



BUSINESS INTELLIGENCE SOFTWARE

REQUEST FOR PROPOSAL

Lane Regional Medical Center
Attn: Rhonda Ancar, Director of Materials Management
6300 Main Street
Zachary, LA 70791

Wednesday, December 4, 13

Intellego is a Business Intelligence and Analytics consulting company specialized in information, processes and IT management solutions; over 1,400 professionals are part of this company, which has operations both in Latin America and the United States.

Committed to:

- Our customers, who will receive high quality solutions, supported by a company who responds effectively to their needs.
- Our employees, who through their integral growth are compensated according to their productivity and contribution in a solid and challenging working environment.
- Our associates, who will receive growing economic benefits resulting from the achievement of strategies and established objectives.
- Our partners, who establish relations aimed to add value in the products and services we offer.

Intellego has been appointed by IDC* as the number one Information Management and Business Intelligence services provider in Mexico.

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Wednesday, December 4, 13

Attention:

Lane Regional Medical Center

Attn: Rhonda Ancar, Director of Materials Management

6300 Main Street; Zachary, LA 70791

Reference: BUSINESS INTELLIGENCE SOFTWARE RFP

Dear Ms. Ancar,

INTELLEGO appreciates the opportunity to present our value proposal for the **BUSINESS INTELLIGENCE SOFTWARE RFP**. We reiterate our commitment to become your strategic business partners during this process and in the course of its evolution and growth. In the following pages, we are confident that we have provided you with a compelling response to your stated requirements.

You have my personal assurance that I will do everything possible to make certain that your implementation initiatives are an immediate and long-term success. Please do not hesitate to contact me at 786.479.0750 if you have any questions or require any further assistance. We look forward to hearing from you and to the opportunity to partner together to achieve your goals.

Respectfully,

Miguel Molina-Coscolluela

Director

INTELLEGO

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Response to Questions from RFP

Vendor Information

- Name and address of your company:

Intellego Consulting LLC
1800 SW 1st Ave, Suite 502
Miami FL 33129

- Please indicate the name, title, address, phone, and email address of the company's primary representative/contract.

Miguel Molina Cosculluela,
Business Development Director
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+1.786.479.0750
mmolina@intellegogroup.com

- Is your company privately or publicly owned?

Privately Owned

- How long has your company been in the business of developing and marketing your products?

+12 years

- How many people does your company employ?

+ 1,400

- Does your company support formal user groups?

Yes ☐ No ☒

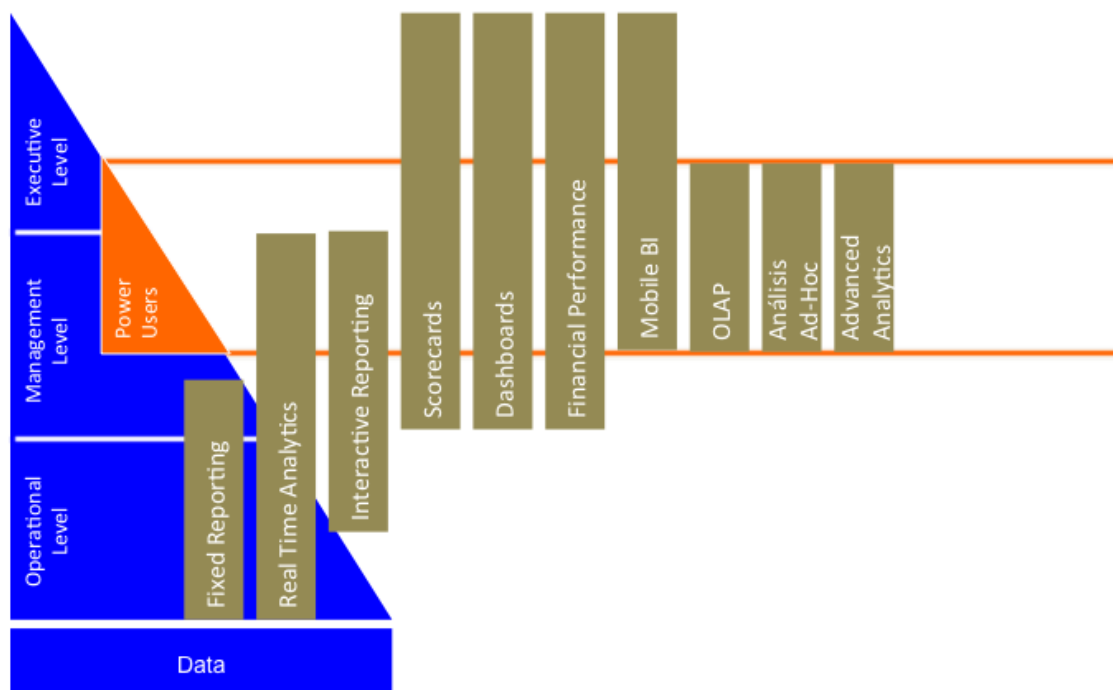
- What is the estimated initial training time? Describe the recommended process.

As expected different trainings are prepared for different types of users:

- Developer Level
- Operational Level
- Management Level
- Executive Level

Developer level is the training that requires more time. Developers learn how to create new reports, and dashboards, how to access data sources and how to publish the analytical objects.

Operational users receive a comprehensive training that covers all modules and drill-downs and cubes available for analysis, as we move further up towards the executive level the dashboards get to be more visual and therefore less training is required.



The recommended initial training is as follows:

1. Developer Level: 2 weeks
2. Operational Level: 1/2 week
3. Management Level: 1 day
4. Executive Level: 2 hours

- How is your product licensed? Site: ☐ Concurrent: ☐ User: ☐ Other: ☐
- Our product is managed as Software as a Service (SAAS), in other words, it is a pre-configured service that provides Business Intelligence applications with

remote access through standard browsers or mobile devices. It is based on Cloud Computing thus eliminating the need to invest in infrastructure and software. Licenses are paid on a per user per month basis.

- Explain how your system integrates/interfaces with Meditech systems:

Our system is based on Java technology and uses JDBC and native access to third party databases. In the case of Meditech system, which is based on SQL Server technology, a JDBC connection to SQL Server would be created. The client will have to provide us with the name of the database, connection data and credentials. After the connection is created, the data will be accessed at table and field level.

- Does your system work with data received from other systems? Explain:

Our system can work with several data sources. Practically it can connect to all the major databases brands. Once the connection is established as specified in question 9, the data is extracted, transformed and loaded to our data warehouse. From this point, the data can be analyzed and presented using the front end tools.

- Can your system build reports from multiple databases (ex: GE, Meditech)?
Yes ☒ No ☐

- Is access to data fields real-time? Yes ☒ No ☐

- Can you drill down to the transaction level from all reports? Yes ☒
No ☐

For questions 12 and 13 please note that although it is technically possible, accessing transaction levels on real time may hinder the performance of the transactional system.

- Are standard reports delivered with the system: Yes ☐ No ☒

- Explain the report distribution options:

Reports are accessible via any web browser or mobile device, virtually from anywhere. It is possible to allow only a specific range of IPs access to the system. Our proposal is based, as mentioned before, on Cloud Computing thus eliminating the need to invest in infrastructure and software.

- How is user access controlled?

Our tool has a complex structure of users and roles. Through this structure, it is possible to control the access of the individuals not only to the tool, but also to specific reports and dashboards, and even, to specific database values.

- Does your system integrate with Active Directory? Yes ☒ No ☐

Our system can integrate with Active Directory via the LDAP protocol for user authentication and authorization.

- How are your licenses structured? Please explain how users of report licenses are structured as opposed to users who setup and maintain the parameters, queries, and other administration duties:

Our licensing scheme works really simple, below an example on pricing versus number of users.

Bundle	Number of users	Maximum data volum	Monthly Payment (USD)	Price/user (USD)
CloudBI 5	5	2.5 GB	\$ 299	\$ 59.99
CloudBI 10	10	5 GB	\$ 499	\$ 49.99
CloudBI 25	25	12.5 GB	\$ 899	\$ 35.99
CloudBI 50	50	25 GB	\$ 1,599	\$ 31.99
CloudBI 100	100	50 GB	\$ 2,699	\$ 26.99

- Please describe what percentage of your system can be handled via a web browser?

100 % of the system can be handled via a web browser. We're proposing a Cloud-based solution given the scalability, competitive pricing and

implementation speed as we believe this solution will work best with the current needs of the Lane Regional Medical Center.

Find below an image explaining how our proposed solution works:



- Please describe your current capabilities for supporting mobile device access?
Our tool is accessible via mobile devices' web browser. The devices that are supported are those that run iOS (version 5 and newer), Android and Windows Phone.

- Describe systems ability to meet external regulatory and accreditation data reporting (CMS Quality Measures, Joint Commission, Meaningful Use, etc.)

Since CloudBI is a SaaS offering, any required updates or modifications to the system can be implemented and deployed without needing to install new versions on each computer or device.

When a regulatory requirement impacts the system (e.g. CMS Quality Measures, Joint Commission or Meaningful Use regulations), a change request must be made to Intellego, in order to modify the components related to the business rules affected by any relevant regulations.

- What is your process for maintaining compliance with coding changes (ICD-9 to ICD-10) and other regulatory changes that impact quality reporting (Value Based Purchasing)?

If we consider that coding and regulatory changes would be applied to the source systems, these will be automatically applied when extracting the information.

If the case above does not apply, then the reporting catalogs affected by the coding or regulatory change must be updated by an Intellego consultant, with the new information to be added or modified, provided by a Lane Medical Center member.

- Explain the services you provide for data migration and training:

Our company provides turnkey projects related to Business Intelligence and Data Management. In this, our services include from project planning and analysis, to the final deployment, training and support.

Our services also include data migration such as:

- Data base migration (from one version to another)
- Data base migration (from one brand to another)
- Hardware migration
- Application migration

- Explain where and how training is accomplished

Training is accomplished at our client's location. We analyze the profile and knowledge of our clients' stakeholders and design the courses based on them. Also, we design specific courses depending on the role and interaction that the participants will have with the implemented solution.

- If your system is broken down into separate modules, please issue the pricing for each module separately with a brief explanation of how that module relates to the questions in this document.

The tool is not separated into modules.

Project Proposal

Project Timeline

Our estimation is to have the project ready and live after 46 days. This guesstimate will be refined once we start the analysis and design.

	Total days	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46
Kick-off meetings	0																																														
Analysis and Design	0																																														
Solution Development	0																																														
QA and final testing	0																																														
Go Live	0																																														

Resource Planning

Four consultants will be involved in the development of the project, you can find below the workload we're estimating for each:

- Project Leader
- ETL Consultant
- Front End Consultant
- QA Consultant

	Total days	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	
ETL consultant	27								1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1									1	1	1	1	1	1	1	1	1	1				
Front-end consultant	24								1	1	1	1										1	1	1	1	1	1	1	1	1	1	1			1	1	1	1	1	1	1	1	1					
QA consultant	5																																1	1	1	1	1											
Project leader	22	1	1	1	1	1	1	1	1	1	1	1					1					1					1					1			1								1	1	1	1	1	1

Overall Cost of the system

- Implementation: **\$49,900 USD***
- Licensing: **\$26USD** per license per month

Cost of Training

Training:

- 1 workshop for Developers
- 1 workshop for Operational users
- 1 workshop for Managers
- 1 workshop for Executives

Each workshop is intended to have a maximum of 10 attendants.

Length of workshop:

1. Developer Level: 2 weeks
2. Operational Level: 1/2 week
3. Management Level: 1 day
4. Executive Level: 2 hours

12,000 USD*

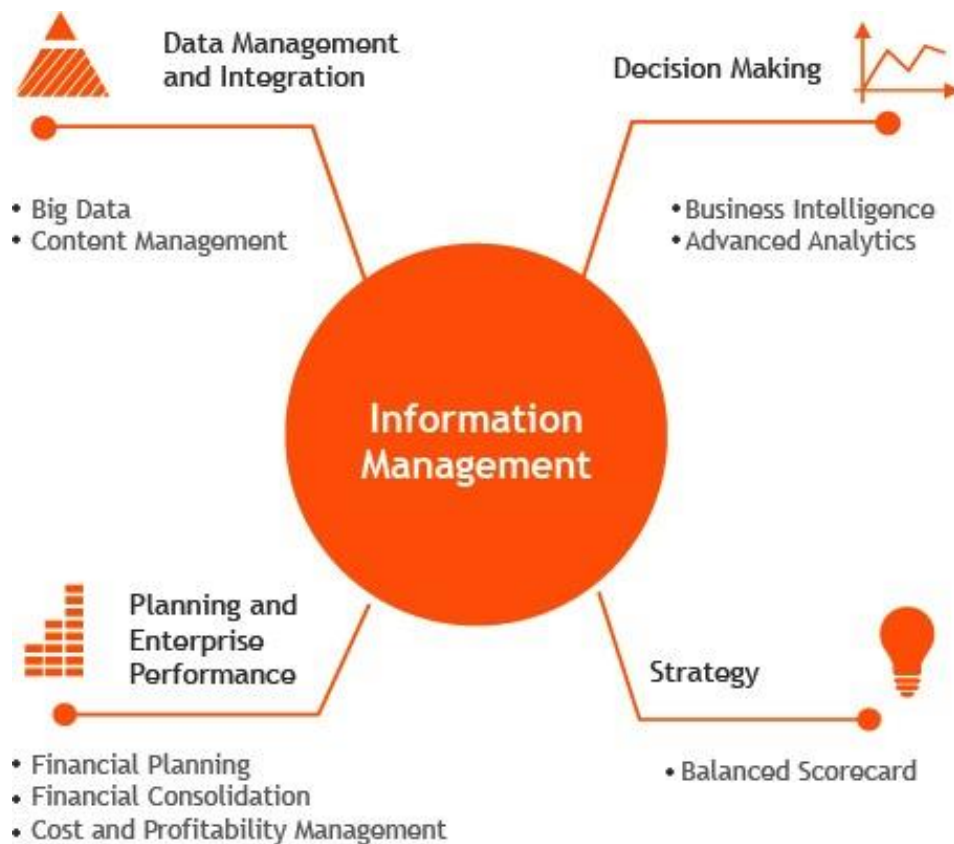
*Travel expenses not included.

Assumptions and Scope

- A person from the IT team at Lane Medical Center should be available to clarify data mapping topics.
- Four data sources are being considered, one of them being the Meditech Data Repository. The other 3 data sources are considered to be databases with a JDBC available for extraction purposes.
- No Excel, CSV, or plain text files are considered as data sources.
- Eight dashboards, containing up to 4 elements (charts, tables) each, will be implemented.
- A data warehouse, containing the information extracted from the data sources stated above, will be developed. It can contain up to 15 measures/KPIs, with up to 10 dimensions.
- The data warehouse will be stored in the CloudBI cloud environment.
- Each calculated measure counts as a measure on its own (e.g. the number of patients in a given period counts as one measure; the number of employees in a given period counts as another measure; the ratio of patients to employees is a measure on its own.)

Our Experience

Intellego's DNA is clearly defined by our experience designing and implementing business intelligence projects, since 1999 when the company was founded we've been strengthening our practice equally on the private or public sector. Today, we have key alliances with all the BI leaders (i.e. SAP, Oracle, Microsoft, IBM, HP, etc) and it's been precisely our agnosticism towards technology one of our strongest value propositions.



Intellego features ample experience in project development. In order to achieve excellence, all of our consultants are certified in the Consulting Methodology of Intellego, and more than 50 are certified by the PMI as Project Managers. Furthermore, we feature certifications on outstanding technologies, some are:

- **CMMI5:** Intellego's Software Development Center is certified with level 5 in maturity of CMMI (Capability Maturity Model Integration). In Mexico, only 8 organizations have reached level 5, which represents a significant difference in the national market as well as in the international market.
- **SAP:** Certified SAP Partner. Intellego has integrated other products of SAP family in order to strengthen its portfolio, such as: EPM, All in One, Mobility (Sybase y Afaria) and Hana.

- Oracle: We feature the maximum acknowledgement given by Oracle to its partners, it shows our experience and specialization in a great variety of Oracle's products.
- Intellego has specialized on Information Systems focused on Data Warehousing, Business Intelligence and SOA- Data Integration. We are a platinum partner with 5 specialties, among them: Business Intelligence, Database, Essbase, Hyperion Financial Management and Hyperion Planning.
- Microsoft: Our certifications rated Gold and Silver in Microsoft show our ability for the implementation of to implement solutions and positions Intellego as an expert that you can trust for the implementation of powerful and relevant projects.

Experience Table

Client	Project Date	Project Type	Goods/Services Provided
Pemex	2010-2011	HR DWH	Developed besides a SI the Business Intelligence and DWH for the HR department. The project also involved the configuration with the budgeting and financial department.
Human Rights Commission	2005	Decision Support Solution	Gathering of requirements and implementation of a Decision Support system for the Human Resource department.
Televisa	2010-2012	DWH, Business Intelligence & Balanced Scorecard	<p>Modifications, changes, improvements and updates to the BI Sales software from Televisa in order for the software integration to the On Air platform.</p> <p>Development of a business board with the information coming from the system known as: Hyperion Performance Scorecard (HPS).</p> <p>Development of diverse functionalities of the application QlikView III.</p> <p>Implementation of dashboards for 9 business areas in the system known as: <i>Sistema de Administración de Información Oportuna</i> with financial and operational indicators from Grupo Televisa.</p> <p>Implementation of <i>Sistema de Información de Administración San Angel</i>, data warehouse with information from more than 10 different systems as sources.</p>

Client	Project Date	Project Type	Goods/Services Provided
Coca-Cola FEMSA	2010-2011	HR and Finance BW	Implementation of BW for the commercial team for the HR and Finance modules, as well as performance improvements on BW.
TACA	2012	HR Planning	Design and implementation of Oracle Hyperion Planning for HR, based on 3 main aspects: Land employees, Pilots and flight Aux.
Mexican Presidency	2003	BI Roadmap and Implementation	<p>National War Room: Design and planning of a centralized BI room with metrics from the main government institutions.</p> <p>Some of the benefits obtained:</p> <ul style="list-style-type: none"> - Simplified the reporting system for the President, instead of having many reports, using different formats, common and specific KPIs were defined as part of the Central Dashboard. - Provided access to various balanced scorecards to different Secretaries of State. - Dashboard was generated using multiple sources of data.
South Florida Water Management District	2012	Implementation Plan and roadmap	Provided the district with an independent opinion on the situation around SAP and integration points, as well as defined the TCO (Total Cost of Ownership) for the SAP environment and finally generated a roadmap for the District SAP strategy.

Experience in the Healthcare industry

Below you'll find different case studies from some of our customers in the healthcare industry.

Clinica Alemana:

- Country: Chile
- Activities:
 - Planning & Budgeting model (P&L) with Hyperion Planning
 - Financial Management Model – financial performance & expense indicators
 - Commercial Management Model – revenue source indicators
 - Clinic Indicators Model – identify and analyze efficiency indicators as well as sources of pathologies
 - Hospital & Ambulatory Management Model
 - Diagnostics Center Analysis Model
- One of the main sources of data for the different analysis models is the medical record repository, which is extracted from the transactional systems. This medical record repository is an in-house development.
- Except for the Planning & Budgeting model, all models have been implemented using an Oracle database as the data storage repository and the reports & analysis are done using Oracle Business Intelligence Enterprise Edition. For the data movement from the transactional systems to the data warehouse we have used the ETL tool Oracle Data Integrator.

ISSSTE:

- Country: Mexico
- Project name: Financial Business Warehouse
- Activities:
 - Analysis of functional requirements in the business area (financial planning, design delegation, virtual costs)
 - Creation and modeling of hubs, DSOs and nonstandard multi-hubs
 - Report creation for Report Designer, Query Designer, and Web Application Designer with geo-referencing functionality in BW 7.0 across SAP Portals
 - Tuning a BW system (additional design, physical and logical hub partitions, hub compression, query redesign)
 - Note application
 - Driving SAP Marketplace
 - Creating and segmenting OSS messages
 - Technical and functional user training
 - Time and resource training

- Results:
- Reporting platform migration
- Technologies used: SAP BW 7.0., SAP Portals

Mexican Social Security Institute (IMSS):

- Country: Mexico
- Project scope:
- Design of a single database – phase 1
- Management model of the single database
- Information standardization
- Definition of information lifecycle management (ILM)
- The cost estimate of ABC for service lines, medical benefits, economic benefits, social benefits, and incorporation y collection
- Mapping process
- Hyperion Essbase, model analysis, design, and development to address:
- Types of insurance
- IMSS, Mexico
- Development of automated model for determining the allocation for each type of coverage

Specialized Pharmaceuticals:

- Country: Mexico
- Focus: Medical Distribution Group
- Project Scope:
- Control and analysis board for pharmaceutical Industry
- Technical training
- User training
- Report and consultation explanation
- Control board of charges for the pharmaceutical industry in the area of sales and procurement.

Wyeth:

- Country: Colombia
- Focus: Medication Distribution
- Project Scope: Hyperion Planning. Revision and correction of issues related to financial planning models for Wyeth, Colombia.

Healthcare Services: Grupo Ángeles:

- Country: Mexico
- Project name: Hospital Angels Control Board
- Activities:

- Quality Assurance in the extraction processes, data payload transformation, data migration
- Results:
- Existing data payloads moved to the Data Warehouse provided by the transactional systems at the hospital
- Technology used: SQL Server 2000.

About BI on the Cloud - CloudBI

A recent paradigm that appears to be evolving the history of modern computing is that of cloud computing. There are a variety of definitions in the industry for this concept, and it tends to bind exclusively to the SaaS (Software as a Service) schemes, but is a reality that not everything that is offered as administrative service over the internet is Cloud computing. One of the more accepted definitions is what of the National Institute of Standard Technology in the U.S. has established that an enabling model of convenient access on demand to a set of shared information resources on the part of the resource provider.

This model over the cloud promotes availability and is composed of five essential characteristics, three service models and four deployment models. There is an ever growing number of applications beginning to reside and operate on the cloud. This has been achieved gradually, thanks to the advances the providers have had in working over this model, but above all, the confidence that the customers have generated in this type of service. Some of the applications that are more popular have had in the cloud are: email, Client Relationship Management (CRM) applications, system and data storage for Enterprise Resource Planning (ERP).

One of the more recent applications to arrive to the Cloud Computing model is Business Intelligence (BI). Given the how these systems are typically accessed by the end user, BI is a strong candidate to be accessed through the cloud, such that the decision makers only require a web browser to reach the data analysis. Nevertheless, some users have identified obstacles that could impede BI tool gathering toward the cloud, such as:

- Security
- Performance
- Availability
- Integration
- Transferring large volumes of data

Fortunately, there exists an answer for each one of these obstacles, of which BI has been made in the cloud to be now a reality. In the following paragraphs it is explained briefly how each one of these elements is assisted with technology and current processes.

Security



Security is perhaps the primary concern of users that are migrating to a cloud environment. This restlessness is not exclusively for BI, rather the previous applications also they have faced. Nevertheless, BI has had a big challenge, given that it exposes large volumes of data produced within organizations to be sent to the cloud over the internet.

Conducting security ought to be done with care, especially with regard to two points: during transfer by unsecure means (internet) and during storage in the cloud. Notwithstanding, it needs to be mentioned that the physical and logical installations of the cloud service providers at the global level depend on systems that are more robust than that of the average business could have on their website, achieving a first instance of best level of confidentiality and integrity of information.

The mechanism that is utilized to guarantee security during the transfer is the encryption of data. Once the data is extracted from the source, it is encrypted. Depending on the algorithm that is being used, it becomes practically impossible for any unauthorized person to access the data during transfer over the web. Now that it is in the cloud, this data is decrypted and later transformed to complete the cycle of BI. It must be mentioned that the process of encryption will be bound with the process of compression, which will be covered later on in this article.

To guarantee the security of the data that is now residing in the cloud, it depends on the primary mechanisms of encryption of databases and generation of isolated databases for the customer. If one of the essential characteristics of the cloud were split off it is the sharing of resources. It is understandable that for many users there is the worry that their information can be shared in repositories with other companies, which could include competing companies. In these cases, we count on the creation of exclusive databases which only the authorized users can access.

Performance

The performance of a BI application can be affected by two factors: data processing and data transfer from the source to the destination. Data processing is done in two layers: database and application. In the cloud model, both layers can include better performance as compared to traditional installations. As far as databases go, the

information is distributed among various virtual hard drives with the cloud service provider and thus works in parallel during data access. In the case of the application layer, thanks to the presentations of elasticity of computing in the cloud, it is possible to provide computers with more speed and power, as much as to the processor as well as to the memory, depending on the workload of the BI application. The theme of performance during data transfer will be covered more later, in the section on transmission of high volumes of data.

Availability

One of the primary mechanisms to maintain high availability of applications including in the environment on site, is the redundancy of hardware, as much in active-active format (dual active) as active-passive. This plan, which will be explained later, incurs greater costs to companies, such that it has to invest practically double the resources. In the case of the cloud it is feasible to count on the same type of redundancy, but with reduced costs, based on that meanwhile the passive environment is not utilized or one of the active environments is not utilized to maximum capacity, they will not have to pay for the for the time it is not in use. In this way, they are able to capitalize on hardware for BI applications, but with much less investment that would be required in the on-site model. To achieve these savings it is necessary to establish the adequate configurations to provide the virtual machines from the service provider in adequate time, before the application stops responding.

Integration

Application integration in the cloud has been an important factor that has held back the migration to that business model. Having the newly offered applications as SaaS works to integrate with these legacy systems in the organizing is not an easy task, over all when it is required to exchange information in both senses.

Fortunately, in the case of BI solutions, the integration tasks are carried out with Extraction Transfer Load (ETL) tools. The complexity of using this type of software is very similar to that of onsite environment, such that while the controls are adequate for the database sources and the necessary communication channels are kept open, the transfer and load of data can be given in its native form. It should be stressed that this process ought to be accompanied by mechanisms of data encryption and data compression, as will be reviewed further ahead.

Transfer of Large Volumes of Data



The transfer of large volumes of data to the cloud is the primary hurdle to overcome in applying CloudBI in countries where internet connections come with minimal bandwidth. The traditional process for a solution of this type consists of data load in batch form to the extracted during the night by ETL programs. Depending on the size and needs of a business, the amount of data can be enormous by each load, up to a few gigabytes. One way we have tested with very good results is that of data compression before transfer through the channel of communication. Thanks to the raw data that is provided by the transactional databases are highly compressible, it is possible to get up to 90% decrease in size of the file that is to be transferred over the internet, cutting the time significantly that it would take to transfer the file, including over modest ADSL connections.

Intellego Financials

Intellego has been consistently growing for the last 13 years, our revenue for the year 2012 were \$131 million, and our estimation for the year 2013 is close to \$222 million. In the year 2009 NewYork-based Evercore, an important investment firm, acquired 30% of our company. Our financials are healthy and keeps growing every year.

	2009	2010	2011	2012	2013E	2014E	2015E	2016E	2017E
Net Revenue	30	36	84	131	222	253	293	332	379
Costs and Expenses	28	32	69	112	191	218	251	283	323
EBIT	2	4	15	19	32	35	42	49	55
EBIT %	6.6%	11.5%	17.5%	14.5%	14.3%	13.9%	14.4%	14.9%	14.6%
Interests, Others	0	-	2	5	7	4	2	2	1
Taxes	1	1	2	4	7	8	11	13	15
Net Income	1	3	10	10	18	23	29	35	40
Profit %	3.8%	7.7%	12.4%	8.0%	8.0%	9.1%	10.0%	10.5%	10.4%

