



ARBuy Phase II: Departments & Entities

May 2021

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Introductions

Transformation & Shared Services

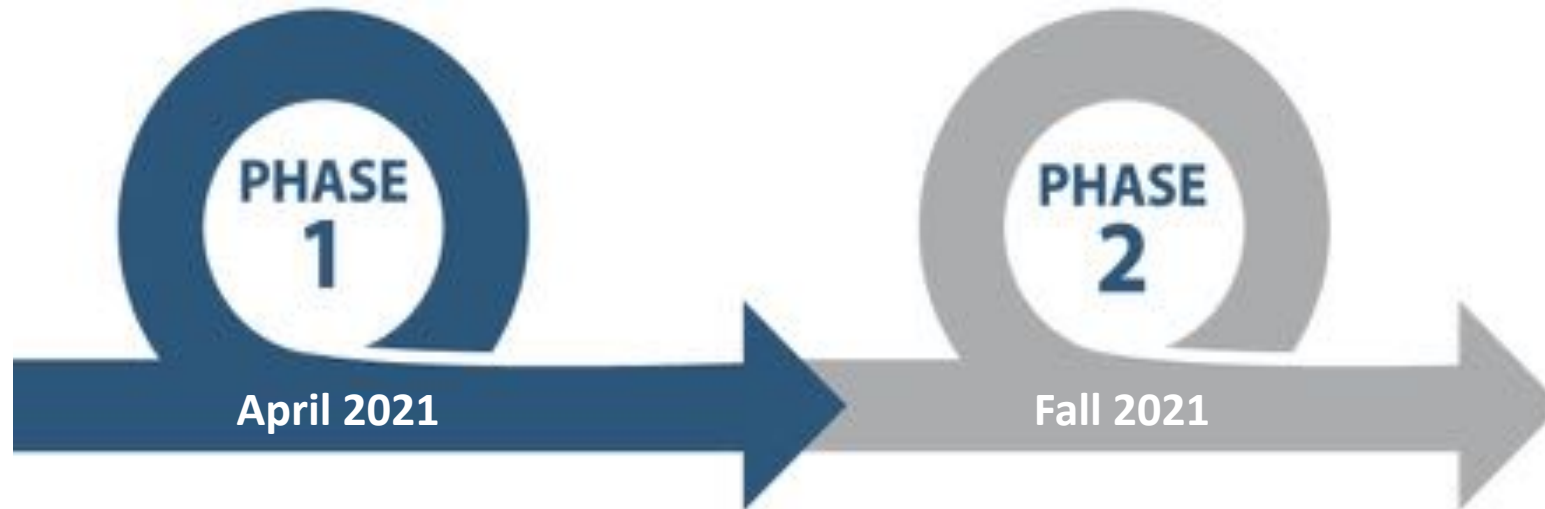
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ARBuy Phased Implementation Approach



- Vendor Registration
- Requisitions (OSP)
- Sourcing/Solicitations (OSP)
- Contract Lifecycle Management - CLM– Pilot (OSP)
- Marketplace Searching & Purchasing for Local Governments

- Vendor Registration
- Sourcing/Solicitation (Departments/Entities)
- Contract Lifecycle Management (CLM)
- Marketplace Searching & Purchasing
- Requisitions
- POs
- Integration with AASIS (will continue Receiving & Invoice processing in AASIS)

Phase 2 Scope: Departments & Entities

- Vendor Registration
- Sourcing/Solicitation
- Contract Lifecycle Management (CLM) for Solicitation preparation and contract origination/amendments
- Marketplace Searching & Purchasing (from Statewide contracts)
- Requisitions
- POs
- Integration with AASIS (will continue Receiving & Invoice processing in AASIS)

Note: following cut-over to ARBuy, users will no longer create Requisitions, Purchase Orders or Outline Agreements in AASIS. These documents will be created in ARBuy and interfaced to AASIS.

Phase 2: Pro Forma Schedule & Rationale

- Current recommendation of joint project team: Go Live in late October-early November 2021
- Integration with AASIS should be fully tested and functional in mid-Sept
- Changes to AASIS (e.g., turning off certain functionality, change in material codes, etc.) need to be executed at one point in time for all Depts/Entities and users
- Single point-in-time cutover to ARBuy avoids duplicate data entry, confusion among users and vendors and maintains system controls

AASIS to ARBuy Cut Over

- Joint project team working on details and milestones in this area
- Training on UNSPSC taxonomy for Depts/Entities
- Outline Agreements (with unspent balances) will be extracted from AASIS for each Dept/Entity (Excel files)
- Dept/Entity personnel will need to re-code each OA Item to UNSPSC codes
- Completed Excel files will be loaded to ARBuy
- Procurement/purchasing personnel will review migrated documents and move them to Sent status in ARBuy
- ARBuy will interface the new OA documents to AASIS

Major Activities: May – Learn/Explore/Decide

- Orient Subject Matter Experts (SMEs) from Departments and Entities: purpose, processes and expected outcomes
- Initiate detailed demonstrations/walkthroughs of ARBuy documents and functionalities (PHI)
- Provide suggested exploration scenarios for SMEs (PHI)
- Execute exploration scenarios with Dept/Entity-specific examples (SMEs)
- Conduct twice-weekly drop-in sessions to answer questions and collaborate on solutions (PHI)
- Document Dept/Entity-specific issues and needed configurations (SMEs)

Intended outcomes: SME knowledge development, “To Be” uses and Dept/Entity-specific configurations and functionality gaps documented

Major Activities: June – Learn/Explore/Decide

- Continue detailed demonstrations/walkthroughs of ARBuy documents and functionalities (PHI)
- Provide suggested exploration scenarios for SMEs (PHI)
- Execute exploration scenarios with Dept/Entity-specific examples (SMEs)
- Conduct twice-weekly drop-in sessions to answer questions and collaborate on solutions (PHI)
- Document Dept/Entity-specific issues and needed configurations
- Launch vendor registration campaign

Intended outcomes: SME knowledge development, “To Be” uses and Dept/Entity-specific configurations and functionality gaps documented

Major Activities: July – Document/Test

- Complete documentation of “To Be” system uses and configurations (PHI & Depts/Entities)
- Develop functional test scenarios (PHI)
- Develop detailed testing schedule (PHI)
- Conduct formal functional testing (SMEs)

Intended outcomes: “To Be” uses and Dept/Entity-specific configurations and functionality gaps documented, test scenarios and schedule

Major Activities: August – Test/Prepare

- Complete functional user testing (SMEs)
- Conduct initial overview of system hierarchy and data collection templates
- Develop and communicate processes for system configurations, user management and approval path development to Depts/Agencies
- Initiate data collection in templates (users, system hierarchy, approvals)

Intended outcomes: Functional user testing report, potential development items documented, system configuration and data upload processes developed and communicated, data collection templates distributed to Depts/Agencies

Major Activities: September – Train/Prepare

- Complete Outline Agreement data migration spreadsheets (Depts/Entities)
- Complete data upload templates

Intended outcomes: OA spreadsheets complete, Data upload templates completed

Major Activities: October – Prepare/Execute

- Conduct/deliver end user training and support materials (PHI)
- Construct approval types/paths in Production (Centralized ARBuy Admin)
- Complete Go Live checklists
- QA/Reset end user accounts in Production (Centralized ARBuy Admin)
- Upload Outline Agreement documents to ARBuy from spreadsheets (PHI) and review/release them (Dept/Entity purchasing personnel)
- Upload other data (organizational hierarchy, users, addresses)

Intended outcomes: End users trained, ARBuy configurations completed, Go Live checklists completed, Outline Agreements migrated, data migration complete

Phase 2 Approach, Services & Support

- Leverage Subject Matter Expert group from Departments (add reps from impacted State Entities) – working group to understand ARBuy functionality and design/plan usage
 - Demonstrate ARBuy module and deliver “test drive” assignments
 - Test drives/decisions by SMEs
 - Twice weekly drop-in sessions to support/collaborate with SMEs
- Decide and communicate when changes to AASIS will be implemented and AASIS purchasing documents re-issued in ARBuy (in advance of Phase 2 Go Live)
- Use ARBuy Dept/Entity Liaison group, ARBuy informational website and monthly forums to ensure ongoing communication and information flows
- Blended learning model for end user training (Online thru MyARCareers and facilitated/in-person courses)

SME Workload Estimates

- From late-May to early-July, 6-8 hours per week for demos/walk throughs of ARBuy and completion of exploration scenarios
- For the rest of the summer and fall, it depends.....
 - Who performs OA data migration tasks
 - Who collects data for upload to ARBuy (e.g., users)
 - Level of outstanding issues for Dept-Entity (on uses of ARBuy)

What's Next & Action Items

- Confirm SMEs for Department – existing list will go out tomorrow
- First SME meeting will be 5/13/21 – invite will go out this week

Questions for You

- For folks that haven't seen a demo of ARBuy – should we plan one – high-level, more executive-oriented?
- Since the OA upload spreadsheets need to be completed by 10/1 for upload to ARBuy, when should this work begin?
- What additional information would be valuable for SMEs – to be presented on 5/13/21?



Q&A

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Visit the new ARBuy informational website! www.periscopeholdings.com/arbuy