Competitive IT Project Review

Where is the software hosted?	Y	At ITD.
Do you have a disaster recovery plan? If no, is the vendor required to provide collocation under the new contract?	N, N	This is a backup and recovery plan for Cognos BI.
What are your long term plans with the system?	Y	Long-term use of this software for integration with Cognos BI
Do you have the source code?	N	Not needed.
Would you like software escrow added to the new contract?	N/A	
What is the life expectancy of the software? What value does this project provide to your department?	Y	No term. The Motio software provides versioning control of the Cognos entities and back-up and recovery of the Cognos reports.
Hardware Acquisitions:		
Questions:		
Was maintenance and support included in the original contract? If not, why?	N/A	
Did it include assistance with transition to a new system?	N/A	
Is this product an integral part of the County / Department's technical infrastructure?	N/A	
What are the requirements for maintenance and support under the new contract?	N/A	
Will the vendor be required to come onto County property to provide technical support/assistance? If not, how will this be accomplished?	N/A	

Non-Competitive IT Project Review

What level of support is required by your Department under the new contract? (i.e. 24x7, onsite repair, parts, etc.)	N/A
Does it perform system critical functions? If so, what?	N/A
What would be the effect to the County if the maintenance / support services were not obtained?	N/A
What other systems does the hardware integrate/interface with?	N/A
Will the new contract require the vendor to maintain these integrations/interfaces with these systems also?	N/A
What is the life expectancy of the hardware?	N/A
What value does this project provide to your department?	N/A
Do you need to have the ability in the new contract to purchase additional hardware components, parts, or services? If so, please provide a detailed explanation as to your Department's requirements.	N/A