



# PROCURE-TO-PAY

## TRAINING SYMPOSIUM 2019

Orlando

# Surviving Data Transition from SPS

Presented by: SAF/AQCI

April 24, 2019

# Agenda

- AF CON-IT
- Deployment Strategy
- Site Readiness
- Data Migration
- Success

# AF CON-IT



## CON-IT developed and based on DPC mandated standards

- Ensures accurate and complete data per the standard
- Integration with financial systems across the enterprise



## Standardize P2P processing from inception to closeout

- Enables end-to-end alignment of business process and data
- Traceability throughout the acquisition life cycle



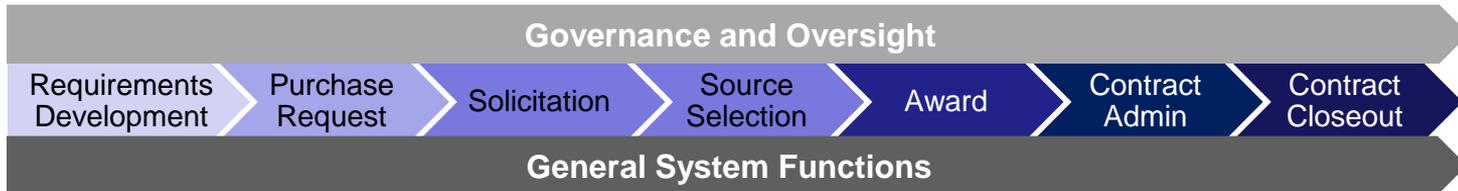
## Clause Logic Service will allow for consistent clause inclusion

- Increase communication between authoritative source and practitioners
- Improve efficiency of the end-to-end clause logic management life cycle



## Centralize Information/Business Intelligence / Transparency

- Cut 230+ instances to one centrally managed environment
- Timely/reliable data for decision makers



# Deployment Strategy

EARLY ADOPTERS	LIMITED DEPLOYMENT	FULL DEPLOYMENT
1 SITE	8 SITES	96 SITES
<ul style="list-style-type: none"> <li>➤ Site Lead Symposium</li> <li>➤ Town Hall</li> <li>➤ Follow-up Calls</li> <li>➤ White Glove Team</li> </ul> <div data-bbox="117 727 622 803" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <ul style="list-style-type: none"> <li>➤ = Added OCM</li> <li>✓ = Continued OCM</li> </ul> </div>	<ul style="list-style-type: none"> <li>➤ MAJCOM Road Show</li> <li>➤ FRB Strategy Sessions</li> <li>➤ Familiarization Events</li> <li>➤ Site Surveys</li> <li>➤ Site Training Lead Telecoms</li> <li>➤ Site Readiness Telecoms</li> <li>➤ Post-Deployment Site Visit</li> <li>➤ Rapid Improvement Event</li> <li>➤ Weekly FRB Telecoms</li> <li>➤ Early Capability Assessment</li> <li>✓ Town Halls</li> <li>✓ White Glove Teams</li> </ul>	<ul style="list-style-type: none"> <li>➤ Weekly Newsletter</li> <li>➤ Email Deployment Updates</li> <li>➤ Improved SharePoint Site</li> <li>➤ Monthly Super User Telecoms</li> <li>➤ Weekly Q&amp;A Telecoms</li> <li>✓ FRB Strategy Sessions</li> <li>✓ Familiarization Events</li> <li>✓ Site Surveys</li> <li>✓ Site Training Lead Telecoms</li> <li>✓ Site Readiness Telecoms</li> <li>✓ Post-Deployment Site Visits</li> <li>✓ Weekly FRB Telecoms</li> <li>✓ Strategic White Glove Teams</li> </ul>

## ORGANIZATIONAL CHANGE MANAGEMENT

Site sequence was assessed against **mission need**, anticipated delivery of **capability**, number of **users**, Procurement Data Standard compliance rate, data migration magnitude, and **leadership** input

# **SITE READINESS**

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# milBook



Easy to identify “hot topics”

The Migration Info, Tips & Tricks project is where you can learn more about the tasks and tools that are needed to successfully

more about the tasks and tools that are needed to successfully migrate your sites contracts to CON-IT.

Owned by:  
William Woods

Tags:  
con-it

Created:  
May 11, 2017

#### FEATURED CONTENT

- SPS Special Characters Issue “Mostly” Resolved for PDS XML
- Script to Identify Master BPA PoP & Migration Status
- PDS\_Validation\_Result\_v2.pdf
- SPS Not Closed Out Report Replaced by EZQuery.pdf

Highlight important documents



#### INFO, TIPS & TRICKS

##### Files to Provide when Requesting PDS Validation Support

When requesting PDS validation analysis support from the Gunter SPS Help Desk you will need to provide a few files. BOTH the PDS XML that was sent for validation AND the PDS validation results will be needed for evaluation of the problem. These files are on the Adapter server and should be obtained from the site SPS System Administrator, the location of the files depends on whether the validation was for Pre-Validation or for the conformed contract validation:

##### Pre-Validation (PDS Approval Sheet in SPS):

1. PDS XML sent to validation service
  - Appropriate dated folder located at: D:\spsi\EDA\PDSPVal
2. PDS Validation Results
  - Appropriate dated folder located at: D:\spsi\Incoming\PDSPVal\ezquery
3. Print Preview Word document from SPS for the contract action (Only if Requested)
  - Right click on action in SPS and select print preview for the action (do not select conformed)

##### PDSCAU (Conformed Contract PDS Validation):

1. PDS XML sent to validation service
  - Appropriate dated folder located at: D:\spsi\PDSCAUDrive\pds\Archive
2. PDS Validation Results
  - Appropriate dated folder located at: D:\spsi\PDSCAUDrive\pds\EZQuery
3. Print Preview Word document from SPS for the contract (Only if Requested)
  - Right click on basic PIID of the contract in SPS and select print preview for conformed contract

Note: The directories provided are for sites configured for a single database configuration, contact the Gunter SPS Help Desk if your site is configured for supporting multiple databases.

##### Evaluating PDS Validation Results

Used milBook for CON-IT announcements, polls, guidance, and tracking during pre-deployment

In-depth guidance provided to ensure successful migration

# SharePoint

Site Readiness Dashboard

Communications

Training and Reference

User Accounts

Help Desk Information

Feedback/Questions

Functional Capability



HOME FUNCTIONAL CAPABILITY MAUCOM ROLLUP DASHBOARD READINESS DASHBOARD COMMUNICATIONS TRAINING AND REFERENCE COMMUNITY HUB ADMIN DD 2875 (CON-IT)

FUNCTIONAL REQUIREMENTS BOARD HELP DESK FEEDBACK/QUESTIONS

EDIT LINKS



External References

E-Business  
Procedures and  
Guidance

Legacy Links

AOCI Internal Docs

Change

Management

Library Menu

01. Site User Guide 03. CLS 04. CON-IT Operating References 05. User Journeys  
06. CON IT Training Videos 07. Train the Trainer Materials 08. Training Resources  
12. Contacts 14. Account Maintenance

01. Site User Guide

Admin Menu

[Add new training document](#)

[Add new training link reference](#)

# Site Readiness Dashboard

- All operational contracting sites tracked readiness activities using a dashboard
- Due dates based on deployment date (i.e., deployment date-minus 30 days)
- Air Force and MAJCOM provided summary level visibility (drill down to site view)

MAJCOM/DRU	Contracting Unit	Item #	Event	Task	OPR	Lockout of SPS	"T." Days	Suspense	Date Completed	Status	Comments
✓ AFICA	AFICA/KD Offutt	1	Pre-Activation	Monitor PDS Compliance of migrating contracts using EZQuery CON-IT PDS Conformed Validation report (Performed Weekly up to T-2) 1). Resolve PDS compliance issues 2). Process new migrating actions and "Missing" through ROSCAU 3). Notify Gunter Help Desk if migrating contract does NOT generate a Conformed PDS XML A comment is required weekly on the date this was last completed.	Site Lead	12/12/2018		-00 09/13/2018	Pending	Yellow	
✓ AFICA	AFICA/KD Offutt	2	Pre-Activation	Run "Verify XML Action (Dashboard)" Report on EZQuery (SPS Sys Admin) (Performed Weekly up to migration) 1). Resolve any missing XML by Resubmitting using My webMethods 2). If action not available to resubmit with My webMethods then reflag action by using Script Aid "Adapter Reflag" function A comment is required weekly on the date this was last completed.	Site Lead	12/12/2018		-00 09/13/2018	Pending	Yellow	
✓ AFICA	AFICA/KD Offutt	3	Pre-Activation	STL identifies and secures designated facilities and materials for on-site training. Add in the remark section where the training will be and what dates you intend to train your users.	STL	12/12/2018		-85 09/18/2018	Pending	Red	
✓ AFICA	AFICA/KD Offutt	4	Pre-Activation	Site confirms that they had at least one person attend the Train the Trainer. Provide the name/names of individuals that attended and the dates they attended.	Site Lead	12/12/2018		-81 09/22/2018	Pending	Red	
✓ AFICA	AFICA/KD Offutt	5	Pre-Activation	Training Leads provide their Training Plan to their FRB for Review no later than Sept. 1st.	STL	12/12/2018		-80 09/23/2018	Pending	Red	
✓ AFICA	AFICA/KD Offutt	6	Pre-Activation	DD 2575s are no longer required. Ensure all of your folks have a PIEE Account.	Site Lead	12/12/2018		-05 10/08/2018	Pending	Yellow	
✓ AFICA	AFICA/KD Offutt	7	Pre-Activation	Each site will receive an email from their FRB on SPS Accounts to Migrate to CON-IT. Every user will need to provide their EDIRI in order to gain access to CON-IT through PIEE.	Site Lead	12/12/2018		-60 10/13/2018	10/01/2018	Green	
✓ AFICA	AFICA/KD Offutt	8	Pre-Activation	Confirm Migrating Contracts lists Identifies contracts migrating to CON-IT (Performed weekly, continue up to T-2) 1). Review/update EZQuery CON-IT SPS Contracts report. Work with EZQuery for resolution of anomalies 2). Review EZQuery CON-IT Manual Contracts report A comment is required weekly on the date this was last completed.	Site Lead	12/12/2018		-46 10/27/2018	Pending	Yellow	
✓ AFICA	AFICA/KD Offutt	9	Pre-Activation	Direct users to the CON MOD SharePoint site to learn about the unique unit roles and system roles needed for the operational contracting unit using CON-IT. This is found under the Training and Reference Tab. CON-IT migration references.	Site Lead	12/12/2018		-46 10/27/2018	Pending	Red	
✓ AFICA	AFICA/KD Offutt	10	Pre-Activation	Identify migrating Contracts that cannot pass PDS Conformed Validation	Site Lead	12/12/2018		-39 11/03/2018	Pending	Red	

▪ Status: Color Coded (red/yellow/green)  
 ▪ Comments Section  
 ▪ Detailed Guidelines/Manuals

# DATA MIGRATION

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# Data Migration & Leveraging PDS

## DPC Procurement Data Standard (PDS)

- Mandatory for Current and Future Systems
- Compliance with PDS allows Compatibility Between Systems
- PDS Compliant SPS Contracts were Migrated into CON-IT

### Standard Procurement System

Contract  
Identified for  
Migration



PDS  
Compliant  
**Conformed**  
Contract



### CON-IT

Consumes  
PDS  
Compliant  
Conformed  
Contract



Continue with  
Contract  
Administration

AF leveraged the PDS mandate to facilitate our migration into CON-IT

# Defining the Scope of Migration

## What to Migrate

### Active Contracts

Conformed Contracts  
Only



### Unreleased Awards



### Solicitations

Released Active Solicitation  
not yet Awarded



### Open Purchase Requests

Not Used on a Released  
Contract Action



## What Not to Migrate

Unreleased  
Modifications/Amendments  
(AF CON-IT Limitation)

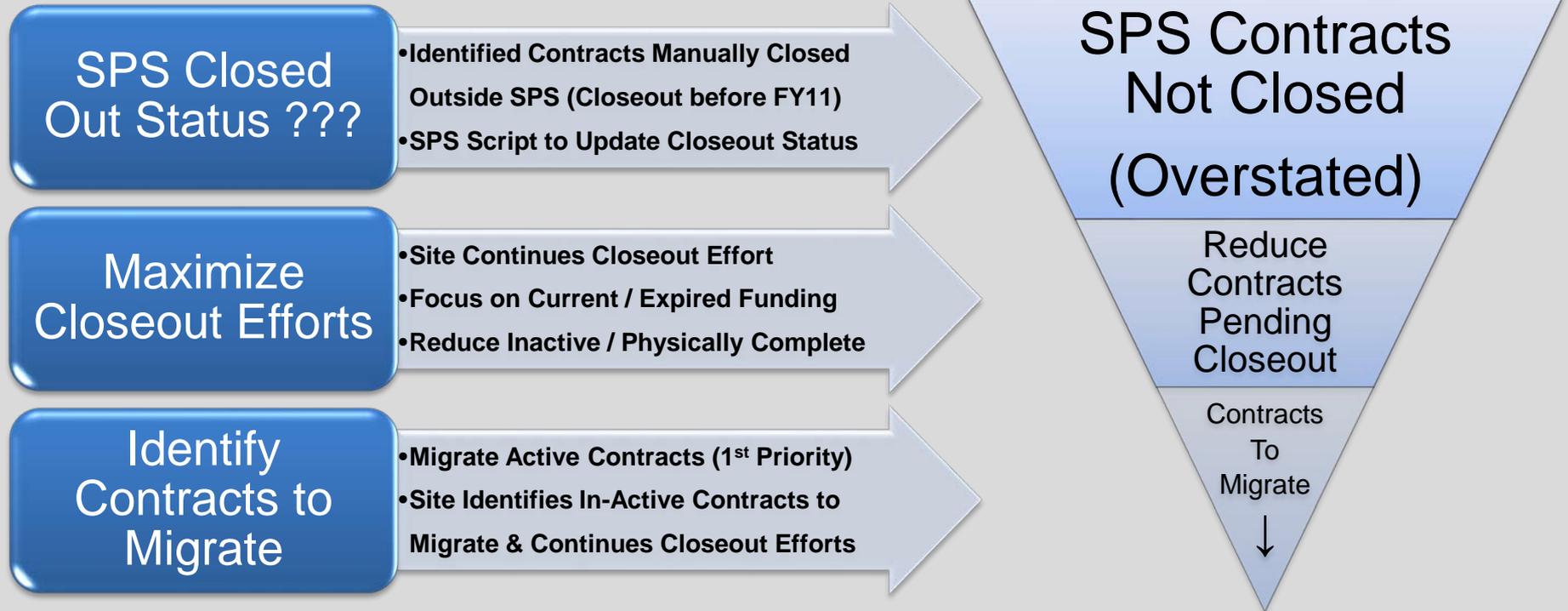


### Challenge

Active Contract Identification & PDS Compliance

- Reports: What's Active & Not, What's Closed Out
- Evaluating PDS Compliance

# Pre-Migration: SPS & Contract Closeout



# Migrating Contracts PDS Compliance Rate

## Migrating Contracts Conformed Contract PDS Validation

MAJCOM	Site / Base	Conformed PDS Award Number	Validation Date	Validation Result	Migration Status	Current SPS Contracts Award Number for Outdated/Missing PDS	KO	Comments
AFSPC	FA2816 / LAAFB	FA8732-14-D-0010-MG0102	12/12/2018 9:18:35 PM	Passed	Active Contract		Alan Mak	PoP ends 04/30/2021
AFSPC	FA2816 / LAAFB	FA8732-14-D-0005-MG0405	12/12/2018 9:18:35 PM	Passed	Active Contract		Alan Mak	POP ends 11/30/2016 READY FOR CLOSURE Award amount = \$602,650.87 Total Payments Made = \$581,079.58
AFSPC	FA2816 / LAAFB	FA8732-13-D-0029-MG006	6/13/2017 6:50:11 PM	Passed	Active Contract		DALICE VA	POP ends 11/10/2018
AFSPC	FA2816 / LAAFB	FA8732-13-D-0028-MG19	6/13/2017 6:50:11 PM	Passed	Active Contract		DALICE VA	PoP ends 5/10/2019
AFSPC	FA2816 / LAAFB	FA8732-13-D-0028-MG1101	7/26/2018 8:59:51 PM	Passed	Active Contract		Alan Mak	POP ends 03/27/2021
AFSPC	FA2816 / LAAFB	FA8732-13-D-0028-MG0802	6/13/2017 6:50:11 PM	Passed	Active Contract		DALICE VA	POP ends 01/04/2020
AFSPC	FA2816 / LAAFB	FA8053-12-D-0034-MG1005	12/13/2018 6:58:20 PM	Passed	Active Contract		DALICE VA	PoP ends 3/31/2019
AFSPC	FA2816 / LAAFB	FA8053-12-D-0034-MG0903	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	PoP ends 03/27/2019
AFSPC	FA2816 / LAAFB	FA8053-12-D-0027-MG1204	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	PoP ends 11/13/2018
AFSPC	FA2816 / LAAFB	FA8053-12-D-0027-MG0904	12/12/2018 9:18:35 PM	Errors	Active Contract		DALICE VA	PoP ends 12/25/2018
AFSPC	FA2816 / LAAFB	FA8053-12-D-0027-MG0805	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	PoP ends 03/31/2019
AFSPC	FA2816 / LAAFB	FA8053-12-D-0023-MG1403	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	PoP ends 5/30/2018
AFSPC	FA2816 / LAAFB	FA8053-12-D-0023-MG1204	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	PoP ends 03/31/2019
AFSPC	FA2816 / LAAFB	FA8053-12-D-0023-MG1105	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	PoP ends 03/31/2019
AFSPC	FA2816 / LAAFB	FA8053-12-D-0014-MG0105	12/12/2018 9:18:35 PM	Passed	Active Contract		DALICE VA	Pop ends 3/31/2019
AFSPC	FA2816 / LAAFB	FA281619P0001	12/12/2018 9:50:26 PM	Errors	Active Contract		DALICE VA	PoP ends 12/15/2018
AFSPC	FA2816 / LAAFB	FA281619F0009	11/30/2018 7:27:34 PM	Passed	Active Contract		DALICE VA	PoP ends 11/1/2019

MAJCOM	Site / Base	Migrating Contracts	Passed	Passed %	Errors	Errors %	Missing	Missing %	PDS Exempt
AFSPC	FA2816 / LAAFB	163	152	93.25%	11	6.75%	0	0	0
LAAFB	TOTAL	163	152	93.25%	11	6.75%	0	0	0

## Migration Identification

### Migrating Contracts

- List Managed in EZQuery
- Migration Status
- PDS Compliance

### Unreleased Awards

- Script During Migration Identifies Migrating Unreleased Awards

### Open Purchase Requests

- Site uses EZQuery to Identify Open PRs

### Migrating Solicitations

- SQL Script - Eligible for Migration
- Site Reviews/Updates List

#### Validated:

- No Duplicate PIDs
- No Discontinue BPA Masters
- No SPS External Contracts
- No Closed – Terminated – Cancelled
- DD 1594 Started – Not SPS Closed Out

## Create XML on Adapter

### Migrating Conformed Contracts List

- 1<sup>st</sup> xProc XML Extraction
- 2<sup>nd</sup> xProc to PDS XML Conversion

### Unreleased Awards (SQL Identified)

- 1<sup>st</sup> xProc XML Extraction
- 2<sup>nd</sup> xProc to PDS XML Conversion

### Open PR List

- xProc XML Extraction

### Migrating Solicitations List

- xProc XML Extraction

FTP'd XML Archived on Adapter

SPS Transferred Flag Set

Site Provides Migrated Data to Migration Team

## DLA-TS | GEX

sFTP  
to  
DLA-  
TS

PDS XML

- No Translation

PR xPROC

- Translate to PRDS XML

Solicitation  
xPROC

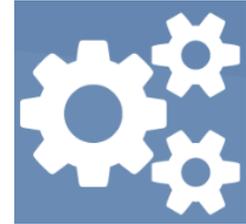
- Translate to PDS XML

CON-IT Pulled XML

CON-IT

# SPS Technical Requirements

- Adapter Server Fully Operational
- PDS Tools in SPS Critical to Data Migration
  - Pre-Validation Compliance before Release
  - SPS Convert Add Text Utility
    - Convert DB, then Maintain new Awards & Mods
  - PDS Conformed Award Utility (PDS CAU)
    - Send Conformed Contracts to PDS Validation service



# Challenges

- Business Processes
  - Identifying the Documents to Migrate
    - Web Based Tools were a Challenge
    - Knowledge/Experience/Site Unique Challenges
  - Nearly 100 Sites
    - Standardized but Challenges with PMO & Site Support
      - Knowledge/Experience with Adapter & Interfaces
    - SPS Sys Admins and Site Leads
      - Knowledge/Experience
- Development:
  - More thorough testing of post migrated contract administration

# Post Migration

- Additional PDS XML Extraction
  - 3 Days after Completion of Migration
    - Site Provided AF PMO Final DB Dump
    - Sites Shut Down SPS Operations
  - AF PMO Extracted Additional PDS XML
    - Criteria: Contracts Not Closed Out but Not Migrated
    - 200+ Contracts Migrated Post Migration

# SUCCESS!

	Contracts	Open PRs	Solicitations	Unreleased Award	Total All Documents	Total Sites Migrated
Migrated into CON-IT	38,005	2,532	384	371	41,292	100
Extracted from SPS	38,107	2,548	413	371	41,439	
Success Rate	99.73%	99.37%	92.98%	100.00%	99.65%	



# Procure-to-Pay

## Training Symposium

April 23 - April 25, 2019 • Hilton Lake Buena Vista - Florida

# **BACKUP SLIDES**

# Analysis - Compliance – Monitor

## Analysis – Compliance

### Closeout

- Maximize Closeout

### Contracts Identified for Migration

- Plan to Migrate All Active Contracts
- Identify Inactive Contracts to Migrate

### PDS Compliance

- Perform PDS Validations & Resolve
- Conformed Contract Mandatory

### Final Validations & Migrate Contracts

- Prior to Transmission Ensure Conformed Contract PDS Compliant

## Web Based Migration Dashboard



### Closeout Status Reports

- Closeout Status
- Closeout Progress (Actions)



### PDS Compliance Reports

- Pre & Post Award PDS Compliance
- Conformed Contract PDS Compliance
- Site Compliance Metrics

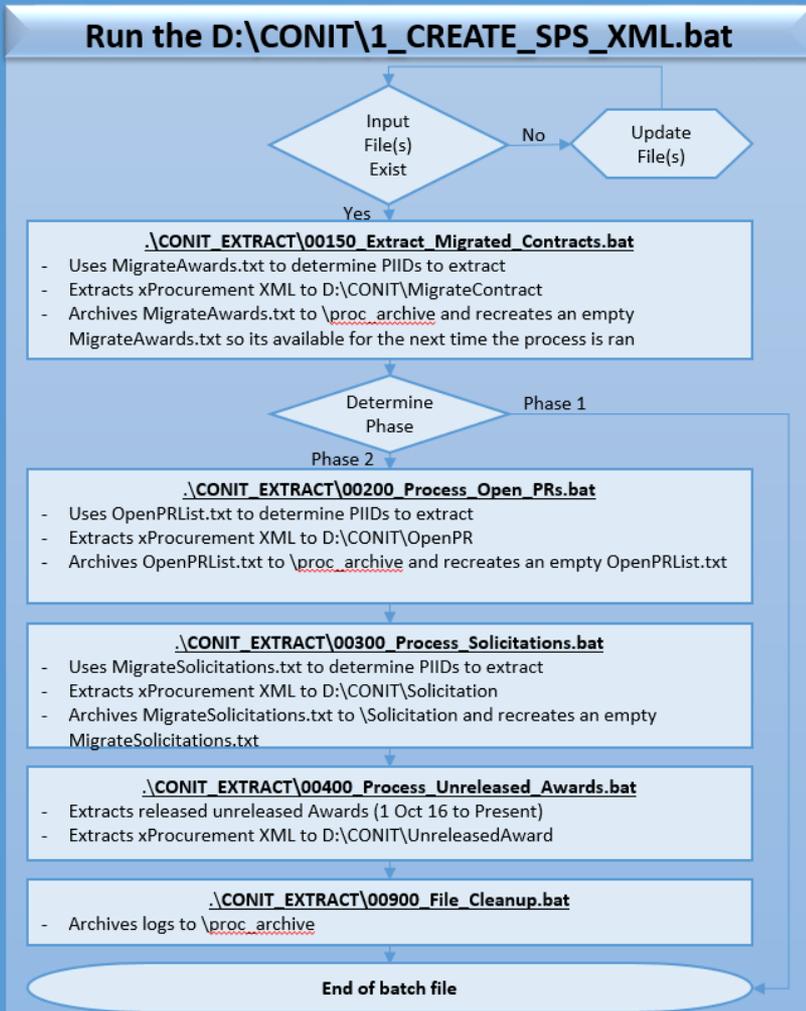


### Track Contracts for Migration

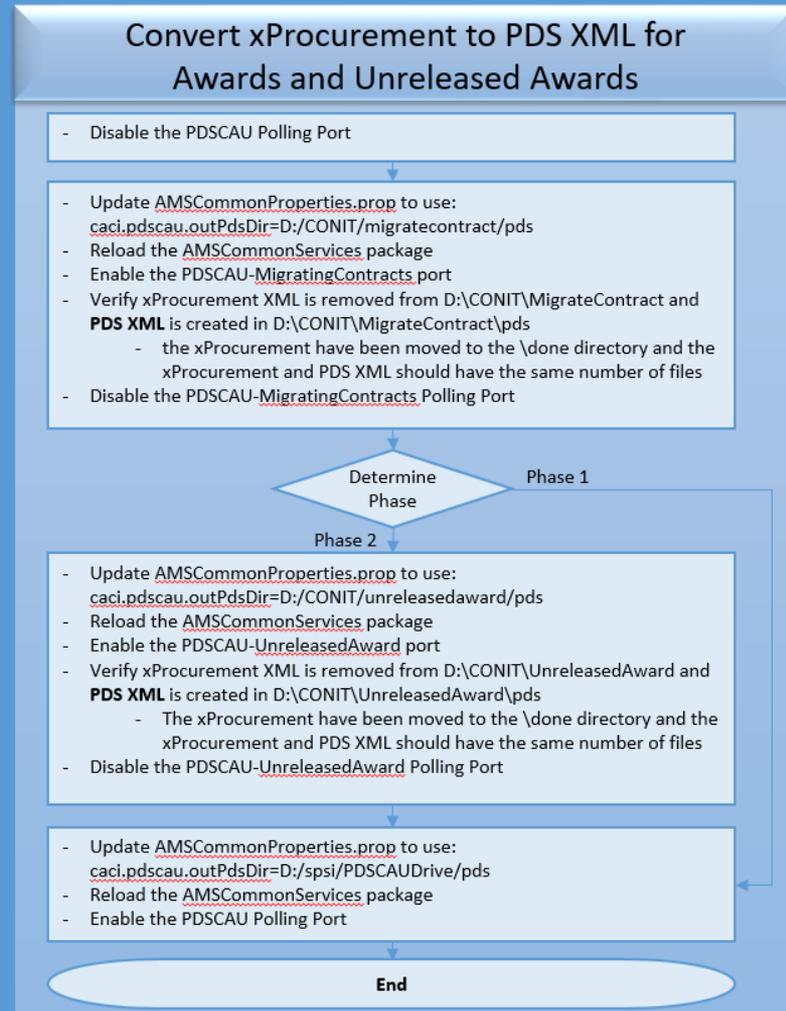
- Identify & Monitor Contracts to Migrate
- Conformed Contract Status (Dynamic)
- PDS Compliance Status

# 4.1.3 Extracting the Migrating SPS XML Data

## TASK 1 – Automated Process



## TASK 2 – Manual Process



# 4.2 Transmit to DLA-TS Extracted SPS XML Data

## Validate FTP Setup – Manual Process

### Verify **FTP2DLATS.scp** Configured Correctly

- USER – DLATS User Account (same as DEAMS [Inbound.scp](#))
- PASS – USER password (same as DEAMS [Inbound.scp](#))
  
- Ensure the .scp is using the sites DoDAAC (fa1234 was changed to the site DoDAAC – using the same as DEAMS [Inbound.scp](#))

Note: DLATS needs to have the following directories for the site:

[./CONIT/migratecontract](#)  
[./CONIT/openpr](#)  
[./CONIT/solicitation](#)  
[./CONIT/unreleasedaward](#)

### Verify **FTP2EZQuery.scp** Configured Correctly

- USER – EZQuery User Account (same as PDSVAL-[EZQuery.scp](#))
- PASS – USER password (same as PDSVAL-[EZQuery.scp](#))

### Verify **IPswitch WS\_FTP Profile**

- Ensure the account used to transmit the data to DLA-TS has the “DEAMS Inbound” and “EZQuery-FTP” setup in the users [IPswitch Profile \(ws\\_ftp.ini\)](#)
- If not using the local Admin (probably [dscs\\_admin](#)) then follow procedure to copy the [ws\\_ftp.ini](#) for the user account that will be performing the FTP

Done

## Run 2\_FTP\_SPS\_XML.bat – Automated Process

### Migrating Contracts PDS XML

- [FTP'd](#) to DLATS directory:
  - [./CONIT/migratecontract](#)
- [FTP'd](#) files are archived on the Adapter at:
  - [D:\CONIT\MigrateContract\\(\\_DBNAME\)\dated folder](#)

### Open PR xProcurement XML (Phase 2 Only)

- [FTP'd](#) to DLATS directory:
  - [./CONIT/openpr](#)
- [FTP'd](#) files are archived on the Adapter at:
  - [D:\CONIT\OpenPR\\(\\_DBNAME\)\dated folder](#)

### Solicitation xProcurement XML (Phase 2 Only)

- [FTP'd](#) to DLATS directory:
  - [./CONIT/solicitation](#)
- [FTP'd](#) files are archived on the Adapter at:
  - [D:\CONIT\Solicitation\\(\\_DBNAME\)\dated folder](#)

### Unreleased Awards PDS XML (Phase 2 Only)

- [FTP'd](#) to DLATS directory:
  - [./CONIT/unreleasedaward](#)
- [FTP'd](#) files are archived on the Adapter at:
  - [D:\CONIT\UnreleasedAward\\(\\_DBNAME\)\dated folder](#)

### EZQuery

- FTP to EZQuery a csv file listing actions that successfully [FTP'd](#) to DLA-TS
- EZQuery updates Migration State from “SPS Administration” to “Migration In-Progress”

### SPS Updated

- For each action [FTP'd](#) the Transferred Flag is set in SPS
- Includes all 4 types of actions (Migrating Contracts, Open PRs, Solicitations, Unreleased Awards)
- Prevents the action and all actions in the document chain from creating a new mod/amendment in SPS – they are also now read only
- [.\CONIT\\_EXTRACT\00500\\_Flag\\_Docs\\_as\\_Transferred.bat](#) performs the update