DBOR Release 2.3.0 Bulletin

Title: New DBOR Release 2.3.0

Issued by: Frank Gould, DBOR Application Manager

Date: 31 January 2001

Audience: All DBOR Users

Impact: There are several application and database changes with this release as described in this document below. As part of installing this release, DBOR will be brought down Friday, 2 February 2001, at 8:00PM (ET). DBOR Release 2.3.0 will be available Monday, 5 February 2001, at 6:00AM (ET).

Action: Please review this document and forward any questions or comments to your DBOR User Team representative. Report any system problems to the DBOR Help Desk at (407) 805-5128.

Description

The DBOR (Data Base of Record) User Core Team is pleased to announce a major new release containing significant features to support business objectives for AT&T and IBM. These enhancements apply to only Midrange Resource Projects and include: 1.) IBM Procurement Planning and Acquisition Phases, 2.) Automated Email Notifications, 3.) Authorized Step Update Permissions, 4.) Automated Process Controls, 5.) New IBM Implementation Phase Step #2, 6.) revisions to AT&T Acquisition Phase Step #5, and 7.) Project State of Hold defined as AT&T or IBM. Each of these enhancements is described in the following sections of this document. For more detailed illustrations of these new features, please click on the web address listed below to review the DBOR Release 2.3.0 Training Presentation (**Warning: Large File Size**).

<div align="center">

DBOR Release 2.3.0 Training Presentation

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To prepare for this release, the DBOR User Core Team would like to inform you that several activities have been planned to facilitate a smooth transition from the existing production application to the enhanced DBOR Release 2.3.0. The team has carefully reviewed and decided several alternatives to ensure successful user and data migration and to minimize user disruption during and after this transition. Release 2.3.0 Training has been completed for the trainers and the remaining end users affected by this release are scheduled for training on 1 and 2 February 2001. Please review the following information to understand fully how this upgrade may affect you.

Please note that with this release and all future releases, the information users input into DBOR requires accurate quality and careful decisions so that Process Controls and Automated Email Notifications operate as designed. For instance, the Vendor Committed Dates cannot be updated once they are submitted. Therefore, these date metrics must be accurate the first time they are submitted and cannot be changed.

In the document below, there are several illustrations showing some of the enhancements contained in this release. The DBOR development team has several future release enhancements that we hope will improve your business results and productivity.

If you have any questions or comments, please contact the Help Desk at (407) 805-5128 or email to the following address: fgould@us.ibm.com.

> For more information on the DBOR User Core Team, please click on the following web link below:
>
> ### DBOR User Core Team Main Menu

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IBM Procurement Planning and Acquisition Phase Enhancements

To track IBM Procurement Planning and Acquisition project progress, DBOR now provides two new IBM phases that immediately follow the existing Project Planning Phase. These two new phases include steps for authorized users to update and record each step's progress through each phase. As each step is completed, an automated email form will appear that allows the user to add comments or additional email recipients before sending the email to the next user in the phase. The existing AT&T Acquisition phase procedures are not affected by these new phases. However, only one Acquisition – AT&T or IBM – per Project is allowed.

<u>Benefit</u>

The new DBOR IBM Phases and Steps provide a centralized location for users to record and track the planning and acquisition activities associated with a project. Currently, IBM purchases information is being collected in a spreadsheet located in a shared folder where only one user at a time can update the spreadsheet containing all projects. With Release 2.3.0, multiple users can simultaneously update projects to record the information previously captured in the spreadsheet. In addition, new DBOR Process Controls help guide the user by evaluating data entry and determining the next step in the process.

<u>Impact</u>

Users will recognize few changes to their daily DBOR operations. Instead, these new phases contain steps that are started only for IBM purchases and are divided amongst several user groups. For instance in the IBM Procurement Planning Phase, an IBM Initiative Manager starts the IBM Procurement Planning Phase, the IBM Acquisition Management group updates two steps, the AT&T Supplier Management Division group may optionally update a step, the IBM Finance group updates one step, the AT&T Acquisition Management group updates two steps, and the IBM Asset Management group updates the final step to complete the phase. In the IBM Acquisition Phase, the IBM Asset Management group starts the IBM Acquisition Phase that starts the Acquisition Clock, the same IBM Asset Management group updates the first step, and the IBM Order Management group updates the last two steps to complete the phase and stop the clock.

<u>Action</u>

Each user in these groups must have AT&T network access and Unified Global Domain (UGD) IDs in order to access and update its respective step in both the IBM Procurement Planning and IBM Acquisition Phases. Please refer to the Authorized Step Update Permissions Enhancements section below for more details.

To start an IBM Procurement Planning Phase, the user must click on the **HERE** link directly below the Project Planning Phase as illustrated below.

Project Phases - Steps						
Step Name	**Req**	**Start Date**	**Compl Date**	**Owner**	**Org**	**Action**
Planning Phase						
1: Services/Funding Summary	Y	Feb 6 2001 8:00AM	Feb 6 2001 9:00AM	Wynne Sirbu	ITS-IM	UPDATE
2: Client Requirements (IRD)	Y	Feb 2 2001 8:00AM	Feb 2 2001 9:00AM	Bob Keilholz	ITS-TSC	UPDATE
3: H/W Cap Mgmt.	Y	Feb 2 2001 8:00AM	Feb 2 2001 9:00AM	June Atha	CAP PLNG	UPDATE
4: Acquisition Prerequisites	Y	Feb 2 2001 8:00AM	Feb 2 2001 9:00AM	Wynne Sirbu	ITS-IM	UPDATE
IBM Procurement Planning Phase		Click _HERE_ to begin, update, or reject				

After submitting the phase start forms, the IBM Procurement Planning Phase will appear as illustrated below.

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IBM Procurement Planning		Phase Started: Feb 6 2001 8:00AM				
1: Acquisition Prerequisite Compliance	Y			Unknown UnKnown	IBM Acq Mgt	UPDATE
2: Evaluate Vendor Quotes	Y			Unknown UnKnown	IBM Acq Mgt	UPDATE
3: Review IBM/AT&T Quotes for Better Price	Y			Unknown UnKnown	AT&T SMD	UPDATE
4: Calculate IBM Pricing	Y			Unknown UnKnown	IBM Finance	UPDATE
5: Obtain AT&T BOU Approval/Cancel	Y			Unknown UnKnown	AT&T ABM	UPDATE
6: Obtain AT&T Gov Team Approval/Cancel	Y			Unknown UnKnown	AT&T ABM	UPDATE
7: AATP-B Form Received by IBM	Y			Unknown UnKnown	IBM Asset Mgt	UPDATE

In the example above, the IBM Procurement Planning Phase Steps can be updated by clicking on the Update button located in the right column of each step. For those who have permissions to update these step, an update form will appear allowing them to input data into the form and save it. For those who do not have permissions, an access denied message appears. For more details on each IBM Procurement Planning Phase Step, please review the DBOR Release 2.3.0 Training Presentation via the web link above.

After completing the IBM Procurement Planning Phase, the IBM Asset Management group will start the IBM Acquisition Phase. This is accomplished by pressing the IBM link to the right of the Acquisition Types. For AT&T Acquisitions, the user presses the AT&T link to the right of the Acquisition Types to start the phase.

Acquisition Phase	NOTE: ONE PROJECT MAY HAVE ONLY ONE TYPE OF ACQUISITION PHASE
Click on IBM or AT&T name below to begin, update Contact Person, or Reject Phase for the Acquisition Type desired	
New Hardware Installation (1) IBM AT&T	
Hardware Growth/Upgrade (2) IBM AT&T	
Hardware Disconnect (4) IBM AT&T	
Hardware Maintenance-New/Change (5) IBM AT&T	
Hardware Maintenance-Renewal/Extension (6) IBM AT&T	
Software-New/Change (7) IBM AT&T	
Software-Renewal/Extension (8) IBM AT&T	
Hardware Relocation (9) IBM AT&T	

After submitting the phase start forms, the IBM Acquisition Phase will appear as illustrated below. AT&T Acquisitions Phases and Steps appear as they have in the past.

IBM Acquisition Phase: Hardware Relocation (9)		Phase Started: Feb 4 2001 8:00AM				Accrued Time
1: RCW# Request Input	Y			Unknown UnKnown	IBM Asset Mgt	UPDATE
2: RCW# Request Approved	Y			Unknown UnKnown	IBM Order Mgt	UPDATE
3: P.O. to Vendor	Y			Unknown UnKnown	IBM Order Mgt	UPDATE

After all of the IBM Acquisition Phase Steps have been completed successfully, the IBM Acquisition Clock stops, and the IBM Vendor Dates panel appears in the Project Summary window below the IBM Acquisition Phase. As illustrated below, this panel displays the Purchase Order numbers defined in the Project, the date the PO was issued, the IBM Vendor Estimated Ship and Delivery Dates, and the IBM Vendor Committed Ship and Delivery Dates. These dates will be provided by the IBM Order Management group.

| Purchase Order Numbers and Ship & Delivery Dates | | | | | |
| Purchase Order | | Vendor Estimated Dates `UPDATE` | | Vendor Committed Dates `UPDATE` | |
Numbers	Issued	Ship	Delivery	Ship	Delivery
po1test1	02/01/2001	04/01/2001	05/01/2001	03/01/2001	04/01/2001
po2test1	02/01/2001	04/01/2001	05/01/2001	03/01/2001	04/01/2001
po3test1	02/01/2001	04/01/2001	05/01/2001	03/01/2001	04/01/2001

Automated Email Notifications Enhancements

The new Automated Email Notifications were added to inform the next step's group that the previous step has completed and the next step is ready to begin. This is an important new feature to help communicate a Project's progress and provide easy access to the Project being updated. Currently, this feature is available only in the IBM Procurement Planning and IBM Acquisition Phases. In the future, these automated emails may be added to other DBOR Phases and Steps.

Benefit

Because there are several groups involved in updating seven IBM Procurement Planning Phase Steps and three IBM Acquisition Phase Steps, the automated email notifications provides the next step owner with an indication of actions that need to occur to continue forward in the process. In addition, there are notifications when the Project has exception conditions that need to be addressed. For instance, should the dual quote threshold decision change the purchase path from IBM to AT&T, an automated email is distributed to the necessary groups to inform them that this exception has occurred.

Another benefit of the automated email notification is that from within the body of the email, the user can click on a web address that takes the user directly to the Project in DBOR. This benefit reduces the number of keystrokes and mouse clicks normally required to access a Project. After clicking on the web address, the Project will appear in the user's browser window where the Project Step can be updated or reviewed. This feature does not replace the existing DBOR Query functions; user can still access Projects via the DBOR query web pages.

Impact

Users will recognize an additional web page when submitting updates to the IBM Procurement Planning Phase or IBM Acquisition Phase Steps. This email form appears ready-to-send – the user can press send without any modifications. Nevertheless, this email form allows the user to type any additional information such as additional email recipients or comments in the body of the email message before sending it.

Action

The email notifications are automatically displayed in certain circumstances after the user presses the submit button on an IBM Procurement Planning Phase or IBM Acquisition Phase Step. As in the illustration below, after the automated email notification form appears, the user can type in additional information then press the send button. After the email is sent, the user will return back to the Project Summary web page.

Authorized Step Update Permissions Enhancements

To provide security in the IBM Procurement Planning and IBM Acquisition Phases, authorized groups of users have been given permissions to update specific steps. These permissions have been defined in DBOR as illustrated in the following table and the roles tables have been updated to include the new IBM roles: IBM Acquisition Management, IBM Finance, IBM Asset Management, and IBM Order Management.

Step #	Description	Initiative Manager	IBM Acq.Mgt.	IBM Finance	AT&T SMD	AT&T Acq.Mgt.	IBM Asset Mgt.	IBM Order Mgt
IBM Procurement Planning Phase								
N/A	Start Phase	X						
N/A	Reject Phase		X					
1	Acquisition Prerequisite Compliance		X	X			X	X
2	Obtain IBM Vendor Quote		X	X			X	X
3	Review Quotes for Better Price				X			
4	Calculate IBM Pricing			X				
5	Obtain AT&T BOU Approval/Reject					X		
6	Obtain AT&T Gov Approval/Reject					X		
7	Obtain AATP-B Form						X	
IBM Acquisition Phase								
N/A	Start Phase						X	
N/A	Reject Phase						X	
1	RCW Number Request Input						X	
2	RCW Number Request Approval							X
3	Purchase Order to Vendor							X
Project Level Updates								
N/A	Vendor Estimated Dates Update Form							X
N/A	Vendor Committed Dates Input Form							X

Benefit

Only those authorized individuals with active UGD IDs will be allowed to update IBM Procurement Planning Phase and IBM Acquisition Phase Steps.

Impact

In certain circumstances, the user's browser may require that the user input his/her Domain, UGD ID, and password when attempting to update a step. In these instances, the user must simply type in his/her AT&T Domain name followed by the backslash character ("\") followed by the associated UGD ID into the User Name field and then enter the user's password as illustrated below.

Action

All IBM Procurement Planning Phase and IBM Acquisition Phase users must confirm that they have an active AT&T Unified Global Domain IDs and password.

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Automated Process Controls Enhancements

The new Automated Process Controls are embedded within the IBM Procurement Planning and IBM Acquisition Phases and Steps. These controls determine the next procedural step as defined by the NCOS process relative to DBOR. In addition, these Process Controls record exception cases so that if process changes should be necessary, DBOR can be queried to see how many exception cases occurred. For instance, when a dual quote analysis is required because a single quote exceeds the contract requirements, DBOR will automatically determine that the next step is the IBM Procurement Planning Phase Step #3 for AT&T Supplier Management quote evaluation. In a majority of the threshold amount cases, Step #3 is not required and DBOR determines the next step is to calculate the IBM Pricing – IBM Procurement Planning Phase Step #4. For more information on these new Release 2.3.0 Process Controls, please click on the following document name for your review (**Warning: Large File Size**): DCR00018 Addendum.

Benefit
Allows DBOR to assist with the definition and communication of the next step in the IBM Procurement Planning Phase and/or IBM Acquisition Phase Steps.

Impact
All users must confirm the accuracy of the data input into the web pages so that the Process Controls and Automated Email Notifications operate as designed. For instance, in IBM Procurement Planning Phase Step #2, the users must select the accurate *single* quote values relative to the Prerequisite Information Package (PIP). These values will define whether the next step in the DBOR process is Step #3 or Step #4 and the email notifications associated with those steps.

Action
Confirm the user desk procedures are defined to ensure the accuracy of the data being submitted into IBM Procurement Planning Phase and/or IBM Acquisition Phase Steps.

IBM Procurement Planning Phase Process Flow

IBM Acquisition Phase Process Flow
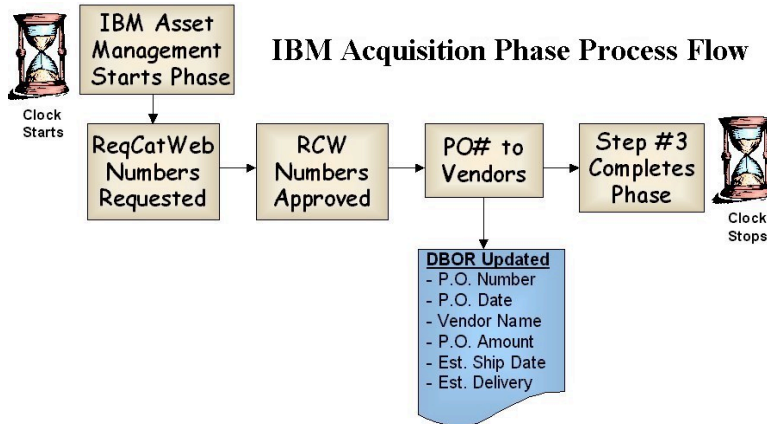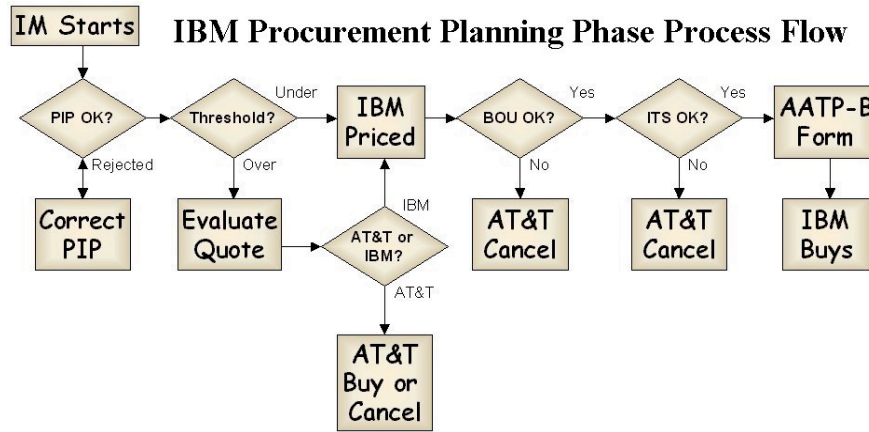
New IBM Implementation Phase Step #2

In addition to the existing steps in the Implementation Phase, a new Step #2 has been inserted to collect the product's Actual Delivery Dates (MOJ = Materials On Job). The user updates this step after the Purchase Order has been issued and all Vendor Committed Dates have been populated. This step applies only to Projects with the Purchase Path defined as IBM.

Benefit

Allows the user to record contract metrics information for reporting purposes.

Impact

The user must update this step to complete the project.

Action

After the IBM Acquisition Phase Step #3 has been completed and all Vendor Committed Dates have been populated, the user presses the Update button on the Project Summary window to open this step and update the Actual Delivery Dates. Each Purchase Order and Vendor Name associated with the acquisition will appear similar to the illustration below. All fields must be populated to complete this step.

Revised AT&T Acquisition Phase Step #5

To allow AT&T to record all Purchase Orders issued on a project, the AT&T Acquisition Phase Step #5 has been revised to support up to 10 Purchase Order Numbers.

Benefit

Allows user to record all Purchase Order Numbers, Vendor Names, and Dates Issued for reporting. These will also appear in the Status Messages at the bottom of the Project Summary web page.

Impact

The user must input all Purchase Order information to complete the AT&T Acquisition Phase Step #5.

Action

Each PO field on a single row must be input to submit record into DBOR.

AT&T or IBM Project State of Hold Enhancement

To identify the company who decides to place a DBOR Project in the State of Hold, a new field has been added to indicate AT&T or IBM.

Impact

Projects in a State of Hold appearing in future reports will include an indication of either AT&T or IBM Hold States. All existing DBOR Projects in a State of Hold will be defaulted to IBM Hold after release into production.

Action

When setting a DBOR Project in a State of Hold, the user must select either AT&T or IBM option as illustrated below:

ADD STATUS FORM

NCOS PROJECT ID : NCI20010024 (2720) (SRT System Test)

NOTE: Hit your back button to return to Project Summary without adding Status State, Desired Date, and Committment Date will be updated in the PROJECT from this screen

State: Hold — Hold — Select one if State is Hold ○ IBM Hold ⦿ AT&T Hold ○ (state not Hold)

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