

MODIFIABLE RFP TEMPLATE & VENDOR Q&A RUBRIC | VNA-RFP-007 | Application Stack X to Application Stack Y

Request for Proposals (RFP): Microsoft Access (.accdb / .mdb) & Excel VBA Macro Migration to Oracle APEX 24.2

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 Microsoft Excel (.xlsx, VBA Macros), MS Access (.accdb/.mdb) & Lotus Notes to Oracle APEX 24.2 Data Apps, Autonomous Database & AMP Governance
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] Automated Workbook & Access Schema Normalization: We ingest your `.xlsx`/`.xlsm`` sheets and `.accdb`` tables/queries, normalizing repeating columns into relational 3NF tables on Oracle Database 23ai / Autonomous Database with automatic foreign-key constraints.
- [REQ-ARCH-02] Spreadsheet-Speed Interactive Grids: Users do not lose their spreadsheet ergonomics. We configure APEX 24.2 Interactive Grids with multi-cell copy/paste from Excel, inline keyboard navigation, freeze panes, column aggregations, and private saved views.
- [REQ-ARCH-03] VBA Macro & Formula Pushdown to PL/SQL: Fragile Excel formulas and VBA macros are converted into deterministic, unit-tested PL/SQL packages and APEX Computations that execute identically for every user.
- [REQ-ARCH-04] Native Excel Upload/Download & Workflow Approvals: Built-in `APEX_DATA_PARSER`` pipelines allow users to drag-and-drop vendor `.xlsx`/`.csv`` files with instant row-by-row validation exceptions, routed through native APEX Approvals and AMP audit logging.
- [REQ-ARCH-05] Query Fan-Out Rationalization & Runtime/Inference Filtering: Instead of migrating cloned reports and DataWindows 1-for-1, our AST SQL parser clusters queries by their canonical core JOIN graph, builds governed Oracle 23ai views only for those core queries, and generates dynamic WHERE clauses, faceted filters, and ad-hoc report variations at runtime and via AI inference (APEX 24.2 Smart Filters & Select AI).

3. Component Conversion & Acceptance Matrix

Legacy Artifact / Workload	Required Target Architecture	Engineering Method & Acceptance Gate
Excel Multi-Tab Workbook (<code>.xlsx` / `.xlsm`</code>)	Normalized Oracle Schema + APEX Interactive Grids	Automated Data Modeling & Bulk Ingestion
Excel VLOOKUP / XLOOKUP / SUMIFS Formulas	Relational Foreign Keys, SQL Analytic Views & LOVs	Referential Integrity Enforcement
VBA Macros & MS Access Event Modules	Oracle PL/SQL Packages + APEX Dynamic Actions	Server-Side Business Logic Pushdown

MS Access Forms & Subforms (.accdb)	APEX Master-Detail Pages & Modal Dialogs	Responsive Universal Theme 42 Conversion
Emailed Spreadsheet Approval Chains	APEX 24.2 Unified Task List & Approval Workflows	Role-Based State Machine & Email Notifications
Cloned Reports / Queries Differing Only by WHERE Clause or Group-By (Query Fan-Out)	Canonical Core SQL View + APEX 24.2 Runtime / AI Inference Filters	AST Join-Graph Clustering (75-90% Report Count Reduction)

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: Can finance and operations users still copy-paste blocks of cells from Excel and export back to Excel? [Score: ____ / 10]

Reference Evaluation Benchmark: Yes. We enable bulk clipboard paste and `APEX\_DATA\_PARSER` drag-and-drop uploads with staging validation, plus one-click native `.xlsx` exports with formatting preserved.

Vendor Question 2: How do you prevent departments from creating new ungoverned Access databases? [Score: ____ / 10]

Reference Evaluation Benchmark: We deploy a central Oracle APEX 'Data App Factory' governed by Viscosity AMP so new departmental apps can be spun up with SSO, audit logging, and backup policies in 48 hours.

Vendor Question 3: What is included in the downloadable PDF Solution Brief? [Score: ____ / 10]

Reference Evaluation Benchmark: The PDF Solution Brief includes the Shadow-IT-to-APEX assessment scorecard, the `APEX\_DATA\_PARSER` validation pipeline pattern, and 4 real-world anonymized reference architectures.

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%