



MEETING MINUTES

State of Louisiana ERP Project

Blueprint Workshop / RFQs / OAs and Portals

Session: LOG-MM-018

October 23, 2008.

Location: CLAIBORNE/Room 1-132 Wyoming Room

LaGov/Logistic Team Attendees

Belinda Rogers
Brad Denham
Sudhir Deshmukh
Kenya Lipscomb
Adam LaTour
Ryan Sides
Ginger Roberts
Llewellyn DeFoe
Jack Ladhur
John Oglesby

Agency Attendees:

No.	Name	Agency	Invited?	Attended?	Comments
1.	Bernsten, Glen	ERP	Y	N	
2.	Kelly, Will	ERP	Y	N	
3.	Lea, Denise	OSP	Y	Y	
4.	Parent, Carla	DOTD	Y	N	
5.	Smith, Susan	OCR	Y	N	
6.	Sonnier, Felicia	OSP	N	Y	
7.	Thangamani, Anand	ERP	N	Y	

<i>Agenda Item and Notes</i>	<i>Owner(s)</i>	<i>Action Items & Assignments</i>	<i>Comments / Follow-up</i>
1. Logistics, Ground Rules, & Introduction		• None	
2. Project Timeline		• None	
3. Workshop Objectives			•
<ul style="list-style-type: none"> • Review Current LaPAC Portal Functionality • Process for Entering new information to the Portal • Process for Changing information on the Portal • Process for Deleting/Removing Information from the Portal • Review Current ECAT Portal Functionality • Process for Entering new information to the Portal • Process for Changing information on the Portal • Outline LaGov Solution Options 			
4. Business Process Review		• None	See “Discussion” below.
5. Action Items			
<ul style="list-style-type: none"> • IBM to meet with the state at a later date to decide if the new website will be created from scratch or if LaPAC can be “trimmed down” to accompany the required functionality. 			

Discussion:

Current state portals are not just websites, but they also have functionality. Two of the largest portals (LaPAC and ECAT) will be covered in the meeting today. Each agency can also have their own portals.

LAPAC

Files can be downloaded in .PDF, excel, and word docs.

Reports can be created for vendors with inactivity.

The security between LaPAC and AGPS are independent of each other.

“Auto-post” is an automatic loading of documents to LaPAC followed by an email notification that indicates documents have been posted to the website. Vendors register in certain commodities in order to receive email notifications that a bid exists for those commodities. Auto-posting is real-time.

Un-awarded bids (not accepted or rejected) are automatically purged after 180 days. Vendors can also be purged. Once vendors are purged, they can be added back to the system as their vendor files were previously moved to a “purged” non-active folder.

Vendor functionality is only available to a vendor if the vendor registers.

Incremental documents for addendum are published to LAPAC and these documents are associated with the original document. The full original document file is not posted again.

A manual update/upload is performed by a user.

User can choose the posting method (manual or automatic). CFMS does not have the ability to auto-post to LaPAC. A user cannot auto-post an attachment to a bid in LaPAC as AGPS does not have the ability to store attachments. LaPAC is the only database of the "full" bid (base document and attachments). Once a document is marked as auto-post or manual upload, it cannot be changed.

The numbering scheme used for posting (the bid number) is different between manual and auto-post so that the two types can be easily distinguished. A numbering scheme for both document types does not exist. LSU usually provides a URL for vendors to link out to contracts in their own system. If a bid opening date is updated, LaPAC will auto update the date.

Only the awarded document is posted. All other bid responses from the various vendors are not loaded to LaPAC. The responses are mailed in responses and are manually loaded.

A common email notification for both auto-post and manual posts exists.

ECAT

Allows requisition to be created from a contract ie shopping cart functionality - New "requisition" or punch out ECAT holds login data for Punch out catalogs.

Security is maintained in ECAT for non AGPS users and vendors via the user's ID.

The system will not replicate requisitions in AGPS for non AGPS users. Requisitions can be created that will generate multiple POs.

If a requisition is created and payment method of Pcard is used then the PO can be printed from eCat and mailed to the vendor. When the payment method is not PCard then the PO is sent to AGPS where it goes through the encumbrance and approval process.

Recent analysis was completed and the results indicated that this application is not extensively used for non-State entities (12 Reqs in last 3 yrs). It was assumed that most non-State entities are only utilizing ECAT for informational purposes. Orders are then created in their own systems using the information found in ECAT.

Most users in ECAT use their PCARD for punch-out ECAT orders. If the users do not plan to use a punch-out vendor, they will usually create their orders in AGPS instead of ECAT.

Unit of Measure conversion tables are maintained in eCAT for Punch out transactions.

A User's ID is synced between eCAT and AGPS; therefore, a user will only have a single user ID for both systems.

DOTD

All of the DOTD portals can be accessed from their main website.

The commodities procurement group at DOTD uses LaPAC for advertising some of their solicitations. Their current system, PIMS, has its own website for public view.

LAPAC would meet their current functional requirements; however, LaPAC is not used often.

DOTD Professional Services

The Professional Services portal is largely an informational portal for documentation viewing. Currently vendors cannot see other bids, but can see the invitation. Vendors cannot submit electronic bids for Professional Services. Mailed in bids are required for professional services. Vendors can submit their information via the website but the info does not feed back to DOTD's vendor database outside of the portal. The portal uses the vendor's info to send email notifications of new solicitations that are posted to the website. The portal also houses information such as SEBD information. This portal is built and maintained by DOTD.

DOTD Construction

It has not been determined if DOTD construction bidding and processing will be completed in SAP. All transactions that occur through the construction portal are fully electronic (vendor registration, bidding, award, etc). DOTD does not have to advertise in any other publication other than the DOTD website if they choose. In order to submit an electronic bid, the vendor must register and be approved as an online bidder. The bids are submitted via a 3rd party software called BidX, where the vendor pays a onetime setup fee and a monthly fee to be able to submit bids. DOTD would like to maintain the functionality of the "information only parties" that do not bid but are only accessing the website for information. Vendors pay for one electronic signature per state because signatures are required on each bid submittals. Contracts still require physical signatures similar to State Purchasing contracts. Bids Bonds and performance bonds are currently received electronically. DOTD maintains an offline process for projects less than \$500,000. These advertisements are still maintained online.

SAP

All the functionality described for non public portal functions is standard in SAP. MDM (the SRM catalog database) is typically not built to be a publicly accessed database, so another web-based application will need to be leveraged. The interface between MDM and ECC is delivered. If new fields are added to MDM then the delivered interface will need to be modified to accompany the new fields in ECC.

ECAT is maintained by an outside vendor. The state has no intention of continuing with ECAT.

New Website Portal

DOTD's commodities website is not flexible enough to develop/expand around it for the entire state to utilize. The website that will be created for the public's viewing will not be DOTD's website or LaPAC. The search functionality that exists in LaPAC will suffice for the new website. The website should have all available procurement documents (Contracts, RFQ, Awards, PO). The Search capabilities should at least encompass what currently exists in LaPAC. The website will be a public website, which will provide a link back to a vendor registration application in SUS (supplier self service portal).

Extract file will be needed for contacts only

DECISION TO BE MADE AT A LATER DATE: Will the new website be created from scratch or will LaPAC be "trimmed down" to accompany the required functionality.

Other states are posting their bid replies for the public's view.

The contract data in SAP must be extracted daily, and sent for upload into a non SAP user's database (LSU).

Key Decisions

- The nonAGPS user requisition and order creation functionality in the future system will be eliminated. When eliminated, the new functionality will need to be communicated to those nonAGPS users.
- The new public website will require the functionality that all bid replies will be posted to the website after the opening date, but before the award date. It will also require that the system communicate who bid, what they bid, and who received the award.

Organizational Impact

- The nonAGPS user requisition and order creation functionality in the future system will be eliminated.

Parking Lot

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FRICE-W

- I – Future decision to be made on how the portal will store/display information.

Integration Points

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