

Secretary of State  
Proposed Technology Projects 2017-19

Name	Description	Division
Oregon Administrative Rules (OARD) Rewrite Phase 2	The purpose of the (OARD) Phase 2 project is enhancements including auto-filing, report on temporary filings, digital signatures, automated TRIM interface, and red line rule versioned text.	Archives
Archives Blue Book Website Migration	Migrate the Blue Book web sub-site to SharePoint. The goal of this project is to reduce amount of staff time involved in having to maintain 2 different sites using different content management tools.	Archives
Archives Subsite Migration & Modernization	<p>Fourth level and down: Migrate content from Dreamweaver, build/edit/format in SharePoint content management system.</p> <p>Note: For the Web Migration &amp; Modernization Project, only the top three levels of the Archives subsite were in scope. This project will benefit the agency and customers. Completion of the content migration will free up IT staff time and resources because the Web servers no longer need to be maintained. Completion benefits customers through delivering curated content and resolving the need for redirects that can slow page load times. Budget needs to cover Archives content managers and ISD Web team, including PM/content manager.</p>	Archives
Audits Report Search (ARS) Modernization	This project modernizes the Audits Division audit reports search. The goal of this project is to revamp the look and feel of the audits report search including retrieving the reports from the ERMS (TRIM) instead of a file server.	Audits
Audits MUNI Online Fee Payment and Online Report Filing	Implement ecommerce functionality that will allow local governments to pay annual audit report submission fees online and submit reports online. The goal of this project is to reduce the amount of BSD staff time required to enter fee payments and reports into the MUNI system and develop functionality that will allow municipalities or firms to file audit reports online.	Audits
Audits MUNI TRIM Interface	Modify MUNI to discontinue storing annual audit reports in the backend Oracle database. Interface MUNI with TRIM via WebDrawer to display audit reports to internal and external users. This project modernizes the Audits Division audit reports search. The goal of this project is to revamp the look and feel of the audits report search including retrieving the reports from the ERMS (TRIM) instead of a file server.	Audits
Procurement	The new eProcurement solution. A common eProcurement solution including 8 other state agencies to automate manual processes and improve reporting capabilities.	Business Services

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Name	Description	Division
DIS Reconciliation with BERI	Current process for DIS reconciliation for BERI transactions is manual. Need to automate this. Changes may be needed also in BERI for this and can be taken up only after BERI Modernization Project is completed.	Business Services
Identity Management (OIM) Enhancements	OIM Enhancements. OIM and the table maintenance application (LTM) have pending enhancement items.	Information Systems
Designer Replacement Evaluation	Evaluate data modeling tools to find replacement for Designer. Designer is not supported by vendor. Need to find a replacement tools for Data Modeling.	Information Systems
Migrating DIS (import and UI) to WebLogic 12C	Migrating DIS (import and UI) to WebLogic 12C.	Information Systems
Oregon Business Registry (OBR) -- Stabilization	One-stop shop for filing business registrations online. System stabilization; various fixes and enhancements.	Corporation
OBR -- Expansion	Remaining Reinstatements and Reactivations; complete the remaining 15 online reinstatement and reactivation filings;	Corporation
OBR -- Local Government Pilot	Pilot for implementation of business licensing for the City of Bend.	Corporation
OBR -- Expert Mode	Expert Mode (New Filings); enhancement to expedite business registry filings by "power users" such as law offices and service companies.	Corporation
OBR -- Existing Business Notification Opt-In	Allow business to opt-in to notification of changes and/or renewals.	Corporation
Oregon Business Registry -- CER/CBR Rewrite	Rewrite of Combined Employer's Registration module; redo the CER/Combined Business Contact Change module to use the refreshed look and feel and newer technologies	Corporation
OBR/BERI -- Enhanced Authentication -Security	Component elements include BERI event e-notices, postal address validation and OBR partner view-only queue.	Corporation

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OBR/BERI -- Certificates of Existence	Implement online Certificates of Existence. Includes redesign to a more usable user interface with updated branding for BERI Business Name Search. With NICUSA.	Corporation
BERI Modernization Project -- Phases 2 & 3	Replacement software to support internal business filings; the Business Entity Registration Information System is the "engine" that powers OBR. Phase 3, Standard Filings; and Phase 4, Extended Filings. (Phase 1, Application Administration, and Phase 2, New Filings, were completed and deployed to Production.)	Corporation
BERI Modernization Project -- Batch	Batch processing of business filings with improved user interface and automation.	Corporation
BERI Modernization Project -- Enhancements	Various enhancements such as online certificates.	Corporation
Uniform Commercial Code (UCC) -- "Strawman" Enhancements	Broaden existing functionality to help screen out bogus filers of tax liens.	Corporation
UCC -- Farm Products Functionality	Increase functionality and usability for internal users (aka filing officers) processing agricultural liens.	Corporation
UCC -- Work Queue	Design and implement queue interface for the administration of liens by internal users (aka filing officers).	Corporation
UCC -- Look-Up Table Maintenance	Add administrative functionality for maintenance of business data by internal users (aka application administrator).	Corporation
Notary -- Flagged Notary Name	Functionality to help further support the need to keep a disbarred Oregon notary public from renewing their commission.	Corporation
Notary -- Emails/Amendments-Renewals	Enhancements for the sending and storing of notification emails generated by the online application, and fixes involving changing and renewing notary commissions.	Corporation

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Name	Description	Division
Business Wizard Reinvention Project	Knowledge base to help entrepreneurs understand State of Oregon requirements for their planned businesses. With NICUSA.	Corporation
Online Notary Education	Expand web browser compatibility to Firefox for greater usability of this step-by-step web training app for potential Oregon notaries public.	Corporation
Complaints & Violations/others violations	The Complaints and Violations module of ORESTAR is only configured to track Contribution & Expenditure violations. The original design and structure was developed to track all cases in elections but was never configured or tested to track all cases. Configure ORESTAR to track other complaints and violations and make any coding changes required to do the tracking.	Elections
Oregon Centralized Voter Registration (OCVR) Modernization (Package 201)	Assessment and follow-on technical work to address changes/updates to OCVR.	Elections
OCVR Public Data	Inquiry, data subscription	Elections
Transition Abstracting	Abstracting is a process where all the votes are compiled by office, candidate and county and then generated into reports. Abstracting is also done for measures identifying the yes and no votes per county by measure. Currently abstracting is a manual process where counties submit their reports and then state elections staff compile them into a statewide report.	Elections
Transition Calendar	The Elections Division generates a calendar of election events every year. This calendar is generated utilizing information in the database to determine when events should be scheduled. Currently this functionality is in the old EBS system and will need to be transitioned to ORESTAR. A majority of the logic is done in PLSQL so it may be able to be reused if we write the code in PLSQL.	Elections
VIP/Drop Sites other election information	Enhanced drop site location info with VIP/Google.	Elections
Voter Registration Modernization	The Voter Registration Modernization project advances voter registration initiatives.	Elections

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Implement Oracle Enterprise Manager		Information Systems
Replace LTMs	Replace current LTMs. The LTM doesn't replicate sessions so an application user may be interrupted during the short switch-over window, and have to log out and start over.	Information Systems
Configure BigIP for redirect when servers down	iRule can be written, but we'll need application input and awareness. Application code will be required.	Information Systems
Console KVM	Replace the existing method with console KVM. New technology virtualizes KVM.	Information Systems
HP TRIM Upgrade	Upgrade HP TRIM from 7.3.4 to 8.3	Information Systems
NAS for Web and Intranet	NAS for web and intranet. Current NAS is over six years old.	Information Systems
Replace V440 Servers	Purchase new Sun Servers to replace the V440 Admin servers. This will depend on when the V440 reaches end of life.	Information Systems
Mobility Device Management (MDM)	Gain control and visibility of mobile devices.	Information Systems
Novell to Active Directory	Migrate the current Novell eDirectory file system to Microsoft Active Directory	Information Systems
Centralize VMs	Manage all virtual computers at the server level. This provides stability and security for the VMs	Information Systems
CM for Hardware	We need to develop configuration management for infrastructure hardware.	Information Systems

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JIRA Hosting	JIRA is currently hosted offsite with Synergy.	Information Systems
Keepin' in PC	We currently have 181 computers in the agency that are more than three years old. This project will look into replacing all of the aged PCs and laptops in the agency.	Information Systems
BAE SilverSky Email Migration		Information Systems
DOTNEW	This project tackles the issue of segmenting our infrastructure.	Information Systems
Migrate the Oracle Databases to New Servers		Information Systems
TeamMate V12 Upgrade	Upgrade TeamMate to V11.1 or 11.2	Information Systems

UPDATED OTHER FUNDS ENDING BALANCES FOR THE 2015-17 & 2017-19 BIENNIA

Agency: Secretary of State's Office - Agency 16500  
 Contact Person (Name & Phone #): Jeff Morgan 503-986-2239

(a) Other Fund Type	(b) Program Area (SCR)	(c) Treasury Fund #/Name	(d) Category/Description	(e) Constitutional and/or Statutory reference	(f) 2015-17 Ending Balance		(g) 2017-19 Ending Balance		(i) Comments
					In LAB	Revised	In CSL	Revised	
Other Fund Limited-Administration	001-00-00-0000	1650000401- Sec. of State General Fund	Operations	ORS 177.010; ORS 177.140; and ORS 177.200	2,834,457	1,877,614	2,358,877	1,544,025	Revisions are based on updated actual expenditure data through January 2017 and trued up forecasting for the remainder of the biennium. Balance assumes a 2 month operating costs will be retained. 17-19 Est. 2 month Operating cost is \$1.47 million. 17-19 adjusted costs factors \$250,000 new IT Security Enhancements Policy Package
Other Fund Limited Election	002-00-00-0000	1650000401- Sec. of State General Fund	Operations	ORS 246.260; and 2002 Help America Vote Act (HAVA)	42	27,880	(41,574)	(41,323)	
Other Fund - Nonbudgeted Audits Division Muni	007-00-00-0000	1650000401- Sec. of State General Fund	Trust Fund	ORS 297.405-297.555	0	289,209	0	289,209	Municipal Audit Program. This is a non-budgeted Fund.
Other Fund - Limited Audits Division	007-00-00-0000	1650000401- Sec. of State General Fund	Operations	Oregon Constitution, Article VI, Section 2, and ORS 297.010-297.990	2,393,105	3,477,916	2,869,601	2,412,003	Funding is primarily through assessments. Based on guidance from OAM 30.20.00 PR in the event it appears assessments will exceed requirements, assessments will be reduced and/or excess collections will be refunded. 17-19 Est. 2 mos Operating Cost is \$1.78million. Revisions are based on updated actual expenditure data through January 2016 and trued up forecasting for the remainder of the biennium. 17-19 adjusted costs factors \$408,000 new IT Security Audit team.
Other Fund - Limited Archives Division	012-00-00-0000	1650000401- Sec. of State General Fund	Operations	ORS 183.355; ORS 183.360; ORS 192.001-192.170; ORS 357.805-357.895; ORS 171.407, ORS 171.420-171.430; ORS 177.120; and ORS 183.325-183.362.	764,313	1,270,575	1,310,153	675,335	Funding is primarily through assessments. Based on guidance from OAM 30.20.00 PR in the event it appears assessments will exceed requirements, assessments will be reduced and/or excess collections will be refunded. Revisions are based on updated actual expenditure data through January 2016 and trued up forecasting for the remainder of the biennium 17-19. Est. 2 mos Operating Cost is \$627k.
Other Fund - Limited Corporation Division	036-00-00-000	1650000401- Sec. of State General Fund	Operations	ORS 56; ORS 58; ORS 60; ORS 62; ORS 63; ORS 65; ORS 67; ORS 68; ORS 79; ORS 80; ORS 87; ORS 128; ORS 194; ORS 554; ORS 647; and ORS 648	2,735,400	1,151,451	255,745	334,332	Revisions are based on updated actual expenditure data through January 2016 and trued up forecasting for the remainder of the biennium. 17-19 Estimated 2 month Operating Cost is \$815k.
					8,727,317	8,094,644	6,752,802	5,213,581	

**Objective:** Provide updated Other Funds ending balance information for potential use in the development of the 2017-19 legislatively adopted budget.

**Instructions:**

- Column (a): Select one of the following: Limited, Nonlimited, Capital Improvement, Capital Construction, Debt Service, or Debt Service Nonlimited.
- Column (b): Select the appropriate Summary Cross Reference number and name from those included in the 2015-17 Legislatively Approved Budget. If this changed from previous structures, please note the change in Comments (Column (j)).
- Column (c): Select the appropriate, statutorily established Treasury Fund name and account number where fund balance resides. If the official fund or account name is different than the commonly used reference, please include the working title of the fund or account in Column (j).
- Column (d): Select one of the following: Operations, Trust Fund, Grant Fund, Investment Pool, Loan Program, or Other. If "Other", please specify. If "Operations", in Comments (Column (j)), specify the number of months the reserve covers, the methodology used to determine the reserve amount, and the minimum need for cash flow purposes.
- Column (e): List the Constitutional, Federal, or Statutory references that establishes or limits the use of the funds.
- Columns (f) and (h): Use the appropriate, audited amount from the 2015-17 Legislatively Approved Budget and the 2017-19 Current Service Level as of the Agency Request Budget.
- Columns (g) and (i): Provide updated ending balances based on revised expenditure patterns or revenue trends. Do not include adjustments for reduction options that have been submitted unless the options have already been implemented as part of the 2015-17 General Fund approved budget or otherwise incorporated in the 2015-17 LAB. The revised column (i) can be used for the balances included in the Governor's budget if available at the time of submittal. Provide a description of revisions in Comments (Column (j)).
- Column (j): Please note any reasons for significant changes in balances previously reported during the 2015 session.

Additional Materials: If the revised ending balances (Columns (g) or (i)) reflect a variance greater than 5% or \$50,000 from the amounts included in the LAB (Columns (f) or (h)), attach supporting memo or spreadsheet to detail the revised forecast.