



OREGONBUYS

MONTHLY FORUM

OCTOBER 10, 2019

AGENDA

- OregonBuys Enterprise overview
- Project priorities and objectives
- Project scope and timeline
- Current status
- OregonBuys Marketplace demo
- Monthly topics
 - ✓ User roles and terminology
 - ✓ How to conduct process inventory
- Questions and feedback

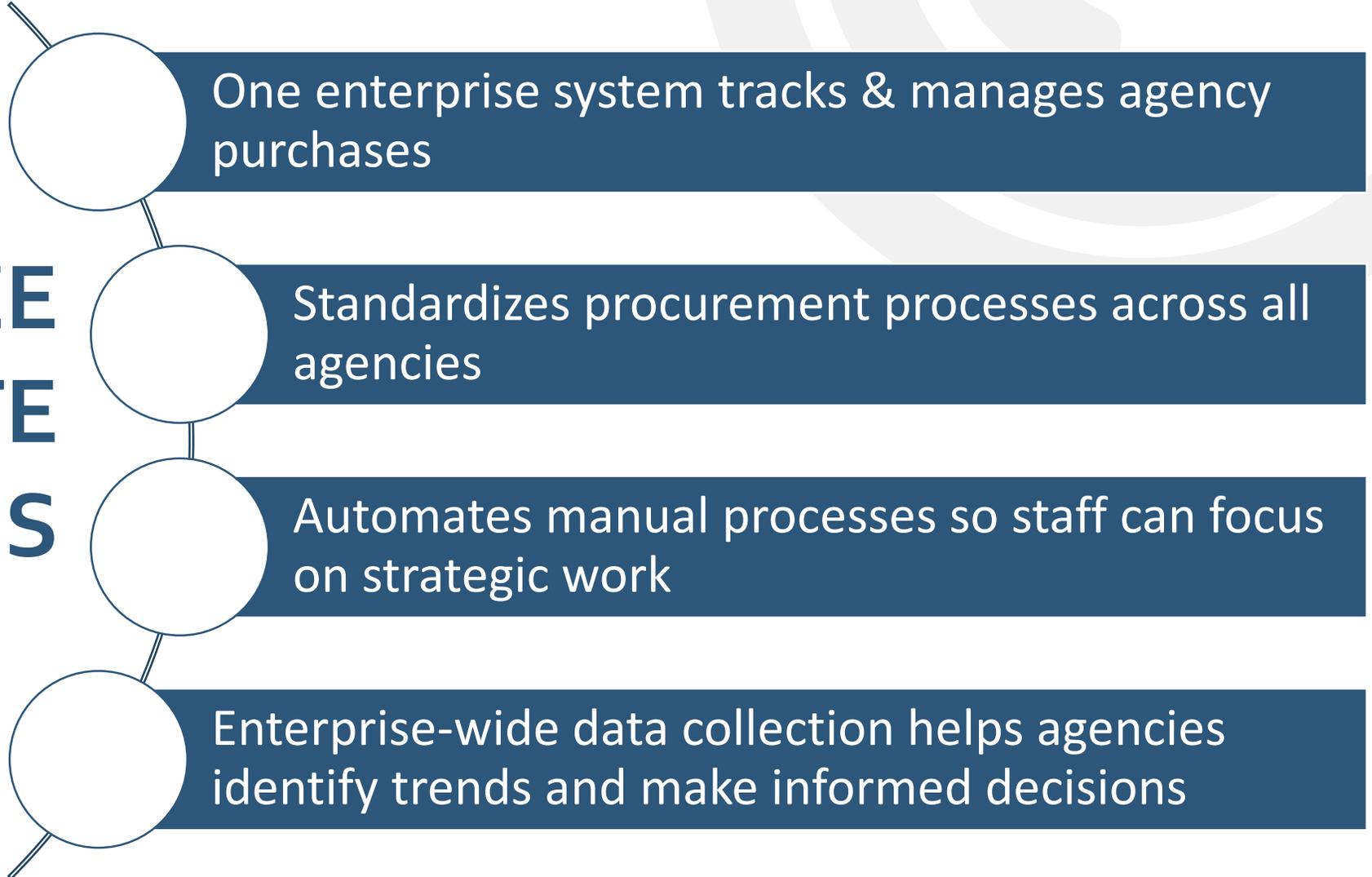
WHY OREGONBUYS?



- The state has unified procurement rules, but lacks a modern IT system to standardize and track procurements
- Procurement processes vary by agency, are manual in nature, and are labor intensive
- Manual processes limit the state's ability to track and manage spend
- Procurement makes up nearly 10% of Oregon's all funds budget and represents \$8 billion in biennial spending.

ALIGNMENT WITH STRATEGIC PRIORITIES

OPTIMIZE STATE RESOURCES



PROJECT PURPOSE & OBJECTIVES



- All state agencies adopt OregonBuys as the state's eProcurement system of record
- Standardize and automate state of Oregon procure-to-pay process and provide more transparency and reporting capabilities on statewide spend
- Strategic sourcing plans are in place for how the state will identify strategic sourcing opportunities to optimize spend
- Increased competition for state contracts results in better contract terms
- Decommission ORPIN and other procurement-related shadow systems across agencies

PROGRESS TO DATE



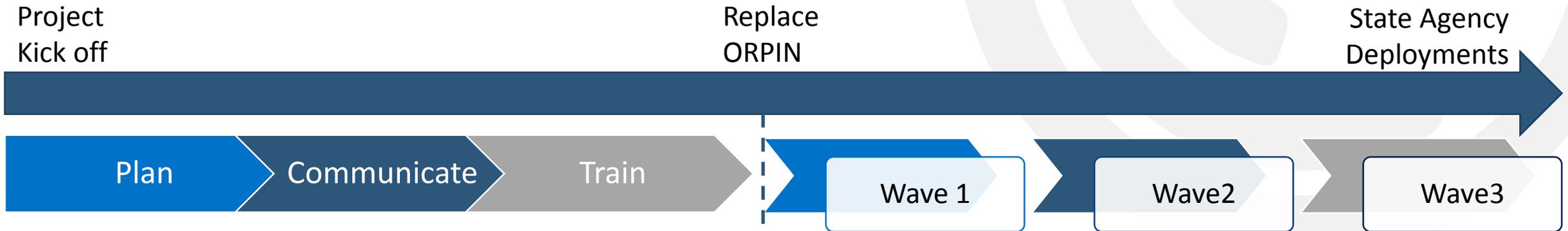
- Software as a Service (SaaS) solution provided by Periscope Holdings
- Partnered with Periscope on OregonBuys Instance project initiated January 2018; Go-live February 2019
- Currently in use at Secretary of State and Department of Forestry
- OregonBuys interfaces with R*STARS and COBID

PROJECT SCOPE



- Replace ORPIN with OregonBuys as the eProcurement solution of record for all state agencies
- Integrations with R*STARS, TEAMS, NIC-USA payment portal, COBID; future planned integrations to identity management and enterprise data warehouse
- Adopt the OregonBuys procure-to-pay process across all state agencies

HIGH LEVEL PROJECT TIMELINE



Phase 1 Priority – Replace ORPIN

- Enhance existing OregonBuys configurations, if need be
- Develop training materials
- Conduct vendor and ORCPP Outreach
- Upload price agreements into OregonBuys
- Replace ORPIN
- Communicate throughout the project

Phase 2 Priority – Onboard State Agencies

- Each on-boarding wave is six months long
 - Each wave contains multiple phases
 - Plan, configure, test, train, go-live
 - 3 deployment waves planned for agencies
- Each wave contains a combination of large and small agencies

CURRENT STATUS

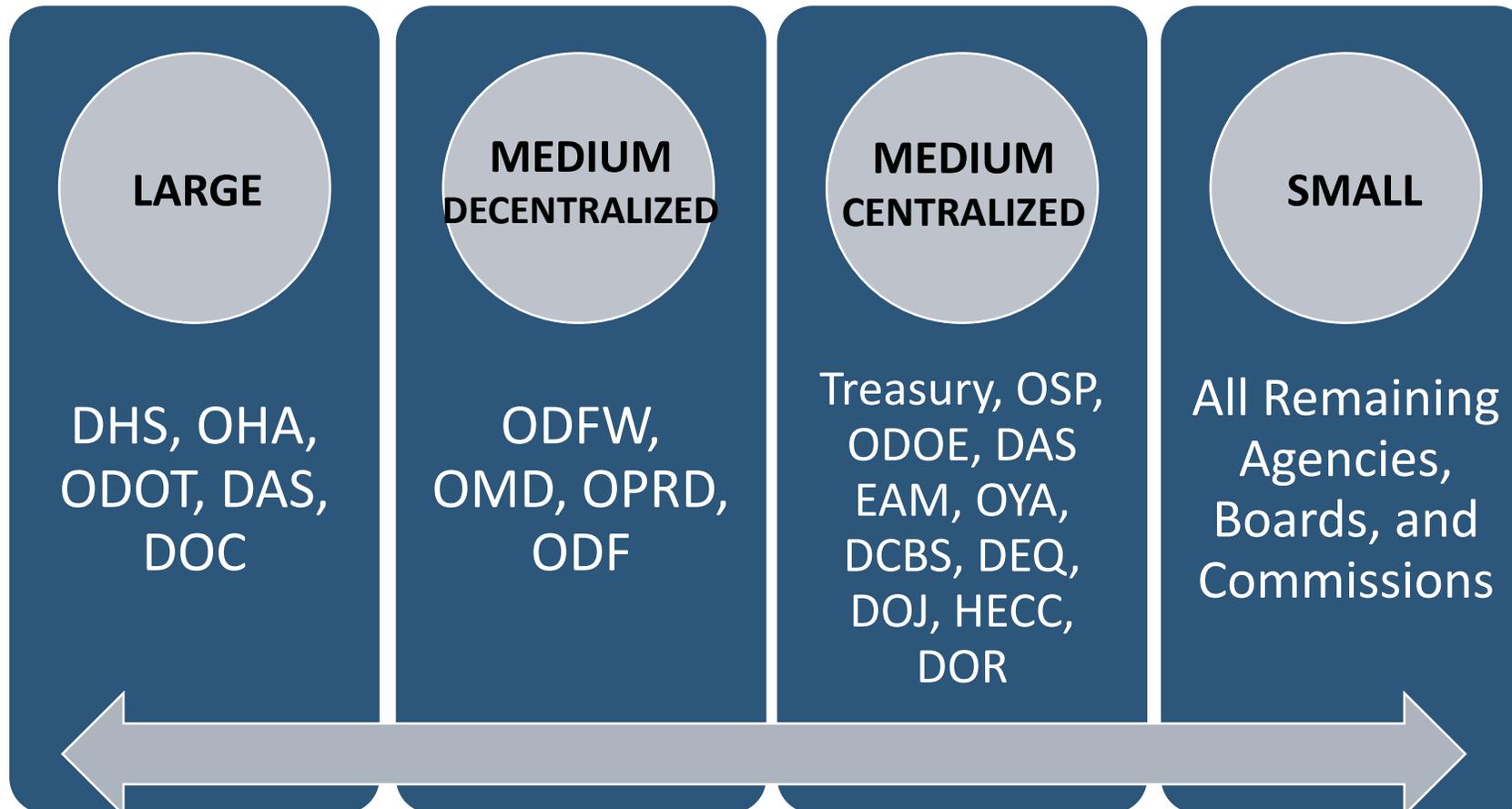
PLANNING



- Business process analysis – ORPIN replacement
 - Step 1: Business process inventory (Completed)
 - Step 2: Business process design & prototyping/scenarios (Completed)
 - Step 3: Hands-on walk through of business prototypes/scenarios (In Progress)
- Using data gathered through the Procurement Survey for downstream planning
- Reviewing plans associated with ORPIN Replacement
- Reviewing security requirements and expectations with EIS and ESO
- Baselining the timeline — October/November

PROCUREMENT SURVEY RESULTS

AGENCY CATEGORIES



OREGONBUYS MARKETPLACE

System Demonstration

MARKETPLACE

- Supports the shopping/buying experience for end users
- Hosts vendor catalogs
- In Oregon, will support the “Buy” decision
- Fully integrated with other system modules: when you empty your shopping cart, the items populate requisitions

OREGONBUYS USER ROLES

Department Access (DA)	End User Role - privileges can be restricted to certain parts of the organization <ul style="list-style-type: none">• Requests (contract shopper or requisitioner)• Receiving
Basic Purchasing (BP)	Buyer Role - broad privileges across the organization <ul style="list-style-type: none">• Creates requisitions, bids, and purchase orders• Edits existing documents• Receiving
Accounts Payable (AP)	Processes invoices and enters credit memos
Accounts Payable Supervisor	Reviews and approves invoices before they go through the interface to R*STARS/TEAMS
Organization Administrator	Manages organization structure, addresses, users, and approval paths

TERMINOLOGY CROSSWALK

OregonBuys Document Title	Description
Master Blanket Purchase Order (MBPO)	Contract that allows for releases (i.e. price agreement, agreement to agree, etc.)
Release Requisition	Order off of a Master Blanket Purchase Order (MBPO) (agency approval paths would trigger as applicable)
Business Intelligence Module (BI)	Provides robust reporting capabilities on all activities within the system. Three components: <ul style="list-style-type: none">• Standard report bundle• Ad hoc reporting tool• Ability to create dashboards

BUSINESS PROCESS INVENTORY

Value proposition: provides information that will be useful in designing agency business processes using OregonBuys

- Keep it simple
- Focus on procurement processes
- Document results

BUSINESS PROCESS INVENTORY

- Convene a group of procurement Subject Matter Experts (SMEs)
- Walk through each procurement type and document related processes
- Note variations in current processes (when X, we do Y; when A, we do B)
- Conduct follow-up data collection as needed
- Document results and noted issues

BUSINESS PROCESS INVENTORY GUIDE



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Instructions:

- On each tab of this template, document your Agency processes based on the Process Inventory Questions Guide.
- If there are multiple processes for each procurement type, either build several processes on the sheet or add other sheets (e.g., Small Procurement: Type 1, Type 2, etc.).
- Consider collecting example documents for each procurement type to support your results.

	A	B	C	D	E	F	G
	Step Nbr	Description	Owner	Change in Ownership from previous Step?	Approval Required?	Related Documents	Agency Policy References
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OregonBuys: Agency Process Inventory Questions Guide

Instructions: for each procurement type used in your Agency, use the following questions to understand and document current processes.

1. What need or action kicks off the process?
2. Who initiates the process?
3. What types of communications or documentation are developed or assembled to initiate the process?
4. What is the next step in the process?
5. Is there a change in "ownership" from the first step to the next step?
6. How is the change in "ownership" facilitated and/or tracked?
7. Are their approvals that occur before the change in "ownership"? If so, who is required to approve (including dollar thresholds)?
8. Repeat items 4 through 7 for each process step until the conclusion of the process.
9. What is the process outcome (e.g., a purchase order, an agreement, etc.)?
10. If applicable, who and when are notifications solicited?





QUESTIONS & FEEDBACK



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THANK YOU!

UPCOMING FORUMS:

ACCOUNTING FORUM | NOVEMBER 13
1:30 – 3 PM EMPLOYMENT AUDITORIUM

MONTHLY FORUM | NOVEMBER 14
9 -11 AM EMPLOYMENT AUDITORIUM