D3 Kick Off

Feb 2024
David Rimmer (GTRI – ESD)

Background

D1 – Exchange Agreements. Released 9/1/2022

D2 – Contract Management full support for OSP Proposal and Award processing. Same underlying CA/CADM tables structures used but data sourced from Deltek CM. Released 8/11/2023

D3… next slide

D3 Key Deliverables

- **New Sub Agreement Management Module**

  Possible Solutions are Deltek CM, Workday, Other Vendor, Build in house

  OIT will help in discovery and solutioning

  Focus group will perform fit gap analysis

- **Retire CIS**

  Incorporate features into eRouting

  Possible workday interface impacts to be considered

  Ad-hoc reporting move to eRouting

- **Redesign/Retire CA/CADM model**

  Migrate all apps that use CA and CADM to the new model.

  OIT will heavily partner with GTRI for the new design

  OIT will partner with GTRI as we bring the data into the EDW, support the reporting, and integrations providing data to other systems.

  GTRI will be responsible for the build.

  OIT will make changes to LITE reports.

- **New Reports**

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D3 Key Deliverables

- **Process optimizations – pain point solutions**

  A D3 sub project will be executed that will look at business processes improvements that could be solved by out of the box functionality not implemented in D2 but available now from within Deltek CM core functionality.

- **New Teaming Agreements Module**

  A D3 sub project will be executed that will look at replacing the current Teaming Agreement system.

  NOTE: As of 1/31/2024 resource planning is in progress to determine when this could start.

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What is not in D3

- Enhancements to eRouting and Deltek CM

   Separate releases are planned for December 2023, Spring 2024 and Summer 2024 . It is planned for seasonal releases going forward – these are subject to other business events e.g Upgrades to CP base product to version 8.2 and beyond

- Document Management

   No intention for DataMagine to be replaced as part of D3, The latest version of DataMagine will be

   integrated in eRouting when CIS is migrated, but no plans in D3 to replace DataMagine product

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D3 Customers

GTRI

RI

OSP

OIT

Grants and Contracts

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D3 Release Plan

Release 3.1

New Subagreement module

Release 3.2

Migrate CIS to eRouting

Release 3.3

New data model

Conversion of all downstream systems to use new data model

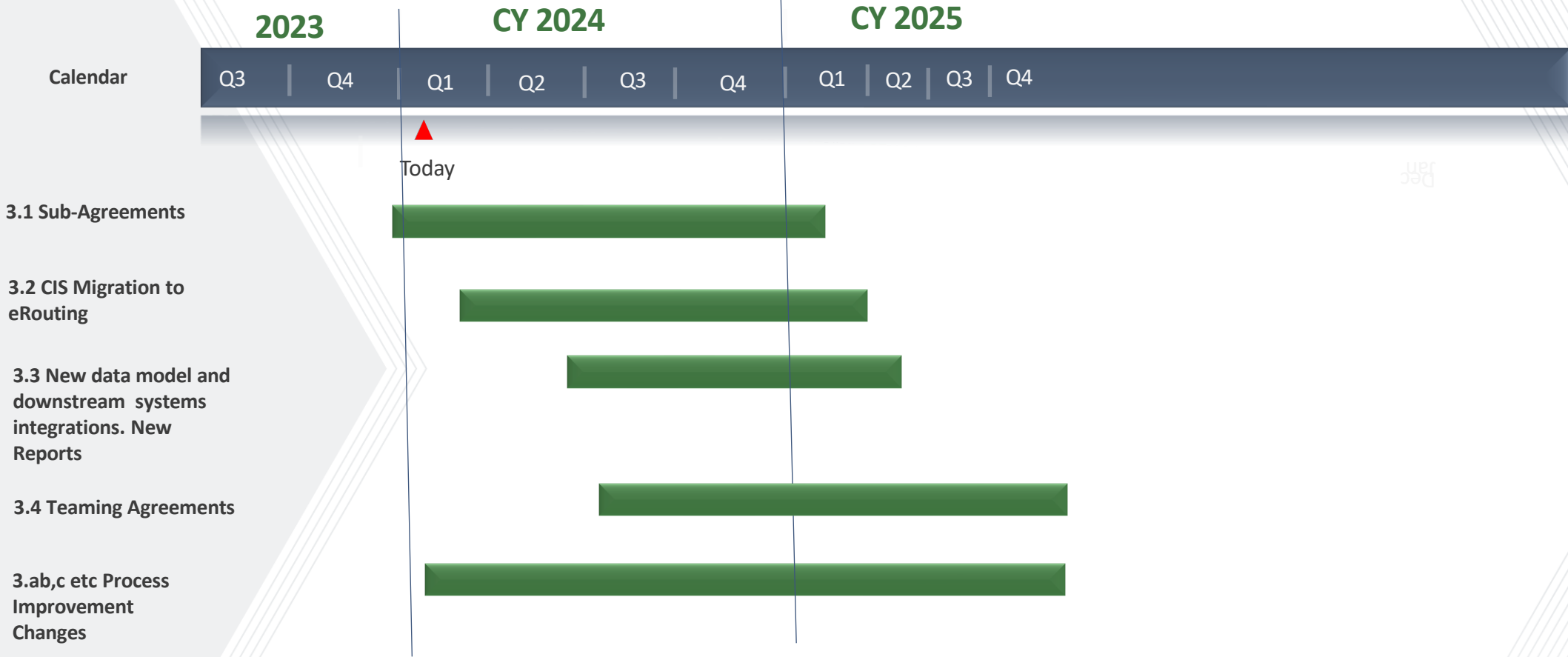New Reports

Release 3.4

Teaming Agreement module (In discussion)

D3 Release Plan

Release 3.a, b, c

Business Process optimizations enhancements solutions as we find them and solve them

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D3 Timeline

D3 Project People

Role	Names	
Executive Sponsors	Cindy Hope(OSP) Kim Toatley(GTRI FRA)	
Stakeholders	Chris D'Urbano (OSP) Gary LaRue (GTRI SPS) OIT EDW Steve Pilcher(OSP)	
PM	David Rimmer (GTRI ESD)	
Product Owners	Kadean Khan (OSP), Tamika Griffin (GTRI SPS), Chris D'Urbano(OSP)	
Change Management	Deanne Hendrickson(OSP) Penny Soteres(GTRI PMO)	
OIT Project Coordinator	David Thomas	
Technical Coordinator	Sudagar Sundaram (GTRI ESD)	

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D3 Sub Agreement Solution Team

Name	Role
Steve Pilcher (OSP)	Solution Lead
Victoria Custodio (OSP)	SME (RI)
Kadean Khan (OSP)	Product Owner
Zubaida (Zee) Azam (GTRI ESD)	Senior BA
David Rimmer (GTRI ESD)	PM
Gary LaRue (GTRI SPS)	Solution Lead
Cindy Mejia (GTRI SPS)	SME (GTRI)
Tamika Griffin (GTRI SPS)	Product Owner
Nate Watkins (OIT EAD)	Workday Business Processes SME
Chris D'Urbano (OSP)	Oversight
David Thomas (OIT)	Coordination

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D3 CIS Solution Team

Name	Role
Sudagar Sundaram (GTRI ESD)	Technical Lead
Chris D'Urbano	SME & Coordinator with other OSP SME's
Chris D'Urbano (OSP)	Product Owner
Sharon Zunt (GTRI ESD)	Senior BA
David Rimmer (GTRI ESD)	PM and BA
Gary LaRue (GTRI SPS)	Solution Lead
Tamika Griffin(GTRI SPS)	Product Owner
New Hire (GTRI ESD)	BA
Stephanie Barber(GTRI ESD)	UI/UX Designer
David Thomas (OIT)	Coordination

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D3 Data Model Solution Team

Name	Role
Sumathi Harihar(GTRI-ESD)	Technical Lead
TBD (EDW)	Technical Lead
Brent O'Guin (OIT)	Data Architect and Tech Strategy)
Pat Head (OSP)	Data Architect
Nick Chaviano (OIT)	Data Services
TBD	ETL Developer
David Rimmer	PM
Tamika Griffin (GTRI SPS)	Product Owner
David Thomas (OIT)	Coordination

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D3 Business Process Optimization Solution Team

Name	Role
Kadean Khan (OSP)	Problem Analysis
Lura Birge (OSP)	Technical Solution Option Analysis
David Rimmer (GTRI ESD)	PM and BA
Tamika Griffin(GTRI SPS)	Product Owner
New Hire (GTRI ESD)	BA
David Thomas (OIT)	Coordination

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D3 Teaming Agreements Solution Team

Name	Role
TBD	

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D3 Status Reporting

The current OSP site https://osp.gatech.edu/contract-management-project is being updated to reflect the D3 project details and regular bi-weekly status reports will be posted on that site

Contract Management Project

Our new Contract Management System is LIVE !

As of Aug 14th, Contracting Officers and other OSP Points of Contact will have a more modern and efficient Contract Management System. Please be patient as we are still learning our new system & processes while continuing to provide you with contract management services.

How will this impact you? D2 Impacted User Groups (PDF)

Help Desks: to submit your questions, request assistance, and/or report an issue

1. For OSP users cm-support@gtri.gatech.edu

2. For Non OSP users erouting-support@gtri.gatech.edu or esd-support@gtri.gatech.edu

The OSP user will use Contract Management in Costpoint to execute all contract management business processes. These business processes will interface with eRouting.

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D3 Risks

This is an enterprise project with many levels of complexity. It will require skilled and continuous focused dedicated project management oversight.

We also need to ensure that we have the best skilled talent for the new model designs

If decision is made to not use Workday, Deltek CM or a 3rd party product for the subagreement module then the plan needs to be adjusted to support resource allocations to build out a solution

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D3 Ground Rules

- Daily Standups to resolve any blockers and tag up on progress – these will be quick
- 2 week sprints – Dave to plan these
- Open communication
- ESD team charge time to project code (L2216.0R.0P.03.0006)
- Infrastructure work should be charge to G or C number – this applies to SWAT and Balaji WS work. Dave R will advise
- Everyone owns this delivery. Support each other, back each other up.
- Things will change we will adapt to this and manage it.
- Still many unknows

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D3 Next Steps

- Finish wiki setup
- Contact sub project teams
- Complete detailed tasks planning
- Scrum board setup
- Engage

D3 Questions