

evolve'17
CONFERENCE

BuySpeed-BidSync Integration

Greg Higgins & Teresa Isensee

Summary

- **Integration between PHI's BuySpeed product and BidSync Links/Links+ product: Periscope Supplier Network (PSN)**
- **Provides for broader distribution of solicitations throughout PHI's customer base**
- **Benefits vendors**
- **Easy to configure**
- **Available in BuySpeed software versions 12 and above**



Integration Value Points



Solicitations

Distribution of Solicitations
broadened through PSN



Vendor Registration

Vendor registration simplified
for existing Links/Links+
customers



Vendor Opportunities

Access to opportunities across
PHI's client base

Solicitations



- **All BSO solicitations posted in BidSync**
- **Nightly notifications to PSN vendors on opportunities (through BidSync)**
- **Ability to add BidSync vendors to solicitations for direct notifications**

Vendor Registration



- **Potential to broaden your own vendor pool**
- **Eases registration for existing Links/Links+ vendors**

Vendor Opportunities



- **Click through establishes new Links account for vendors**
- **Access to BSO solicitations across all customers**
- **Option to upgrade account for broad array of public sector opportunities**
- **Broaden opportunities for special vendors**

How We Support Implementation

- **Collateral Material (briefs, email blast scripts, etc.)**
- **PSN Vendor lists/analysis**
 - Within geographical area
 - Special vendors within geographical area
- **Call Center support for your vendors**
- **Toolkit and webinars for PSN members to educate and improve responses**

Q&A

evolve'17
CONFERENCE

Vendor Performance

Etolia Biggs

Snapshot of Vendor Performance



- **Vendor Performance in BuySpeed**
- **Outcomes and Benefits**
- **System Demonstration**
- **Configuration Options**

Vendor Performance



What is it?

A module that allows system users to document performance of the vendor against a Purchase Order

How Does it Work?

- Standardizes departmental documentation and rating of vendor evaluations
- Notifies Procurement Department of documentation
- Allows vendor feedback (if desired)
- Provides standard dashboard and ad hoc reports



Vendor Performance Documentation

Department Users/Purchasing Users

- Document compliance
- Document deficiencies
- Recommend resolutions

Vendor Users

- Respond to Agency documentation
- Communicate resolutions

Purchasing Users

- Approve documents
- Provide initial and final determination



Vendor Performance Outcomes

Vendor accountability

Standard documentation

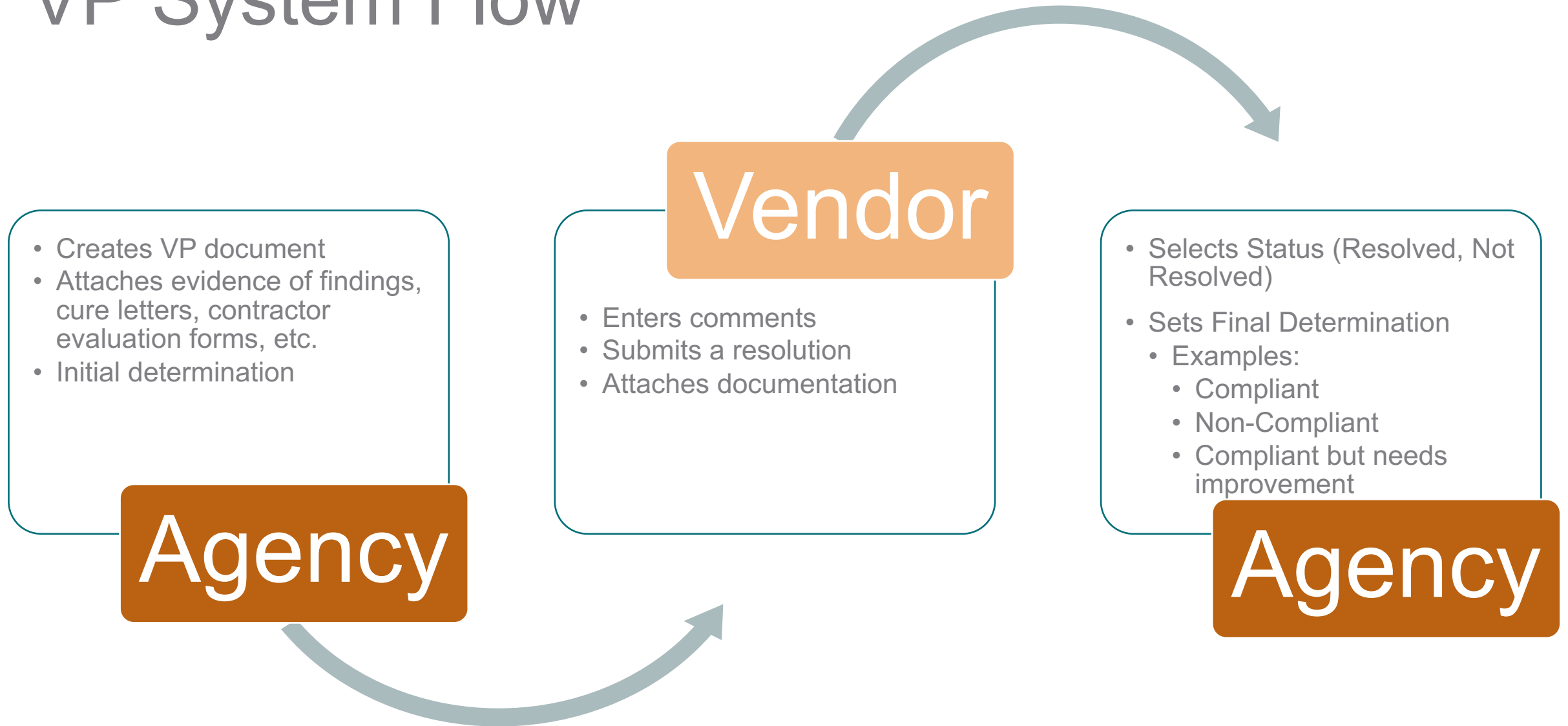
Single source for performance history

Pre-qualification data

Shared dashboard with performance index



VP System Flow



System Demo

Configuration Decisions



- **Category code**

- Criteria to be evaluated
- Ex. Contractor Performance, Technical Ability

- **Performance Evaluation Code**

- Weighted scale (0-5)
- Ex. Poor, Fair, Very Good, Excellent

- **Determination Code**

- Agency initial and final assessment
- Ex. Action Required, No Action Required, Compliant, Non-Compliant

VP Dashboard

Organization Information Users Address Commodity Codes and Services Regions Terms & Categories Attachments **Vendor Performance**

Vendor Performance Information

Vendor Performance Report

For Vendor Number - 00000002

Average Score / Number of Documents

Average Vendor Score: 3.50 / 4

A horizontal scale from 1 to 5. The scale is divided into three colored regions: Low (red, 1-2.5), Middle (yellow, 2.5-3.5), and High (green, 3.5-5). A black triangle marker is positioned at 3.50.

Vendor Performance by Organization

AGENCY - Procurement Organization Score: 3.50 / 4

A small version of the performance scale from 1 to 5, with a black triangle marker at 3.50.

Maintain Vendor Performance Codes - Performance Evaluation Codes

Code *	10-5
Category *	Contractor Performance ▾
Description *	Excellent
Weight (0-5) *	5
Status *	Active ▾

Vendor Performance Recap



Agency Standards



Agency Defined Criteria



Agency/Vendor Transparency





BuySpeed-Vendor Category Integration

Jen Griesse & Greg Higgins

Summary

- **Integration between PHI's BuySpeed product and client vendor tracking systems**
- **Provides data consistency between systems with no manual intervention**
- **Currently in use in Illinois, City of Philadelphia and City of Portland, OR**
- **Batch updates to BSO vendor records**
- **Easy to configure and test**
- **Available in BuySpeed software versions 13 and above**

Integration Points

**BSO Vendor
Record
Updates**

Inbound file with vendor
certification data

IL?

**B2GNow
Record
Updates**

Outbound file(s) to B2GNow to
provide data on Bid Awards
and subcontractors

Technical Features

- **Batch integration**
- **File transferred securely (e.g., SFTP)**
- **Inbound flat file (txt)**
- **Background configuration of mapping of file data**

Other Integrations

- **MA: SBPP**
- **NJ: SAVI & AA-EEOC**
- **Ability to leverage new standard integration across several vendor categories**

Q&A

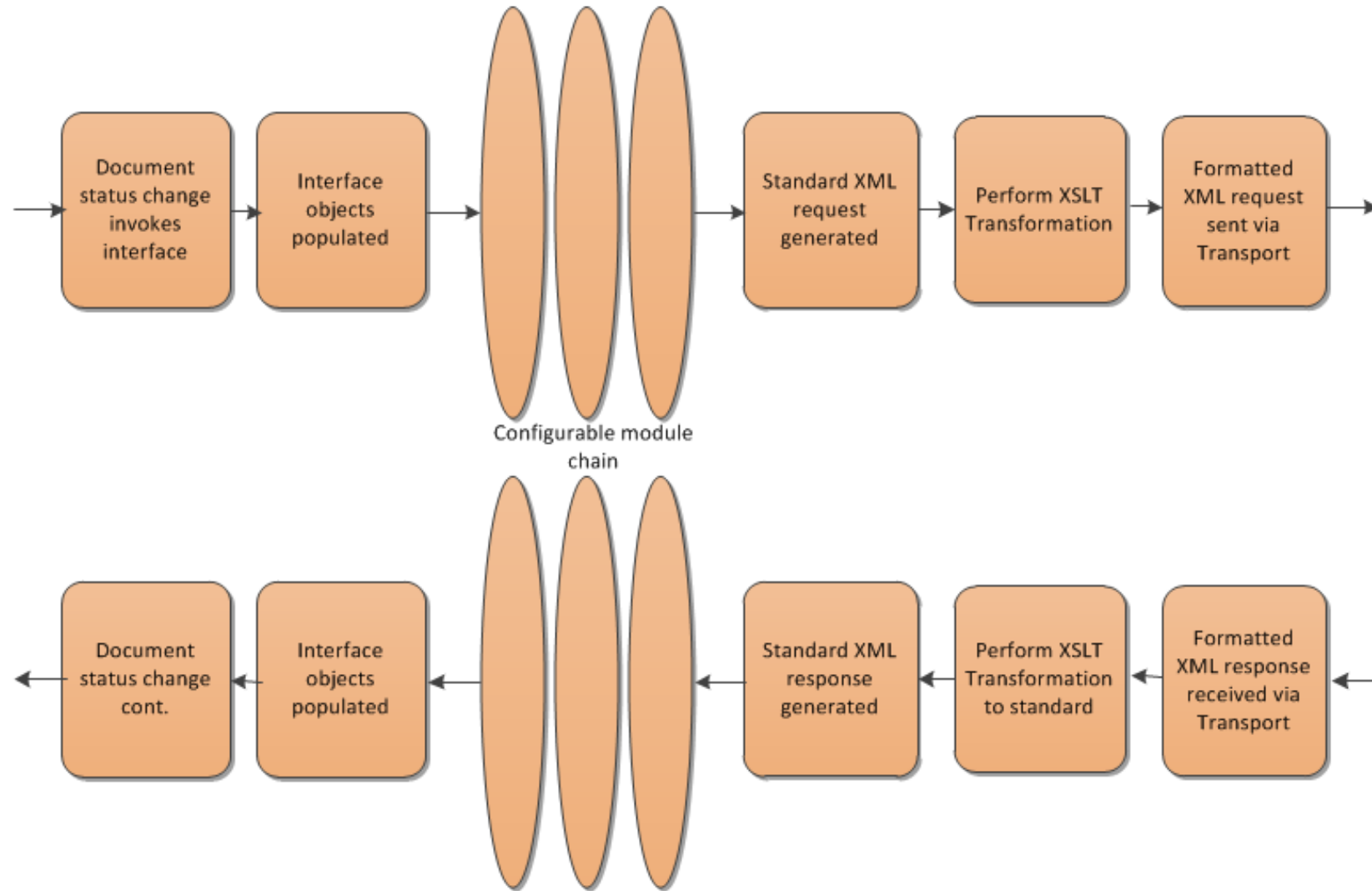
evolve'17
CONFERENCE

Integration Best Practices and the Future

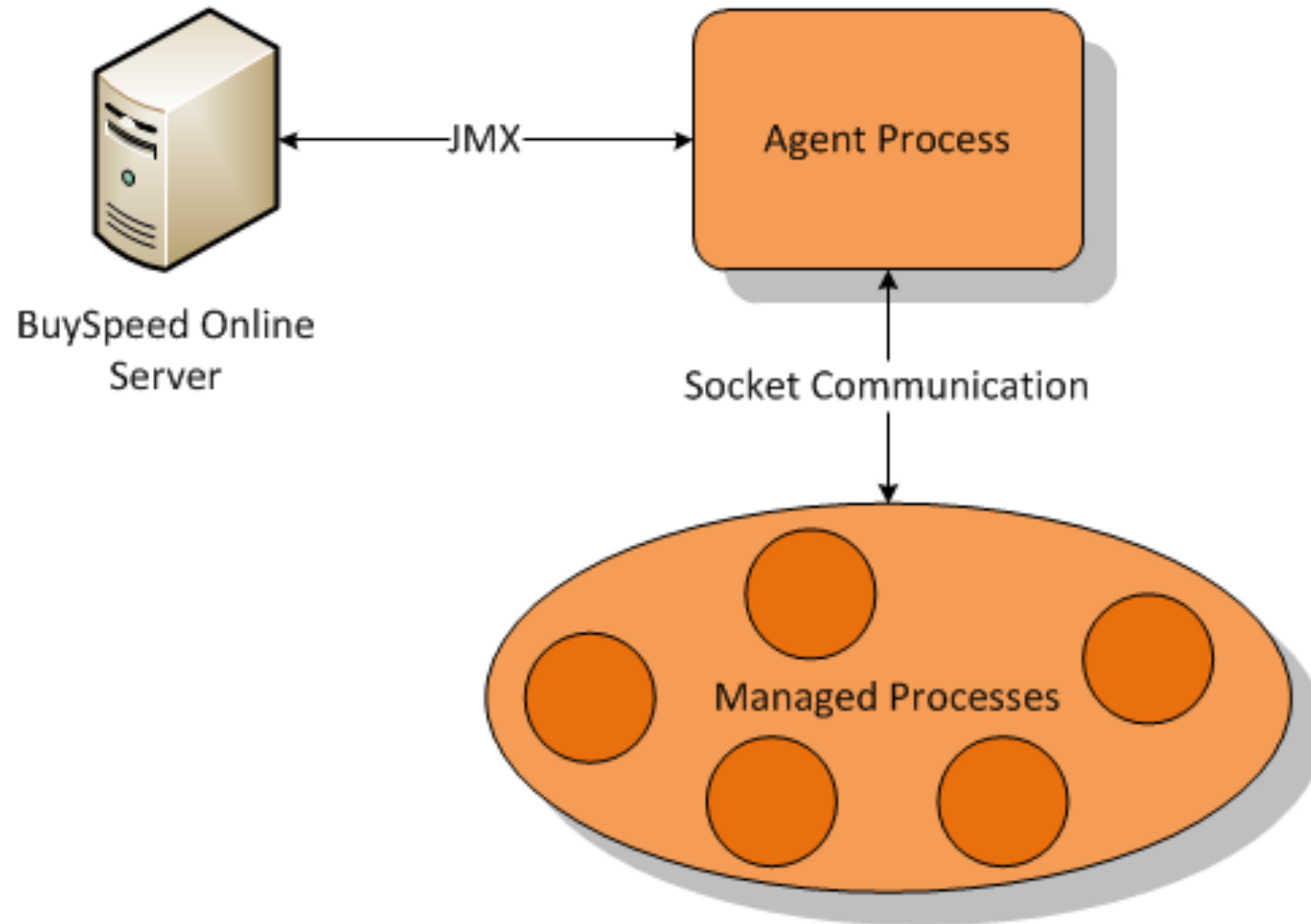
Malcolm Bellon & Jacob Sulpice

Integration Overview

Standard Integration



Batch Integrations



Dynamic Web Service and XSLT Configuration

Interface Settings

Transport Settings

PreEncumbrance

Transport Type: None SOAP XML over HTTP

URL:

Service Name:

Port Name:

Name Space:

SOAP Action:

Username:

Password:

Test Connection

Import XSLT Files:

Request: No file selected.

Response: No file selected.

Encumbrance

Transport Type: None SOAP XML over HTTP

URL:

Service Name:

Port Name:

Name Space:

SOAP Action:

Username:

Password:

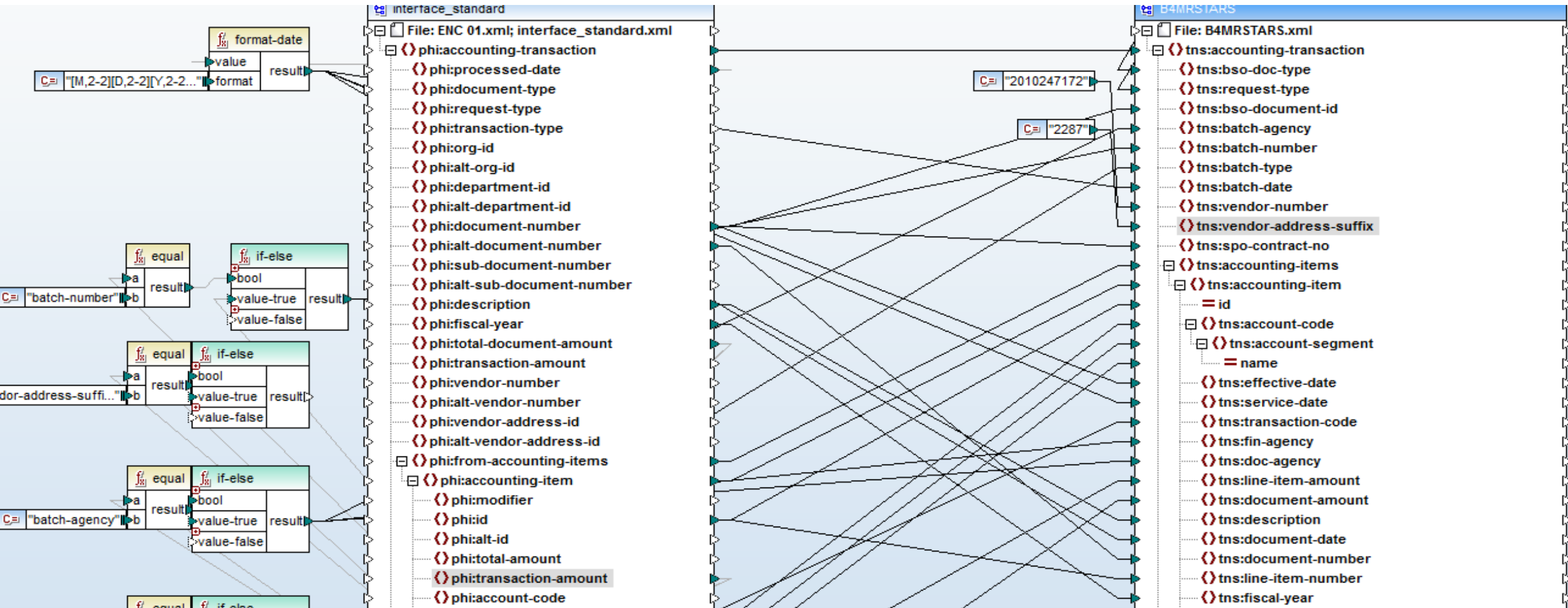
Test Connection

Import XSLT Files

Request: No file selected.

Response: No file selected.

Data Mapping and Conversion



Periscope has been building integrations to external systems for years.

What have we learned?

3 Keys to a Successful Integration Project

**Client
Engagement**

**Regular
Communication**

**Rapid
Feedback**

What are the most
common challenges
faced by integration
projects?

Requirements Challenges

**Collaboration
is Key**

Gathering complete requirements from multiple stakeholders is an intricate process. No one person knows understand all of the requirements.

**Assumed
Knowledge
and Process**

There is often assumed knowledge and behavior that is not clearly stated in integration requirements.

Development Challenges

Scheduling

Development resources are in demand. Can be difficult to schedule dev time as part of a project without conflicts.

Cost

Development resources and code maintenance can be expensive. This increases the cost of the integrations.

Telephone Game

The customer told the integration designer...
who told the developer...

Testing Challenges

**Integrations
can be
Complex**

**Assumed
Knowledge**

**Real vs
Mock Data**

**Connecting to
Live Systems**

Integrations require thorough, extended testing. There can be a back-and-forth where issues are discovered and need to be resolved in development.

Although it is valuable, in that it results in a better end-product, the back-and-forth takes time and can have adverse impact on a project schedule.

How can we use
technology to
change our
approach and
provide better
solutions?

Project Jigsaw

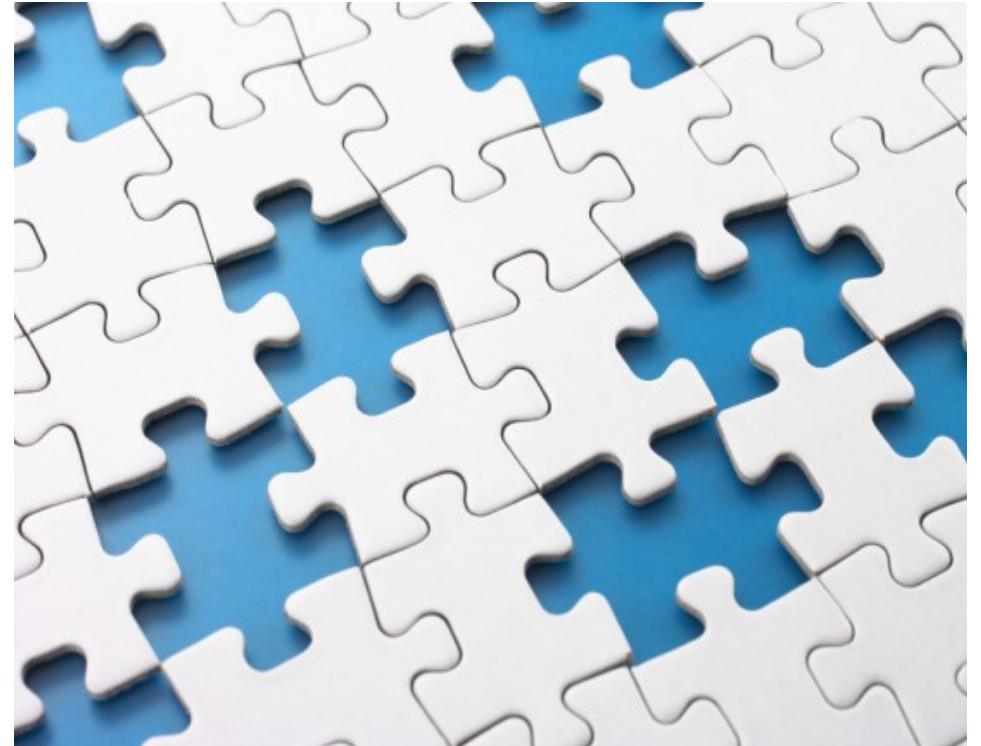
“Putting the Pieces Together”



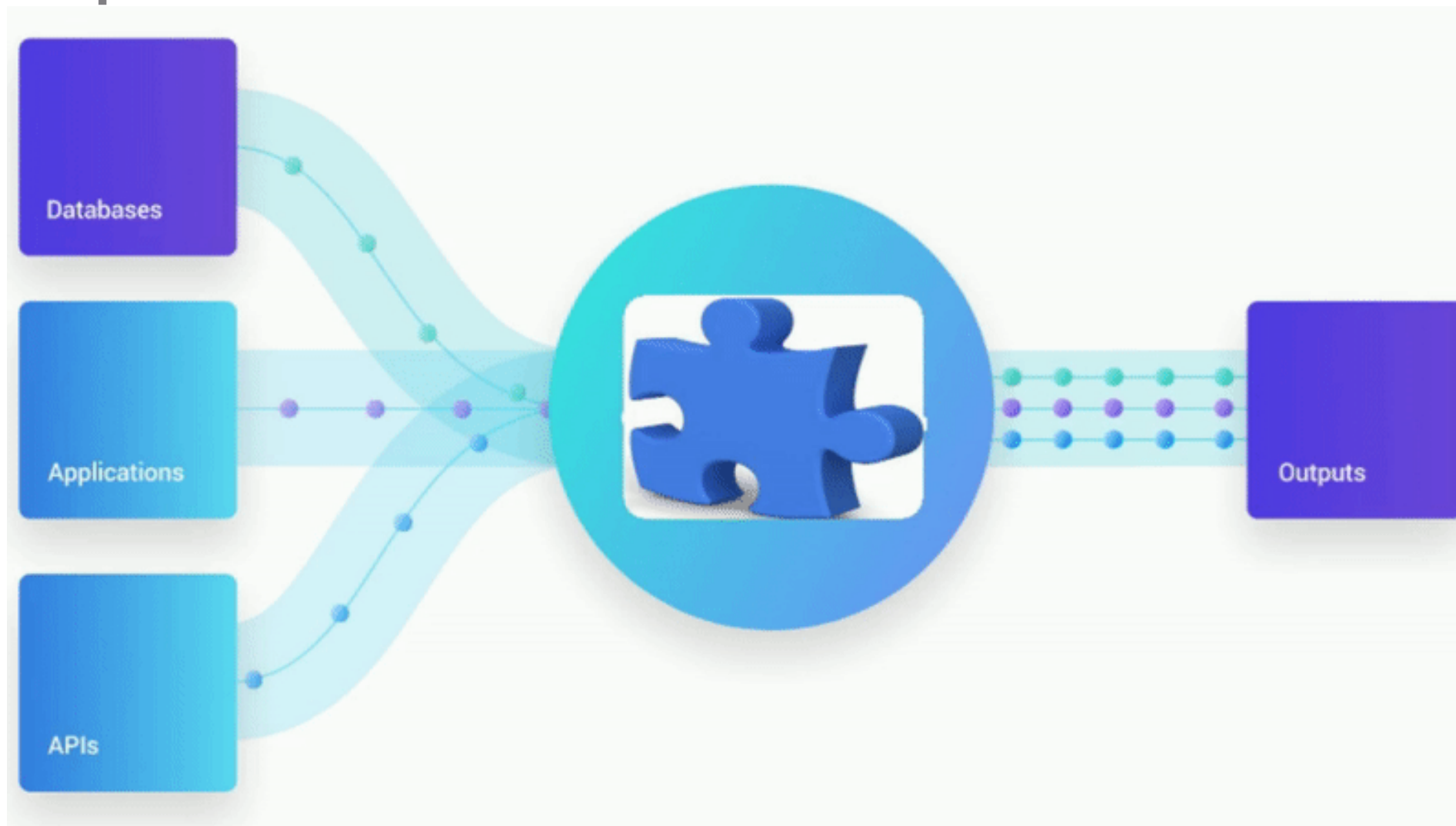
What is it?

Project Jigsaw is an initiative to :

- Enable an integration designer to construct integrations using high-level components and the latest in data processing and tooling (ETL), without developer involvement.
- Enable rapid interface prototyping, composition, testing, and deployment.
- Increase resiliency and scalability of integrations thru a shared architecture.
- Reduce integration time.



Conceptualization



Architectural Requirements

Multi-tenant Architecture

A single application that runs all client integrations processes, both real-time and batch.

Shares server resources to reduce costs.

Component Driven

Modular design that leverages loosely-coupled components that can be “stitched together” by users in different combinations as needed.

A Tool for Procurement Experts

Allow integrations to be built by the same knowledgeable people designing the integration, the procurement and integration specialists.

Constant Monitoring

Active monitoring of system health, performance, transaction status and flow.

Features

Jigsaw will need to support the elements requested by clients for successful integration.

Data Input / Output Support

- Protocols – FTP, SFTP, HTTP, HTTPS
- Flat File - Delimited, Fixed Width
- Format – Text, XML, JSON
- Web Service - RESTful, SOAP/WSDL
- Database – SQL, NoSQL

Data Transformation

- Intuitive data mapping UI
- Function library for Data Transform
- Scripting language support
- Conversion of data from one supported format to another

Additional Needs

- Scheduling
- Support for sending email on success / failure
- Transaction logging
- Security

How does this
solution help?

Requirements Challenges

SOLVED

**Collaboration
is Key**

The designer that is working with the stakeholders will construct the integration using the new platform. That designer possesses the knowledge and context necessary to most successfully implement the integration.

**Assumed
Knowledge
and Process**

As requirements are discovered, as either part of design or testing, the designer will be able to triage, discuss the changes with stakeholders, and make necessary changes quickly.

Development Challenges

SOLVED

Scheduling

The designer can begin prototyping the integration even before requirements gathering is 100% complete.

Cost

Leveraging existing components allows for rapid development and delivery. A shared infrastructure also reduces cost.

Telephone Game

The customer told the integration designer... who built the solution.

Testing Challenges

SOLVED

**Integrations
can be
Complex**

**Assumed
Knowledge**

**Real vs
Mock Data**

**Connecting to
Live Systems**

The integration designer can be on-hand and make “live changes” during initial testing. This provides rapid feedback and allows integration issues to be resolved quickly.

3 Keys to a Successful Integration Project



**Client
Engagement**

**Regular
Communication**

**Rapid
Feedback**

Questions or Thoughts?



evolve'17
CONFERENCE

Advanced Business Intelligence Solutions

Alex Ladik with Dede Preno

Approach



- **Introduction and Access: Getting to know your Team @ Periscope**
- **Business Intelligence v14**
- **Solution scenario: City of Philadelphia**
- **Q&A**

Implementation Team Dynamics



Alex Ladik – Technical

Dede Preno – Functional

- Experience and Solutions for 50+ clients ranging from Statewide to Private Entity
- Consultative Approach
- DiSC/TopGrading certifications
- Database/Coding Architectural Fluency for BI solutions

Advanced Solution: City of Philadelphia

Identification of Challenge

- Integration with the B2G Now system
- Send contract information
- Specific formatting of file for loading Requirement

Challenge Breakdown

- Utilizing the Standard Report functionality
- Customization needs

Resulting Solution & Application



Resulting Solution & Application

Customized the Delimiter

Outputs exact CSV file to SFTP

B2G Now has necessary requirements for extraction and data integration

- **Import file scheduling**
- **Potential for BI solutions for current side systems using this strategy**

