**How to manage common configuration vs. agency options**

It is expected that within the chosen solution there will be some items that can be configured to agency needs and others that must be specified at the state level to ensure consistent reporting and usage. This group will meet to identify items that must be consistent at the state level and propose usage options.

Expertise needed

Procurement, finance, and IT specialists familiar with ORPIN and R\*STARS data entry and reporting requirements

Participants

Mark Hubbard, Finance, ODF

Shannon Rand, Procurement, ODF

Brent Grimsrud, IT, ODF

Jennifer Bittel, Procurement, DHS/OHA

Jason Robinson, Finance, DCBS

Jeff Bustos, IT, SoS

Nicole Brazeal, ORPIN administrator, DAS - Lead

Joanne Barnhart, Business analyst, ODF

TBD, ODE

Worklist

* Review the PMAT brainstormed list of configuration options to be covered to determine if it is complete and accurate, add or remove items as needed
* Review any existing documentation (ORPIN, etc.) that may provide guidance
* Propose statewide consistent usage for each configuration option
* Present suggested usage to OregonBuys Steering Committee for review and ratification

Time commitment

Initial: Four 2 hour meetings

Meeting scheduled July 30

Priority

High, this information is needed soon for ODF implementation activities

Due date

Preliminary results approved by steering committee: August 31, 2016

Complete results later after OregonBuys product details are known

Task Notes

The following are some possible areas where common configuration will be needed.

* Reports
* Workflow – need common workflow for measuring how long to complete a task
* Usage of fields
* Field names
* Field lists
* Security, e.g. how often passwords are changed, when users are locked out, etc.

**Updates to Rules (legislative directives for application use)**

It is necessary to identify what rules or policies will need to be modified to allow agencies to use the OregonBuys application.

Participants

Bob Baxter, Procurement, OJD

Brenda Brown, Procurement, DHS/OHA

Ginny Beckwith, DAS Procurement

Joanne Barnhart, Business Analyst, ODF - lead

Worklist

* Identify what will need to be modified. Possible items include:
	+ Rules,
	+ Contracts,
	+ Policies,
	+ Procedures,
	+ Practices, etc.
* Identify when requests to make changes need to be submitted (timeline)
* Present modifications to Bret West and Debbie Dennis (DAS)
* Follow up with DAS to ensure modifications are made

Time commitment

Initial: To be determined by participants

Ongoing: Potential for later work on rules and other things depending on which product is selected. Also, individual agencies will need to review their own internal policies as they implement the solution.

Priority

High, this information is needed for ForestryBuys go live

Due date

March 1, 2017

Task Notes

* Anything else besides rules, e.g. contracts modified, cancelled, DAS policies, DAS procedures, DAS oversight processes and practices?

**Interfaces**

It is within the scope of OregonBuys and ForestryBuys to construct interfaces to ORPIN, R\*STARS/ADPICS, and COBID. An ideal solution would be a single interface for each application that all agencies can use. To accomplish that goal it is necessary to identify all of the fields required.

Expertise needed

Procurement, finance, and IT specialists familiar with ORPIN, R\*STARS and COBID data.

Participants

Mark Hubbard, Finance, ODF

Nicole Brazeal, ORPIN administrator, DAS - Lead

Michael Makelacy, (R\*STARS), DAS

Alan Park, (R\*STARS), DAS

Tomas Flores, Finance, ODE

Joanne Barnhart, Business Analyst, ODF

Steve Bergman, Finance, DOR

Chris Bui, Finance, DAS

Worklist

* Identify data elements required for the four initial interfaces (R\*STARS, ADPICS, COBID, ORPIN)

Time commitment

Initial: Four 2 hour meetings

Ongoing: Availability as a resource throughout Forestry implementation

Meeting scheduled July 19

Priority

High, this information is needed for ODF implementation activities

Due date

September 30, 2016

Task Notes

* Common interfaces (SFMS, etc.)
* Start preliminary definition work for common interfaces ASAP, so as not to slow up ODF

Not included in scope of work

* Unique agency interface needs

**OregonBuys Implementation Toolkit**

A website containing documents to support agency implementation.

Expertise needed

Public Information Officer

Collaborating agency planning to implement (SoS, Forestry, etc.)

Non-OregonBuys collaborating agency planning to implement (OYA, etc.)

OregonBuys project manager

Web site administrator

Participants

Nicole Brazeal, Web site administrator, DAS

John Cuddy, contractor

Sarah Roth, Procurement, SoS - lead

Dave Whitbeck, Project Manager, ForestryBuys

Christina Long, IT, DHS/OHA

Ken Armstrong, PIO, ODF

Mark Hubbard, Finance, ODF

Toby Giddings, Contract Administrator, DAS

OregonBuys collaborating agency

Outside agency considering implementation

Change Management Contractor

Worklist

* POP Documents
* Stage Gate documents
* Project introduction slideshows and documents
* Lessons learned, decision logs, and other documents pertaining to implementation
* Agency contacts for advice and implementation coaching
* Design the website to enhance usability and value for implementing and other interested agencies

Time commitment

Initial: Three 2-hour meetings

Ongoing:

Priority

High, the types of information to be included should be identified soon to ensure valuable information is captured during the ODF implementation

Due date

Initial Site: September 30, 2016

Task Notes

* Develop format and content so we can be sure to capture docs to include from ODF implementation
* Include document templates, e.g. charter, business case

**Define an ongoing governance structure after OregonBuys Implementation**

We must establish a governance structure for guiding decisions about system functionality and maintenance. Along with this, we need to appoint a single point of contact to serve as an overarching system administrator who will collect and report system issues from all agencies, coordinate patches and other updates with the vendor, and resolve issues or mandates as they arise. Although the system administrator will be the sole contact for the vendor, they will not or make decisions or operate on their own. The governance structure will outline parties to be consulted for decisions before system changes are made. (Possible resources for this could include the existing Steering or Executive Sponsor Committees, augmented by representatives from agencies that implement beyond the original nine agencies.)

This need differs from the issue of ‘common configuration’ in that the system administration and governance structure will continue to operate even after agencies complete their implementation projects. In fact, any Agency vs. Enterprise configuration questions that arise after the Forestry implementation is complete will fall under the guidance of this governance structure as well.

Expertise needed

DAS procurement

Office of CIO

Agencies that have implemented (will implement)

Subset of OregonBuys Steering Committee

PMAT expertise

Participants

Nicole Brazeal, ORPIN administrator, DAS

PMAT Committee – Dave Whitbeck - lead

Subset of OregonBuys Steering Committee

Lill Gray, Procurement, ODE

Dan Miller, IT, DOR

Toby Giddings, DAS Procurement

Ginny Beckwith, DAS Procurement

Terrence Woods, Office of CIO

Representative from Executive Sponsors Committee

Worklist

* Group formed for preliminary work to deal with cross-cutting issues that arise after the OregonBuys contract is signed
* Other ongoing governance to be decided later

Time commitment

Initial: Two or three 2 hour meetings

Ongoing:

Priority

High

Due date

September 30, 2016 (to be prepared for governance needs soon after signing of OregonBuys contract)

Task Notes

* Reporting bugs, applying patches, common configuration, etc.
* Vendor relationship
* Define “Oregon enhancements” to request of the vendor
* What other post OregonBuys activities need to be “Governed”? Do we keep Sponsors, Steering, and PMAT functioning for the foreseeable future?