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
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.
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.
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
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.
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.
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
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
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.