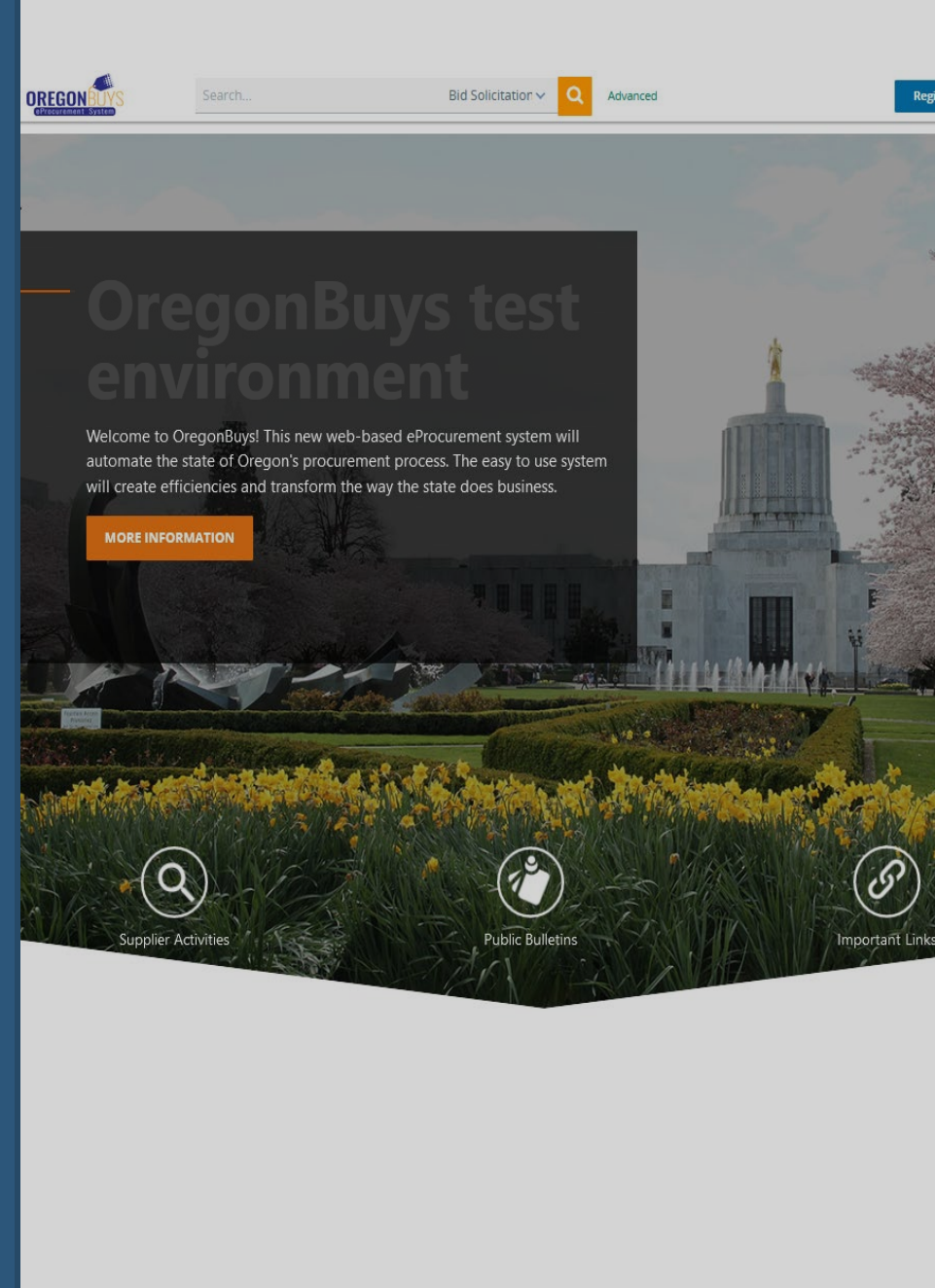# OregonBuys Overview

JOINT LEGISLATIVE COMMITTEE ON INFORMATION MANAGEMENT AND TECHNOLOGY

MAY 5, 2021

Debbie Dennis, Chief Procurement Officer
Ginny Beckwith, OregonBuys Project Director
DAS Procurement Services

PROJECT SCOPE

Periscope Holdings ePro (OregonBuys) Solution and Related Services

The solution automates procurement processes using web-based applications. It's technology-enabled solution that allows users to procure goods and services at the best value. This includes but is not limited to:

- Solicitation creation, advertisement, modification, offer receipt, evaluation and award
- Approval paths (internal and external)
- Contract administration (record keeping, invoice processing, contract amendments, & contract close out)
- Standardized and ad hoc reporting capability (i.e., spend analysis, critical goods and services turnaround times, cyclical purchase data, etc.)
- Statewide price agreement repository
- Supplier registration
- Integration with state systems – R*STARS, TEAMS, COBID and NIC-USA Payment Portal for vendor collected administrative fee processing

SOLUTION MODULES

eProcurement					
End-to-end Procurement Start to finish automation from request through sourcing receipt and payment	**Price Agreement Catalog** Online shopping from statewide price agreements	**Vendor Access** Self service tools and information for vendors	**Sourcing** Posting of solicitations, bid submission and evaluations, notice of award	**Payment** Electronic receiving and invoice processing which feeds to R*STARS	**Spend & Data Analysis** Access to comprehensive data to enable strategic sourcing

RELATED SERVICES

- Project management and reporting

- Core user enablement

- Training and support – virtual for Phase 1

- Change leadership

- Hosted and punch-out vendor catalogs within Marketplace

- Technical and functional support for agency users, Oregon Cooperative Procurement Program (ORCPP) members and vendors with Tier 1, 2 and 3 issues

- Strategic Sourcing –spend analysis

PROJECT TIMELINE AND SCHEDULE

PHASE 1
Now – July 1, 2021

REPLACE THE OREGON PROCUREMENT INFORMATION NETWORK (ORPIN)
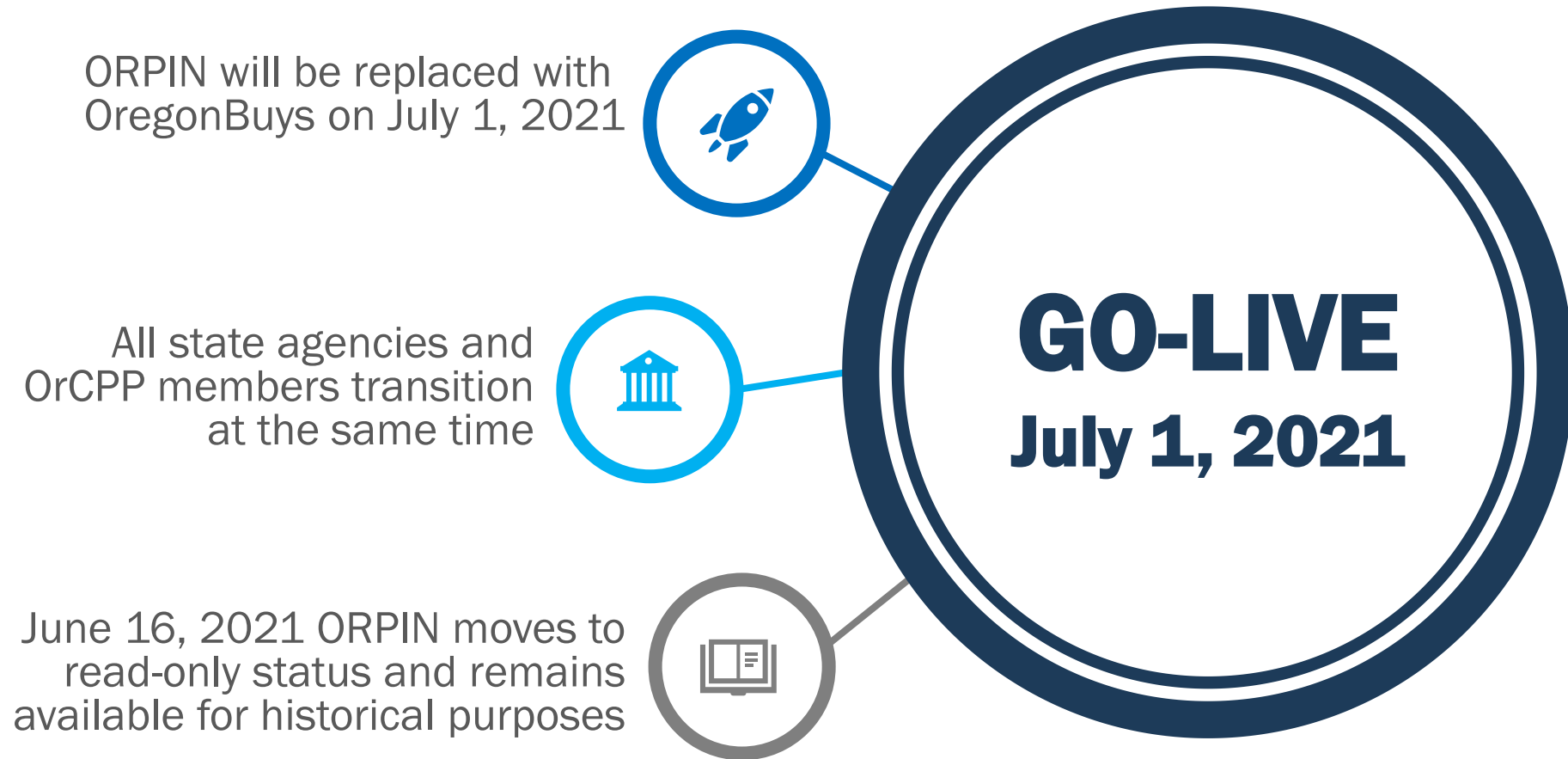
ADDS MARKETPLACE FOR BROWSING

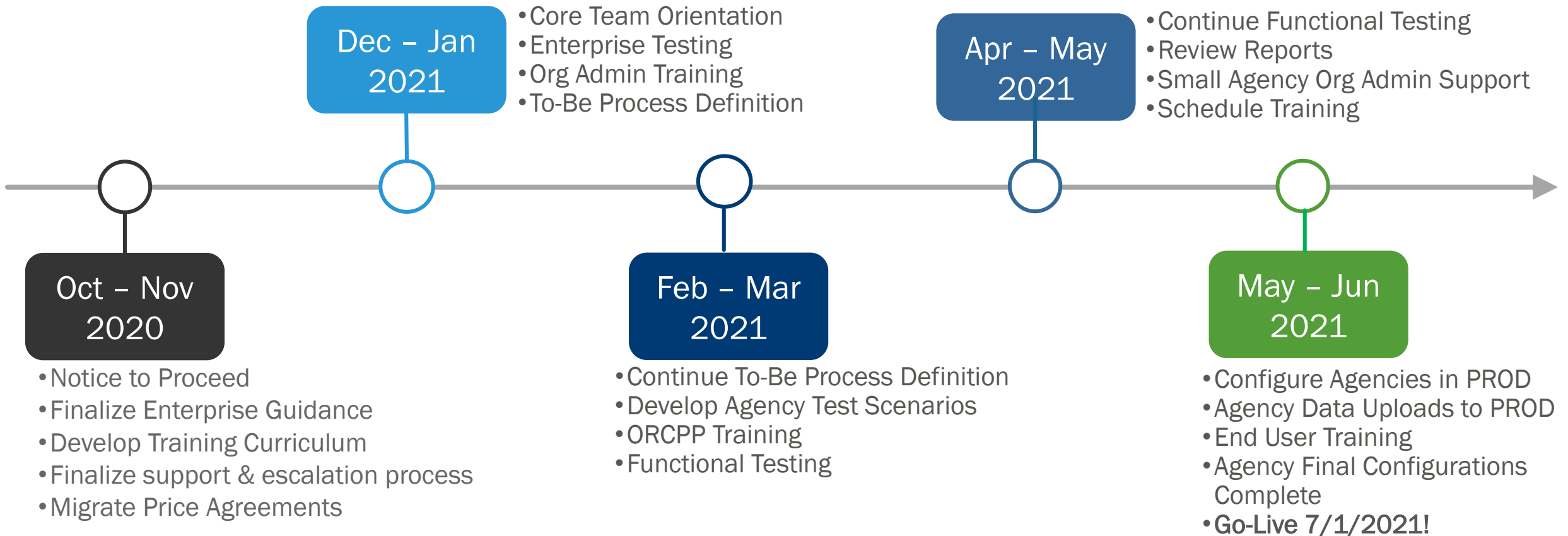## PHASE 2
August 2021 – June 2023

ADDED PROCURE-TO-PAY FUNCTIONALITY

LAUNCHES TO AGENCIES IN 3 WAVES LASTING 8-MONTHS EACH

ORPIN REPLACEMENT STATUS
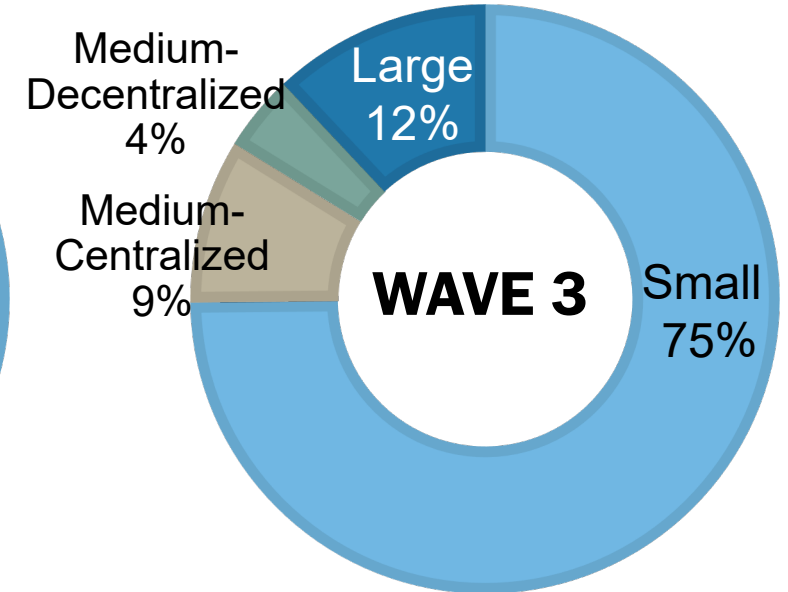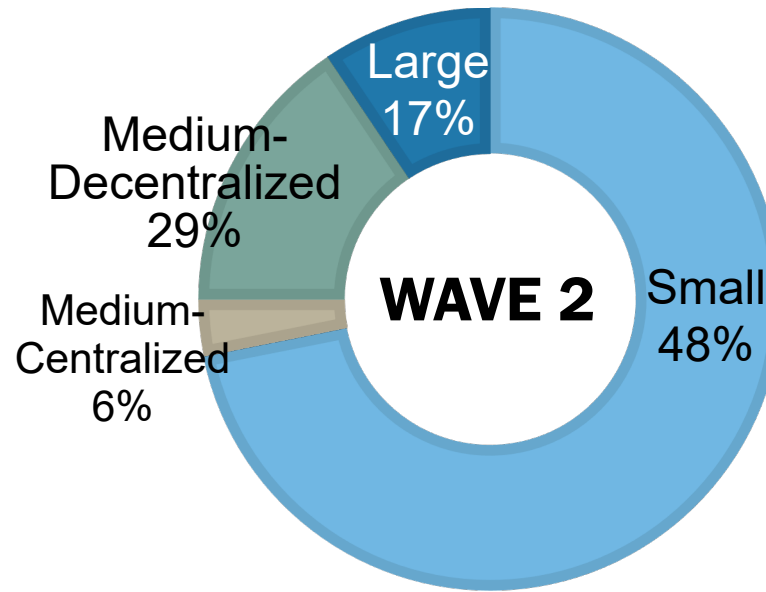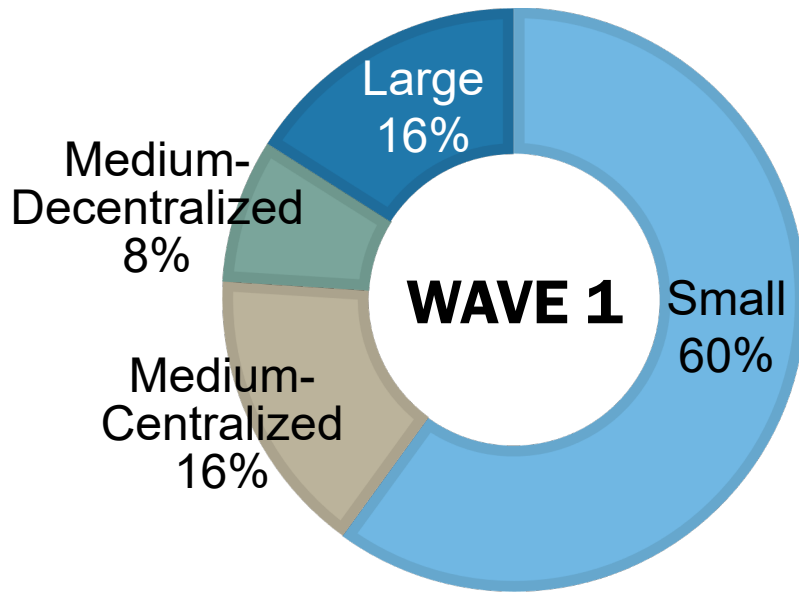
ORPIN will be replaced with OregonBuys on July 1, 2021

All state agencies and OrCPP members transition at the same time

June 16, 2021 ORPIN moves to read-only status and remains available for historical purposes

GO-LIVE
July 1, 2021

PHASE 1 TIMELINE: OREGON PROCUREMENT INFORMATION NETWORK (ORPIN) REPLACEMENT

Dec – Jan 2021
- Core Team Orientation
- Enterprise Testing
- Org Admin Training
- To-Be Process Definition

Apr – May 2021
- Continue Functional Testing
- Review Reports
- Small Agency Org Admin Support
- Schedule Training

Oct – Nov 2020
- Notice to Proceed
- Finalize Enterprise Guidance
- Develop Training Curriculum
- Finalize support & escalation process
- Migrate Price Agreements

Feb – Mar 2021
- Continue To-Be Process Definition
- Develop Agency Test Scenarios
- ORCPP Training
- Functional Testing

May – Jun 2021
- Configure Agencies in PROD
- Agency Data Uploads to PROD
- End User Training
- Agency Final Configurations Complete
- **Go-Live 7/1/2021!**

PHASE 2 WAVES - BREAKDOWN BY AGENCY SIZE

WAVE 1
- Large 16%
- Medium-Decentralized 8%
- Medium-Centralized 16%
- Small 60%

WAVE 2
- Large 17%
- Medium-Decentralized 29%
- Medium-Centralized 6%
- Small 48%

WAVE 3
- Medium-Decentralized 4%
- Large 12%
- Medium-Centralized 9%
- Small 75%

PHASE 2 TIMELINE: PROCURE-TO-PAY WAVE SCHEDULE

Wave 1
Aug 2021 - Mar 2022

Wave 2
Apr 2022 - Nov 2022

Wave 3
Nov 2022 - June 2023
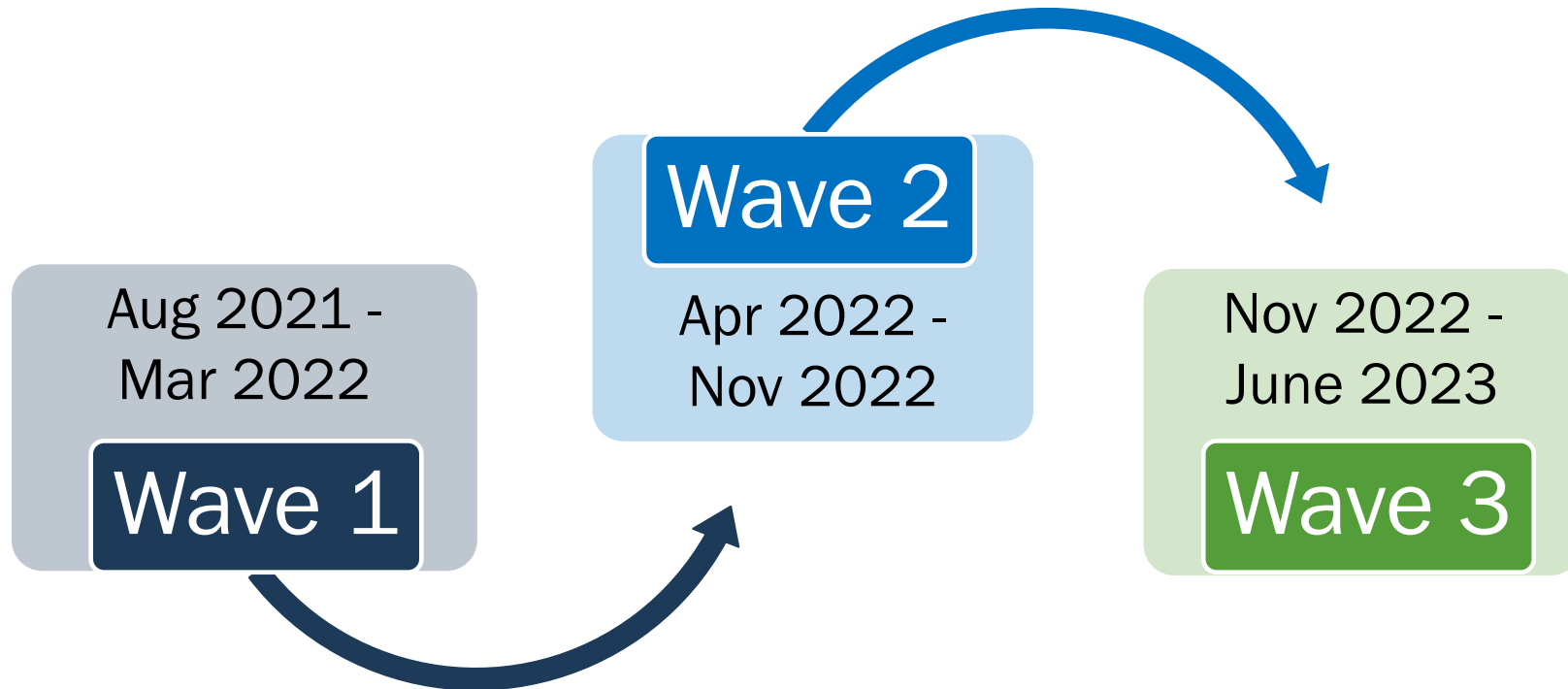
PROCURE-TO-PAY DEPLOYMENT AGENCY WAVE EXAMPLE TIMELINE

Process Design

Month 2-7
- Core Team Orientation
- "To Be" Process Design
- Data Collection

Training

Month 2-7
- Schedule & curriculum
- Identify Attendees / Registrations
- Training Sessions
- Evaluations

Agency Planning

Month 1-2
- Review End to End Deployment Plan
- Kickoff and Demo

Testing

Month 2-7
- Review Test Plan
- Develop Test Scenarios
- Support Agency Testing

Go-live

Month 8
- Go-Live Plan
- Configuration Checklist
- Final Configuration
- Support

OUTREACH

In any given month, members of the project team are engaged with the following stakeholders on project activities and targeted messaging:

- Small agencies
- Semi-independent Boards and Agencies (SIBA)
- Governing bodies – Advisory Council, Executive Steering Committee
- Legislative Fiscal Office
- Designated Procurement Officers (DPO)
- Core team agencies (41 large, medium and some small-sized)
- Administrative Services Business Directors (ABSD)
- Core team agency organization administrators
- Oregon Cooperative Procurement Program members (OrCPP)
- ODOT TEAMS (interface coordination)

- R*STARS (interface coordination)
- COBID (interface coordination)
- Change Management Professional Network
- DAS Procurement Services
- State Procurement Professionals
- Suppliers and vendors
- Project sponsors
- SoS and Forestry (current system users)
- DAS Enterprise Information Services
- Legislative partners

2019 – 2021 PROJECT BUDGET

	Policy Option Package	Actuals to Date
Personal Services (5 positions)	$1,042,173	$990,118
Professional Services		
Periscope Fees	$7,510,000	$6,121,056
iQMS	$800,000	$322,598
TOTAL	**$9,352,173**	**$7,433,772**

INDEPENDENT QUALITY MANAGEMENT SERVICES (iQMS)
CSG GOVERNMENT SOLUTIONS PROJECT ASSESSMENT MARCH 2021

Overall Project Risk Rating
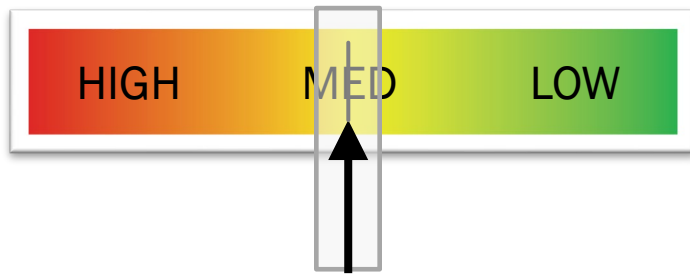
The project is perceived to be operating at a medium risk level

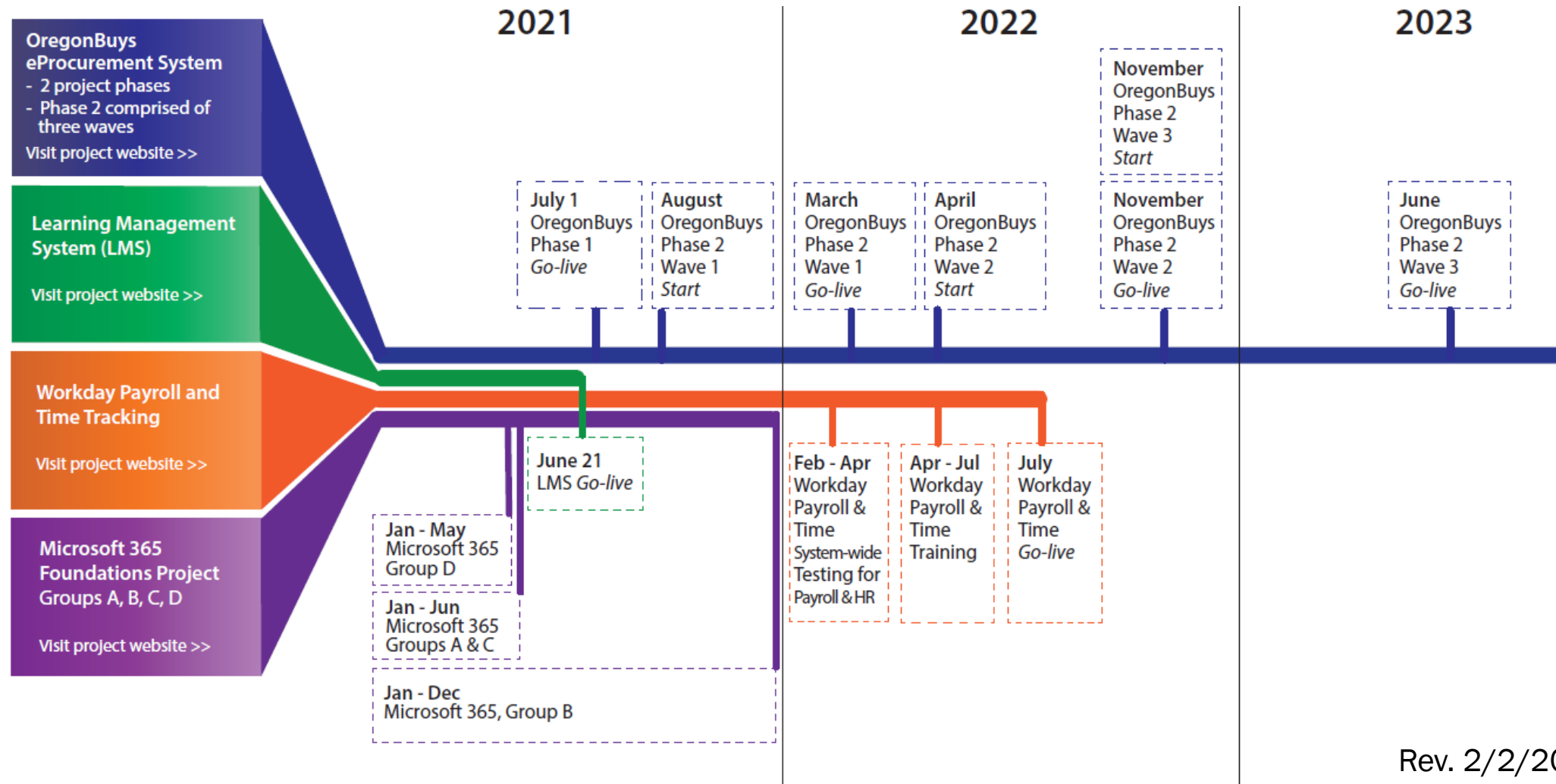| Program status indicators	
LOW	On-track, only minor issues
MED	One or more areas of concern
HIGH	Significant issues that limit the success of the project

Project on track to achieve Phase 1 Go-live milestone July 1, 2021:

- Budget is on track and management processes being finalized
- Schedule management processes improving
- No high-risk status areas
- Project is taking action to address key medium risks:
  - Schedule management process
    Developed and implemented processes to measure planned to actual schedule performance to minimize schedule instability
  - Budget Management Process
    Developed and implemented processes to provide cost expectations and clarify VCAF revenue reporting
  - Maintenance & Operations Plan (M&O)
    Project resource identified to develop system M&O plan and address operational readiness

RISKS AND CHALLENGES

- Supplier registration, while on the rise, there are still a lot of agency specific suppliers who are not registered. Periscope, the project team and agencies are doing significant outreach.

- Virtual training and the shift to holding remote only sessions is a challenge with the rollout of this new system.
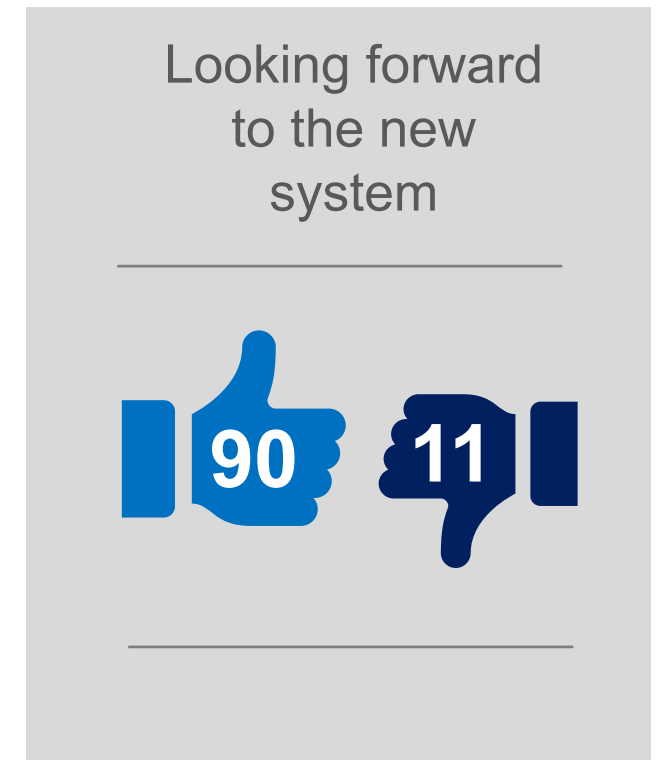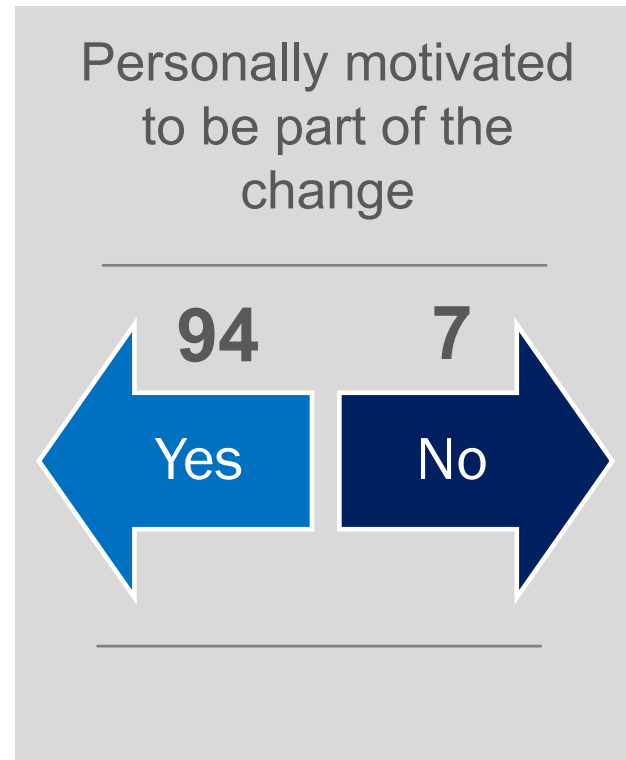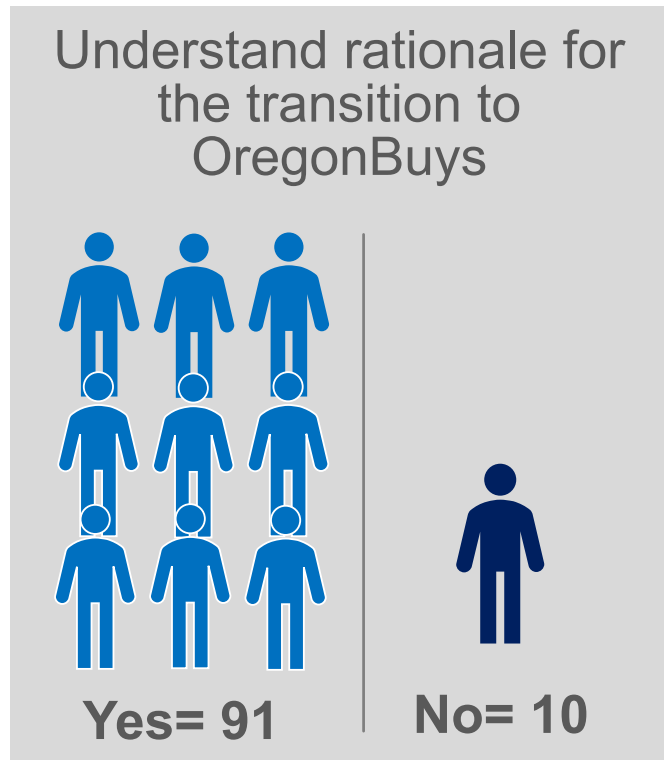
DAS ENTERPRISE PROJECTS HIGH LEVEL TIMELINE

2021

2022

2023

OregonBuys eProcurement System
- 2 project phases
- Phase 2 comprised of three waves

Visit project website >>

Learning Management System (LMS)

Visit project website >>

Workday Payroll and Time Tracking

Visit project website >>

Microsoft 365 Foundations Project
Groups A, B, C, D

Visit project website >>

July 1
OregonBuys
Phase 1
Go-live

August
OregonBuys
Phase 2
Wave 1
Start

March
OregonBuys
Phase 2
Wave 1
Go-live

April
OregonBuys
Phase 2
Wave 2
Start

November
OregonBuys
Phase 2
Wave 3
Start

November
OregonBuys
Phase 2
Wave 2
Go-live

June
OregonBuys
Phase 2
Wave 3
Go-live

June 21
LMS *Go-live*

Jan - May
Microsoft 365
Group D

Jan - Jun
Microsoft 365
Groups A & C

Jan - Dec
Microsoft 365, Group B

Feb - Apr
Workday
Payroll &
Time
System-wide
Testing for
Payroll & HR

Apr - Jul
Workday
Payroll &
Time
Training

July
Workday
Payroll &
Time
Go-live

Rev. 2/2/2021

PRELIMINARY COMMUNICATIONS SURVEY RESULTS

101 agency procurement staff responded:

Understand rationale for the transition to OregonBuys

Yes= 91   No= 10

Personally motivated to be part of the change

94   7

Yes   No

Looking forward to the new system

90   11

Thank You

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