

“Virtual Library” for Procurement Documents

Background: Seminole County Government has utilized a computer network based financial software system, JD Edwards (JDE), since the latter part of 2004. In its migration to this new system, the County changed its procedures for providing information on procurement-related requests and had begun to use JDE for all records storage. Internal customers were trained to enter electronic requisitions for goods and services into JDE, and to attach supporting documents (scopes, drawings, justifications, etc.) via links to these requests. The requisition would contain all information required to process a procurement action, and once converted during this process to the final encumbrance (award) the system would retain all procurement documents from the requisition to the final award. Since JDE has limited access because of the costly licenses, the intent of this Best Practice was to allow full access to all procurement information from a single source (Intranet) through which all associated documentation and financial information could be found for each procurement action.

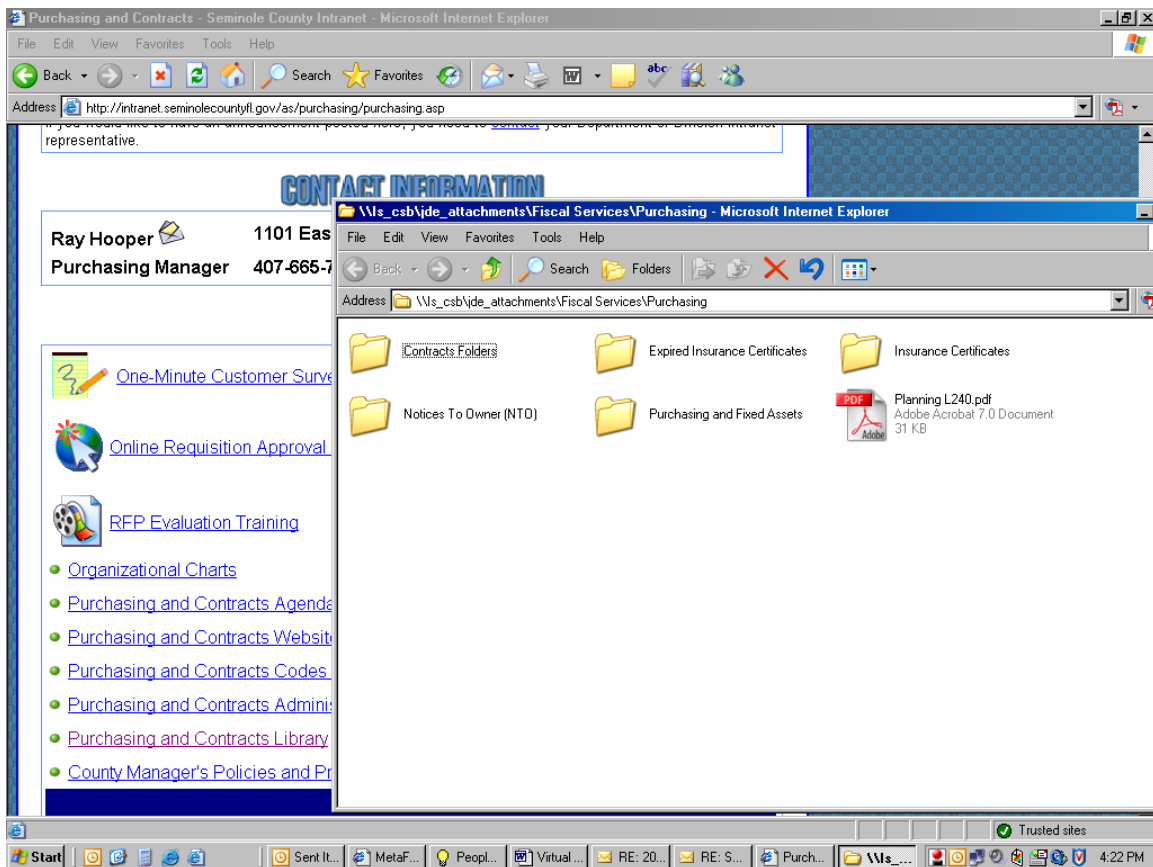
Tactics: A separate computer network drive (i.e. J) was required to host document attachments for JDE, and was created by the County’s Information Technology (IT) staff. IT also created department folders and gave network rights to department JDE users to create sub-folders that contained process documents such as sealed drawings and technical specifications. The J Drive is only accessible for County staff with access to JDE and while P&C has read/write access to all sub-folders on this drive, individual departments have those rights only for their own folders. As stated earlier, documents are attached to JDE request via links, and any movement or name change for either at the folder or file level will break the link and thus users will lose access to such information. Also, since Master Agreements are used by several departments, only the department that submitted the original request had access to view the documents.

In order to maintain the integrity of procurement requisitions, Purchasing and Contracts (P&C) staff had been required to locate the attached files through the link properties and to copy same into P&C’s J Drive folder. This action served to continue the intended use of JDE as a record keeper, but it did not satisfy the needs of any County user to view procurement information because most of the County’s employees do not have access to JDE. Therefore, P&C coordinated an approach focused on allowing network user accessibility to its own folders/files in a ‘Read Only’ view, access that was envisioned for all County staff. The final decision was to create a web-based link from the County’s Intranet to P&C’s folders on the J Drive, and to place the restriction for ‘read-only’ on that access point and not any single user. This authority by access point reduces IT’s involvement or any further need for IT services in updating users, etc. In addition, P&C can change the name or location of any of its own folders on the J Drive while maintaining the ‘read-only’ restriction. Internal customers can read and print files from the library, but can also copy a restricted version of these files to their own computers.

Cost: The time to develop the idea of the Virtual Library may have taken as many as 4 collective hours for P&C staff, and less than .5 hours for the IT staff to implement. The total estimated cost to implement based on 4.5 hours @ \$40.00 per hour was \$180.00.

Benefits: This innovation has created a more effective workplace that goes beyond the office by allowing all staff to view the most current procurement information to make informed decisions about their projects. This Best Practice has also created efficiency within department offices, where copies of executed contract actions are now at the fingertips of the users without any delay in inter-office mailing when the need for review is that moment and not tomorrow. This innovation allows for full view of all procurement documents whereby creating efficiencies in customer service and the ability for Program Managers to get information via the intranet without waiting for an analyst to respond. As a result of this Best Practice, the County saved approximately \$60,000.00 per year by eliminating the need for excess licenses for JDE.

View the screenshot: The functional capability of our Virtual Library has been provided to our internal County customers via the intranet, and can't be accessed from an external source. However, we've provided the following screen shots to demonstrate the capabilities for this new innovative process:



POC: Ray Hooper, CPCM
Purchasing and Contracts Manager
Seminole County Government
407-665-7111
rhooper@seminolecountyfl.gov