

DPO Advisory Council Meeting

Meeting Date: May 22, 2019

Time: 1:30 – 3:30pm

Location: **ODF**
 2600 State Street SE
 Salem, OR 97301

Attendees: Nancy Cody (DCBS), Sharon Domaschofsky (OSP), Melissa Esser (ODA), Jay Jackson (DAS), Karen Johnson (DOJ), Robert Jones (PERS), Connie Lelack (ODOT), David McKay (ODOE), Sabrina Hay (OPRD), Jessica Nelson (OHCS), Salem Opeifa (OWRD), Rich Palmer (PUC), Toni Payseno (DOC), Whitney Stewart (ODF), Shawn Range (OSL), Tom Riel (HECC), Jean Straight (DSL), Archana Thapa-Sherpa (DOJ), Melody Waight (ODFW), Jon Walton (OBDD), Mande Wilding (ODE), Chris Shaver (OMD), Nicole Brazeal (DAS), Chris Patchell (DAS)

By Phone: N/A

ITEM	DISCUSSION
Welcome/Announcements – Sharon Domaschofsky	
	<ul style="list-style-type: none"> • Introductions were made. • April minutes approved.
OregonBuys Presentation – Sarah Roth (SOS)	
	<ul style="list-style-type: none"> • Debbie Dennis (DAS) gave a brief overview of how we got to where we currently are. We hired a Process Improvement Consulting firm in 2012; their biggest suggestion was to modernize our procurement system. A team was created to explore options for a new system and to move forward with it. An RFP was done and the company Periscope was selected. The Oregon Instance Project was created in 2018; Secretary of State (SOS) went live with OregonBuys this year (2019), Department of Forestry is planning on going live the summer of 2019. Some functionality will only be available in the enterprise-wide version. The enterprise system has been approved. Chris Patchell has joined DAS PS as the Project Manager, Nicole Brazeal is Program Administrator, Lori Nordlien will be Contract Administrator and Karen Johnson is the DOJ Lawyer. Amy Velez will be working with Chris and Nicole on communication. OregonBuys will be a full replacement of the ORPIN System. OregonBuys will serve as an end-to-end system. • Sarah Roth (SOS) demonstrated the SOS test version of OregonBuys. The system is paperless. Terminology is different than ORPIN (ex: a contract in ORPIN is a purchase order in OregonBuys). SOS had to make business decision about how some of their processes would work inside OregonBuys, each agency will have to make the same decisions. Watch the choices you make as they can have repercussions down the line on your procurement staff or customers.

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Vendors **MUST** be registered in OregonBuys to use it or be paid through it.

- Chris Patchell/Nicole Brazeal (DAS) haven't moved forward much technologically since the last meeting. They are working on communication and how/who to communicate with. The roll-out of OregonBuys is a two-year project. Trying to communicate with accounting and budget employees in agencies as they will be impacted by OregonBuys. Please feel free to contact your own accounting and budget staff. They will be developing ways to help agencies to move OregonBuys and maintain legacy contracts in ORPIN.

Questions & Answer

Q: How is SOS dealing with electronic signatures?

A: They aren't using them yet, they're still asking for manual signatures.

Q: Can customers see progression of their request?

A: Yes, and SOS has had customers contact vendors because they could see the vendor was holding up the process! Vendors can see the purchase request and attachments, not notes or DOJ info.

Q: How will OregonBuys keep people from exceeding their authority limits?

A: Purchasing limits will be set at implementation for an agency; Periscope says they'll have to work though that with agencies.

Q: Can a buyer change another buyer's purchase order?

A: Yes, but the change will show the name of the person who made the change & a date stamp.

Q: How does the buyer know who to send the approval requests to?

A: The path is set up at implementation. If staff changes, the path will need to be updated. It will be assigned by agency staff.

Q: Does the purchase order go back to the end user after the buyer reviews it?

A: No, the buyer should be working with the end user if changes or corrections need to be made.

Q: Is a one-year maintenance contract a deliverable?

A: Yes. All deliverables need to be entered so they can be received and/or billed. However, you can upload a CSV Excel spreadsheet instead of manually entering each deliverable.

Q: What happens if you need to spread out payments?

A: Payments can be set to whatever increment needed.

Q: Do vendors have to be registered to see bids in OregonBuys?

A: No, they can view bids without being registered.

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	<p>Q: What happens if you re-negotiate the Marketplace price (statewide price agreement price) with a vendor? A: Marketplace prices can be manually adjusted if the price is re-negotiated.</p> <p>Q: Is SOS using the vendor management piece? A: Periscope still needs to figure out the vendor management piece for the enterprise.</p>
Reference Links	
	<ul style="list-style-type: none">To subscribe to the OregonBuys newsletter: https://oregonbuys.oregon.gov
3:26pm	Close of meeting.

Next Meeting:

Date: June, 26 2019

Time: 1:30 - 3:30 pm

Location: ODF – 2600 State Street SE (Tillamook Conference Room)