

MODIFIABLE RFP TEMPLATE & VENDOR Q&A RUBRIC | VNA-RFP-020 | Oracle Data, AI & Industry Accelerators

Request for Proposals (RFP): Oracle 23ai Document AI & Intelligent OCR: Extract PDFs & Invoices into APEX & Vector Search

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 Unstructured PDFs, Scanned TIFFs, Invoices, MSAs/SOWs & Lab Reports to OCI Document Understanding, Multimodal LLMs, Oracle 23ai AI Vector Search & APEX
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] Multi-Stage Ingestion & Layout-Aware OCR: Incoming documents from email inboxes, SFTP, or OCI Object Storage are processed through OCI Document Understanding / Veryfi / Nanonets and vision-language models using strict JSON Schema output enforcement.
- [REQ-ARCH-02] Unified Oracle 23ai Relational + JSON + AI Vector Storage: Instead of maintaining a separate vector database, extracted JSON payloads, `VECTOR` embeddings (`DBMS\_VECTOR`), and relational ledger rows live inside a single ACID-compliant Oracle Database 23ai instance.
- [REQ-ARCH-03] Automated Entity Resolution & PO/Contract Matching: Extracted line items are automatically cross-checked against existing purchase orders, contract rate cards, and master vendor tables using hybrid SQL + Vector similarity queries.
- [REQ-ARCH-04] Human-in-the-Loop APEX 24.2 Verification Workbench: Documents with confidence scores below 95% or math discrepancies route to a side-by-side APEX split-screen viewer highlighting the exact bounding box on the PDF next to the editable form field.

3. Component Conversion & Acceptance Matrix

Legacy Artifact / Workload	Required Target Architecture	Engineering Method & Acceptance Gate
Manual Email / PDF Invoice & Receipt Entry	Automated OCR Pipeline + 3-Way PO Match in Oracle 23ai	Straight-Through Processing + Bounding-Box Exception UI
Unindexed PDF Contract / MSA / SOW Repositories	Structured Renewal/Rate Tables + Oracle 23ai AI Vector Search	Clause Extraction + In-Database RAG (`DBMS_VECTOR`)
Siloed External Vector DBs & Python Glue Apps	Converged Oracle 23ai (Relational + JSON Duality + Vector)	Single Security, Backup & SQL Governance Plane
Private Equity / Financial PDF Trial Balance Packs	Automated Medallion Lakehouse Ingestion & Validation	Deterministic Cross-Foot & Balance Tie-Out Rules

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: Why store vector embeddings inside Oracle Database 23ai instead of a dedicated vector database? [Score: ____ / 10]

Reference Evaluation Benchmark: In enterprise applications, you almost never run a pure vector search in isolation; you need to filter by customer ID, effective date, department security role, and contract status at the same time. Oracle 23ai executes hybrid relational + JSON + vector similarity joins in a single SQL query with zero data duplication.

Vendor Question 2: How do you prevent LLM hallucinations on financial numbers and dates? [Score: ____ / 10]

Reference Evaluation Benchmark: Every extracted document passes through deterministic PL/SQL validation rules (line-item sum == invoice subtotal + tax == total, valid PO lookup, date range bounds). Any mathematical mismatch is flagged automatically in the APEX human-in-the-loop queue.

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

Reference Evaluation Benchmark: The PDF Solution Brief includes the Oracle 23ai Converged Document AI Reference Architecture, sample `DBMS\_VECTOR` hybrid SQL patterns, and our human-in-the-loop confidence routing matrix.

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%