

# DMS Spiral 3 Innovation

MEETING THE UNIQUE NEEDS OF  
GOVERNMENT CUSTOMERS

## Introduction

Inseego's DMS SaaS Solution has specialized in meeting the complex telecom purchasing requirements of the government customer for over ten years and is proud to unveil the most innovative advancements to date for the U.S. federal government Spiral 3 contract. Spiral 3 is a \$200 billion open-source bid to serve the wireless and telecommunications services for the federal government. DMS's Spiral 3 functionality was developed to address the complex purchasing, management, and compliance requirements of the U.S. Navy. While our advancements allowed Tier One Wireless Carriers to qualify for this contract, the functionality can serve the needs of all federal, state, and local government agencies.

# Meeting the Unique Needs of Government Customers

Government customers use a formal requisition process with an accounting classification system to acquire products and services. Requests for purchases are put out in a Request for Quote (RFQ), and the vendor responds with a quote. Once that quote is approved by the government purchasing agent, a Task Order is provided that outlines the contractual requirements of the purchasing agreement. Not only is the workflow a multiple-part process that relies on gated approvals, but the government uses specific line-item accounting codes that do not match the vendor SKUs. Each government contract includes line items with unique numbers for each purchase. These line-item codes allow the administration to track the performance and service dates for each purchase; however, since the Carrier does not use the same classification system, it is extremely difficult for government accounting teams to reconcile their bill or for the purchasing agents to track their funding.

Each funding document also outlines a period of performance that specifies a start and end date for the available funds. It is not only important to know that funds are available but equally important to know when the funds expire. If funds are not used before the contract end date, the Carrier will not receive payment for orders after that date.

There are two types of government item numbers used in purchasing telecom expenses: Contract Line Item Numbers (CLINs) and Exhibit Line Item Numbers (ELINs). CLINs represent large bucket costs within the funding document, and ELINs are the subline items in the contract: for example, an agency could purchase a rate plan with a CLIN number and under that plan select an ELIN to choose a feature option. The ELIN provides additional choices within the CLIN, and both CLINs and ELINs are present in the government Task Order and needed in the reporting provided by the Carrier.



At inception, Inseego's DMS SaaS Solution was designed to deliver the reporting needed to help government agency customers reconcile their invoices to their funding documents. Before the Spiral 3 innovations, DMS allowed government customers to match their telecom purchases to the CLIN and run reports that could be used to reconcile their bill. While this allowed Carriers to meet the basic requirements of the government customer, it was a process that lacked safeguards for the Carrier and visibility for the government customer. The government customer often had a considerable wait until their accounting team could tell them what funding remained and what it could be spent on.

Now, with the Spiral 3 innovations, DMS provides more granular visibility to match a purchase to the specific ELIN item on the funding document, further automates the workflow with required approvals, and provides clear analytics to show the government customer what has been ordered and, most importantly, what is left to spend from their approved funds.

## DMS Advancement for Spiral 3

### Benefits to the Telecom Carrier

Telecom Carriers use DMS as an outsource partner to meet the complex needs of the government customer, and without the tools DMS provides, the Carrier would be unable to serve the government market. Not only does DMS give the Carrier access to this space but also protects the Carrier by providing cost controls on government spending.

Carriers are exposed to significance risk on government contracts. If an order was placed that couldn't be matched to a task order or the funds in the order expired, the Carrier would not get paid for the purchase.

The Spiral 3 innovation protects the Carrier from cost overruns, correlating the order and usage with the approved, available funds. Spiral 3 automatically generates a task order, which reduces entry errors and improves efficiencies. The quote must match the requisition document, and the task order must match the quote, meaning government customers can only fund what is quoted and order what is funded. If funding is expired or depleted, an order will be blocked. Ordering outside of funding must be done within the system using the Task Order Modification tool. This provides a clear audit trail of approvals and ensures funds are available for the Carrier for all orders entered.

#### Carrier Benefits

- ▶ PROVIDES COST CONTROLS FOR THE CARRIER
- ▶ ALLOWS CARRIERS TO MEET THE COMPLEX NEEDS OF THE GOVERNMENT MARKET
- ▶ AUTOMATICALLY GENERATES TASK ORDER
- ▶ REDUCES ENTRY ERRORS AND IMPROVES EFFICIENCIES
- ▶ PROVIDES A CLEAR AUDIT TRAIL OF APPROVALS

# Benefits to the **Government Customer**

DMS's Spiral 3 advancement also provides significant benefits to the government customer. DMS can be configured to meet the complex accounting requirements of government clients and provides visibility to the purchasing agent through the requisition process.

Prior to the Spiral 3 innovations, government customers would have to manually reconcile their billing report to their funding document to determine what they had available to spend. DMS now maps their purchases directly to the CLIN and shows how orders decrement funds in real time. Customers have this visibility because the order can be mapped directly to the contract item, down to the individual inventory item, and the customer's purchasing is limited to what is specified on the contract. Because of this data mapping and close integration, purchasing agents have visibility to and control over what is being ordered, and agency accountants can easily reconcile the bill through automated reports.

Additionally, this oversight is enabled with notifications based on configurable thresholds and enforced with approval gates. For example, approvals can be required if a discount is applied or if orders are made with dates outside the period of performance, and the customer and Carrier can receive notifications when the spend is close to overrunning on their contract.

## **Carrier Benefits**

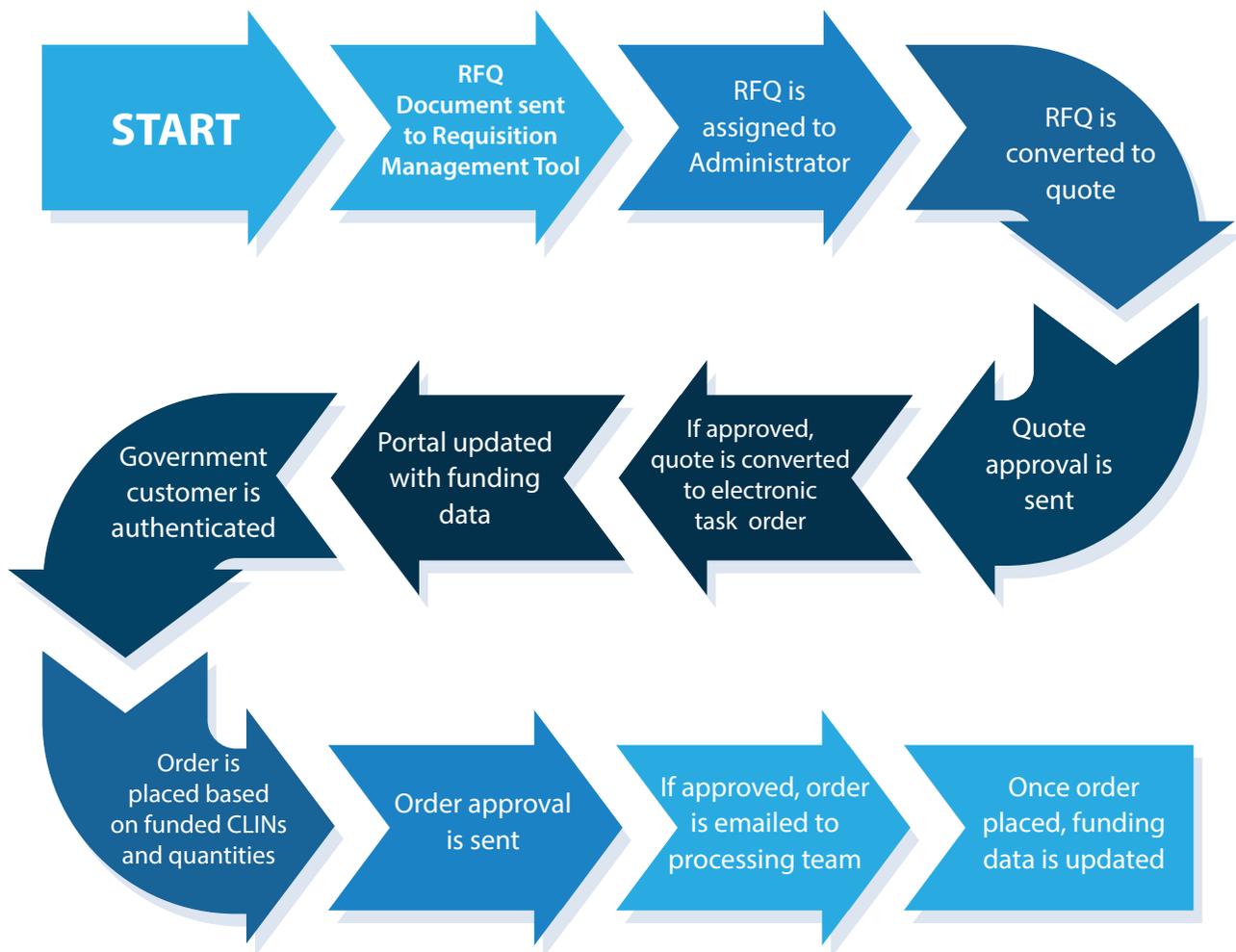
- ▶ PROVIDES VISIBILITY TO ACCOUNTING TEAMS WITH REPORTING
- ▶ PLACES CONTROLS ON THE DEPARTMENTS AND INDIVIDUALS ORDERING
- ▶ ALLOWS PURCHASING AGENTS TO RECONCILE BILLING
- ▶ SIMPLIFIES THE REQUISITION PROCESS FOR THE USER, MAKING IT CLEAR HOW MUCH IS AVAILABLE TO SPEND AND WHAT CAN BE ORDERED
- ▶ PROVIDES A CENTRAL PORTAL TO MANAGE THEIR ORDERING, BUDGETING, AND BILLING

The Spiral 3 innovation protects the Carrier from cost overruns, correlating the order and usage with the approved, available funds.

# The Spiral 3 Process

DMS provides controls from requisition to fulfillment for the federal space, including a requisition tool to manage originating documents, a tool to create a quote, the ability to automatically convert the quote to an electronic task orders (the equivalent of a government purchase order), and the ordering, processing, and reporting functions to complete the lifecycle.

## THE SPIRAL 3 PROCESS IS SHOWN HERE:



## Requisition

# Management Tool

A key component to the Spiral 3 process is the DMS Requisition Management Tool (RMT). The RMT tracks the entire lifecycle of the funding request, verifying approval of the quote, tying approvals to the contract, and creating an audit trail to record what was asked and what actions were taken.

The RMT is the first step in the process. When a funding request is received, a record is created and documents are automatically linked to create a consistent conversation chain throughout the requisition. The records in RMT update as the purchase progresses through the ordering and fulfillment process, updating the win/loss status and even tying the phone number and SIM to the task order to make it easier to reconcile associated contract line items. RMT keeps the records in a central location and allows DMS to automate the controls and enforcement of purchases, to make sure individual inventory items ordered match the task orders.

## Quote Tool

# Streamlines the Process

After the funding request is received and stored in the RMT, the Carrier sales representative can create a quote directly from the RFQ origination documents. The Quote Tool streamlines the process for the Carrier Rep. and ensures the quote correlates to the contract requirements. This safeguard allows Sales to quote only what is allowed in the requisition document, only in the combinations allowed, and ensures that only allowable expenses are submitted for that agency. The quote is then sent to the Government agency for acceptance, and when approved, the Task Order is automatically generated, and the customer may order from approved devices and rate plans.

## Task Order

# Management

The Task Order is a formal control document that works as a contract between the Carrier and the government customer, including the total approved funding and outlining what can be ordered. The Task Order must be on record before an order may be placed, and Spiral 3 enforces inventory controls that tie the order to the Task Order to verify the expense is authorized in the funding document. Customers will only see approved rates and devices when they go to place an order.

Once an order is placed, the charges are tracked to the contract and costs are decremented from the available funding. The customer can see their available funding in real-time on their dashboard, along with the remaining period of performance. Further, the customer and the Carrier can receive notification if the funding is about to expire or the funds are depleted. Notifications are sent when the spend is projected to exceed the funding level, and the number and timing of these notifications are configurable, which is important for both the customer and the Carrier. The customer needs to know what spending they have available, and the Carrier is protected against loss if an order is fulfilled without funding available. If the money is running out on a Task Order, the order can be modified; however, lead time is needed for this extension.

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# Hierarchy Management

Part of the controls Spiral 3 delivers includes the new Hierarchy Management capabilities, which allow customers to easily tailor user access and permission profiles for each agency. Customers can customize the account structure and manage permissions by account and department, and visibility can be set to create parent and child permissions (which limits visibility for all levels under the parent layer). Further, specific user access can be configured by line, providing the customer control on a granular level.

## Reporting

Finally, Spiral 3 not only provides the workflow controls to protect the customer and Carrier but simplifies reporting and reconciliation for both. Our Task Order report matches funding with the award dates and amounts, and makes it possible to associate the item ordered to the line item on the contract vehicle. This report and the Invoice Emulation report, which translates the billing data for the customer and breaks charges down by CLIN, helps with billing reconciliation.

## Conclusion

Spiral 3 represents significant efficiencies to increase the speed and accuracy of order processing and protect the Carrier from loss of revenue if spending isn't approved on a funding vehicle. Simultaneously, the Government customer is provided controls with clear approval workflows, visibility to funding limits, and complete audit trails and reporting.

Inseego is proud to be an outsource partner to tier-one Carriers and provide end-to-end service for telecom ordering, customer care, billing, reporting, and contract management. DMS's Spiral 3 innovations enable tier-one Carriers to serve the complex requirements of the Spiral 3 contract and accelerate the growth of their government subscribers.

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