

EASE Procurement Project



Procurement Process Changes

Date: 07/06/2017

1. In 2015, the Legislature passed Act 557.
2. The intent was to amend the procurement and reporting of services.
3. The Technical and General Service and Vendor Performance Reporting portals joined the Professional Consultant Service portal on the DFA website.
4. The intent of the EASE Procurement Project is to modernize these and other processes.
5. Our plan is to explain these changes as well as answer your questions.
6. Today's presentation is being recorded to share with those who could not attend today's forum.
7. Please hold your questions and note them on the cards for us to answer at the end of our presentation, during Q&A

Purpose:

- Provide details on EASE Procurement changes
- Answer questions
- Build EASE Procurement webinar

Goals:

- Information
- Clarity
- Knowledge

Presenter:

- Susan Banasiewicz - AASIS

Today's Agenda

1. AASIS Changes
2. Portal Changes
3. EASE Approvals & Rejections
4. Outlook Notifications
5. Highlights & Wrap-Up
6. Q&A

1. Today, we will explain all the AASIS changes created for the EASE Procurement Project
2. We will offer an overview of the new release strategies in AASIS
3. We will discuss the changes to the PCS/TGS and VPR portals
4. We will introduce the new approvals and rejections in EASE
5. We will discuss the Outlook notifications you can expect
6. We will take all your questions and either answer them today or provide an answer on the DFA website.

AASIS Changes

- ✓ Reporting categories: New and Improved
- ✓ New Approval Triggers for POs and OAs
- ✓ New Document types for PR, PO and OA
- ✓ Sub grant PO must reference PR or OA
- ✓ PO/OA line item controls: Delete vs. Block
- ✓ Mandatory PDF attachments for PCS and TGS
- ✓ Release Strategies
- ✓ New “Our Reference” codes for ABA
- ✓ Validity Dates on POs
- ✓ New PR/PO Text Field

1. Reporting categories are now assigned via material groups.
 - A. *Each material number you select, is associated with a material group.*
 - B. *For example, material numbers exist for pens, pencils, staplers, paper clips and tape.*
 - C. *All these items are found within the material group 61500, “office supplies”*
 - D. *The material group “office supplies” is assigned reporting category, COMM (commodities)*
 - E. *AASIS evaluates each line in each document to select the appropriate reporting category according to each material group.*
 - F. *Based on a priority list, the reporting category is assigned based on the highest level report category selected.*
 The priority is:
 - a. *ITCONSTR*
 - b. *ITPCS*
 - c. *ITTGS*
 - d. *ITCOMM*
 - e. *CONSTR*
 - f. *PCS*
 - g. *TGS*
 - h. *COMM*
 - G. *So if you have an OA in which line 1 has a material to purchase “professional service medical” which is PCS and line 2 to purchase “database management” which is ITTGS, your OA should be entered into the TGS portal because ITTGS is a higher priority level than PCS.*
2. *PO and OA Retriggers are as follows: increase TPC, add line, change your validity end date*
3. *New doc types, sub grant PR to PO, sub grant PR to OA, SG OA and SG PO. Subgrants are being used only by those agencies that have been contacted.*
4. *For sub grants, you will only be forced to reference a PR or OA when creating a PO. You must also select discretionary yes or no when creating a sub grant.*
5. *When you have an OA line that still has open Pos, you must block that line, not delete it. Use the padlock, not the trash can. Right click on line and select block.*
6. *When you create a PO/OA for PCS or TGS, you must attach the pdf with the proper naming convention, porg_doc #_or All attachments are now stored in AASIS. If you get a portal error to add attachments, you must do it in AASIS.*
7. *New release strategies have been created in AASIS. The approvals for PCS and TGS have all been moved to AASIS. You must enter your document into AASIS first, then the portal.*
8. *New our reference codes have been created for DBA in order to further break down their approvals “capital improvements”.*
9. *When you create a service PO that will be entered into the portal, be sure to include validity dates on the “additional data” tab so that you do not receive an error in the portal.*
10. *A new line item text in PR and header text in PO and OA have been created for EASE approval comments. The approver can send messages to the document creator when they approve or reject. More on that later.*

Portal Changes

PCS/TGS

- Still created for various thresholds
- PO entries require AASIS validity dates
- Correct Reporting Category defaults into AASIS document
- PCS1(A) and TGS1(A) must be uploaded in AASIS
- No documents uploaded into portal
- Most AASIS data defaults into portal entry

VPR

- Enter quarterly and at sunset for OA
- Enter at end of PO
- Must add attachment with below average rating
- Electronic approval standard
- Paper form no longer required
- Most AASIS data defaults into portal entry

PCS/TGS

Threshold still for PCS: 10-<50 and =>50 and for TGS: 25-<100 and =>100

Because the portal requires them, you must enter validity dates into your AASIS PO.

Rely on the reporting category selected by AASIS

You must upload your correctly named document into AASIS e.g. porg_document number_OR or A1

Unless you're a university or highway, you can no longer upload documents into the portal

If you're an aasis user, most information will default into your portal entry

VPR

Timeframe is still the same, quarterly and at end of OA and at end of PO

You must enter some justification for a below average rating

Your director or his designee will now sign the VPR entry in the portal

If you're an aasis user, most information will default into your portal entry

EASE Approvals & Rejections

Key Highlights

- EASE Inbox available for current approving managers
- Procurement approvals will appear in the EASE Inbox
- Current processes still available
- Access via PC, laptop or Mobile Device with App
- Approve or reject PR and PO with notes
- <https://EASE.Arkansas.gov>
- Free app



EASE

If you approve in AASIS today, you will have the ability to approve in EASE

If you approve leave today, purchasing docs will be in the same inbox

You can still approve in AASIS if you choose

You can use any device to access EASE e.g. iPhone, Android, Laptop, tablet and any other compatible mobile devices.

In EASE, you can approve or reject PR or PO. Be sure to include a note to the document creator so they know what to change

You can get the free app on google play store for android or the app store. Look for SAP Fiori Client. Check training documents for loading instructions

The free app is located in Google Play Store for Android and the App Store for iPhone

If you have not yet migrated to the EASE Time and Leave solution and you are a manager, you will have access to the “My team calendar” but it is not fully functional until you go live with EASE time and leave later this year.

Outlook Notifications

Release code:	1 st Reminders:	2 nd Reminders:
AG - Agency Approval	2 days	4 days
OD - OSP Director Signature	5 days	10 days
OM - OSP Manager	7 days	14 days
OP - OSP Portal Review	7 days	14 days
OL - OSP Final Review	7 days	14 days
DP - DBA Professional Services	3 days	5 days
DD - DBA Director	3 days	5 days
DC - DBA Construction	3 days	5 days
DR - DBA Real Property	3 days	5 days
DS - DIS Review (IT)	14 days	21 days
AL - ALC Review	30 days	45 days



The 1st table: are listed all the new PO/OA release codes and descriptions. Your documents will not require all these approvals, these are simply all possible approvals.

The 2nd table: These reminders are sent to each person on the release strategy. The document creator initially also gets an email, reminding them to select an approver.

The 3rd table: These 2nd reminders are sent to the approvers who still have not approved the document. There is no escalation for procurement document approvals.

Highlights and Wrap-Up

Highlights:

- AASIS Changes
- Release Strategies
- PCS/TGS/VPR
- EASE Approvals
- Outlook Notifications

Key Decisions / Actions:

- All approvals in AASIS
- Block OA lines with open POs
- Report Category defaults
- AASIS data defaults to PCS and TGS
- VPR approved electronically

Wrapping up:

Highlights:

Changes in AASIS
New Release Strategies
Portal Changes
New Approvals
Outlook Messages

Actions:

All approvals are now in AASIS
Block lines on your OA that still has open Pos. Don't delete
The report category defaults into your document
AASIS data defaults into portal
VPR now has esignatures



Standard PO 4501708668 Created by SUSAN L BANASIEWICZ

Document Overview On [Icons] Print Preview Messages [Icon] Personal Setting

NB Standard PO 4501708668 Vendor 100212142 ISI CONTROLS LTD Doc. date 06/29/2017

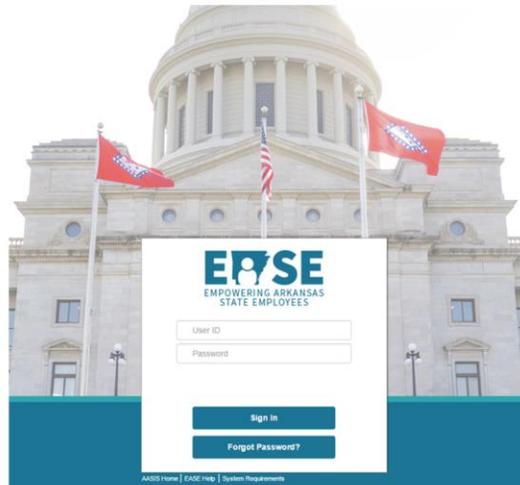
Delivery/Invoice Conditions Texts Address Communication Partners Additional Data Org. Data Status Total Projected Cost Release strategy

Total Projected Cost 150,000.00 Report Category PCS - PROFESSIONAL CONSULTANT SERVICES - NO IT

Item	A	Material	Short Text	PO Qu	O	Delv. Date	Net Price	Req	R	Plnt	C	Cur	Per	O	Matl Group	Stor
1	K	10120120	PRO SERVICE,PHARMACY	2	EA	07/05/2017	1,500.00	12		Reference Plant	D	USD	1	EA	PROF SERV PHARMACIST	
2	K	10590203	REIMBURSABLE EXPENSES,PROF & ADMIN	4.00	ZLS	07/05/2017	1,500.00	12		Reference Plant	D	USD	1	ZLS	REMB EXP PROF/ADMIN	
3	K	10107210	ACL,NAME PLATE, 2' X 10"	1	EA	07/05/2017	5,000.00	12		Reference Plant	D	USD	1	EA	OFFICE SUPPLIES	
4	K	10129413	MAINTENANCE & VALUE ADD SVCS, COPIER	3	EA	07/05/2017	1,000.00	12		Reference Plant	D	USD	1	EA	SERV COPYNG	

Notice how we have various material numbers including PCS, TGS and COMM. However the system recognized that the PCS material group was the critical group so therefore, PCS is the chosen report category.

- Item 1 PCS
- Item 2 PCS
- Item 3 COMM
- Item 4 TGS



This is the logon page to the portal. You will be prompted to login after you click PCS/TGS/VPR on the dfa website. Use your AASIS login

Report only professional consultant service contracts with a Total Projected Cost greater than or equal to \$50,000

General Information					
Agency:	0610 Department of Finance and Administration				
Document Type:	Purchase Order(PO)				
Document No.:	4501708668				
Method of Procurement:	Cooperative Contract				
* Is this an Amendment?:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Initial Term Start Date:	07/01/2017				
Term End Date:	06/30/2018				
Maximum Extension Date:	06/30/2018				
Personnel:	12,000.00				
Expenses:	5,000.00				
Initial Contract Amount:	17,000.00				
Total Projected Amount:	150,000.00				
Contract Summary:	<input type="text" value="new pharmacy project"/>				
Funding Details					
Complete the appropriate boxes below to total 100% of the funding in this contract.					
	Federal Funds	State Funds	Cash Funds	Trust Funds	Other Funds
Select Funding		<input checked="" type="checkbox"/>			
Select % of Fund	0.00	100.00	0.00	0.00	0.00
Identify the source of funds for the following: MUST BE SPECIFIC (i.e. fees, tuition, agricultural sales, bond proceeds, donations, etc.)					
Federal Funds:					
State Funds:	<input checked="" type="checkbox"/>				
Cash Funds:					
Trust Funds:					
Other Funds:					

New portal look.
All this information is defaulted form AASIS
Must enter summary, funding and other fields open for edit.
Hit the check button at bottom to find errors.