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REPORT NO. 2024-23

TO: Jeff Rohrs, Chief Information Officer, Business Technology Services

FROM: Melissa Dondero, Inspector General/Chief Audit Executive
Division of Inspector General *md*

DIST: Ken Burke, CPA, Clerk of the Circuit Court, and Comptroller
The Honorable Chair and Members of the Board of County Commissioners
Barry Burton, County Administrator
Mike Twitty, Business Technology Services Board Chair
Merry Celeste, Division Director, Purchasing and Risk Management
Jeanette Phillips, Chief Deputy Director, Finance Division

SUBJECT: Inspector General's Follow-Up Investigation of the Oracle Business Intelligence Enterprise Edition Upgrade

DATE: November 27, 2024

The Division of Inspector General has completed a Follow-Up Investigation of the Oracle Business Intelligence Enterprise Edition (OBIEE) Upgrade. The objective of our review was to determine the implementation status of our previous recommendations.

Of the five recommendations in the original investigative report, we determined that all five have been implemented. The status of each recommendation is presented in this follow-up report.

We appreciate the cooperation shown by the staff within Business Technology Services (BTS) during the course of this review.



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I. Scope and Methodology

We conducted an investigative follow-up of the OBIEE Upgrade. The purpose of our follow-up review was to determine the status of previous recommendations for improvement.

The purpose of the original investigation was to determine if:

- BTS sufficiently planned OBIEE projects and adjusted costs for applicable scope changes.
- BTS appropriately executed change orders.

To determine the current status of our previous recommendations, we surveyed and/or interviewed management to determine the actual actions taken to implement recommendations for improvement. We performed limited testing to verify the implementation of the recommendations for improvement.

Our investigative follow-up was conducted in accordance with the *Principles and Standards for Offices of Inspector General* and *The Florida Inspectors General Standards Manual* from The Commission for Florida Law Enforcement Accreditation and, accordingly, included such tests of records and other investigative procedures, as we considered necessary in the circumstances. Our follow-up testing was performed during the month of November 2024. Transactions and processes reviewed were not limited to a specific period during the original investigation.

II. Original Report Reference

To view the original report (Report No.: 2023-23), published in the report section of our website, please use the following link:

[Report 2023-23 Investigation of the Oracle Business Intelligence Enterprise Edition Upgrade](#)

III. Implementation Status Table

FINDING	PREVIOUS RECOMMENDATION	STATUS
1	<i>BTS Paid The Total Firm-Fixed Price Project Cost For The OBIEE Upgrade But Only Received Part Of The Agreed-Upon Work.</i>	
A	Ensure County systems are updated timely.	<p style="text-align: center;">Implemented</p> <p>No required updates to OBIEE have been made since the issuance date of the original investigative report, August 24, 2023. Therefore, testing was unable to verify the timeliness of OBIEE upgrades.</p> <p>BTS attempts to upgrade systems in accordance with the feedback received from applicable stakeholders. This communication assists in the efficient and timely implementation of applicable updates.</p>
B	Ensure that future projects are sufficiently planned to avoid unnecessary scope changes.	<p style="text-align: center;">Implemented</p> <p>No required updates to OBIEE have been made since the issuance date of the original investigative report, August 24, 2023. Therefore, testing was unable to be conducted to verify the planning completed by BTS for OBIEE upgrades.</p> <p>For each potential scope change, BTS evaluates additional requirements, including project needs, timelines, and cost, to efficiently upgrade OBIEE.</p>
C	Ensure that when scope changes are required on future projects, the price is adjusted to match the scope change.	<p style="text-align: center;">Implemented</p> <p>No required updates to OBIEE have been made since the issuance date of the original investigative report, August 24, 2023. Therefore, testing was unable to be conducted to verify whether pricing was appropriate for scope changes to OBIEE upgrades.</p>

FINDING	PREVIOUS RECOMMENDATION	STATUS
		For each potential scope change, BTS evaluates additional requirements, including project needs, timelines, and costs, to ensure OBIEE is efficiently upgraded.
2	<i>BTS Did Not Execute A Proper Change Order.</i>	
A	Ensure proper training for staff regarding the County's change order process.	<p style="text-align: center;">Implemented</p> <p>The Director of the Division for Purchasing confirmed the informal training conducted during a BTS Leadership Team meeting on November 28, 2023. During this meeting, the Director of Purchasing discussed the guidelines for the zero-cost change process to ensure future change orders are processed consistently.</p>
B	Ensure future changes are reviewed and approved by the appropriate officials.	<p style="text-align: center;">Implemented</p> <p>No required updates to OBIEE have been made since the issuance date of the original investigative report, August 24, 2023. Therefore, testing was unable to be conducted to verify whether change orders were reviewed and approved by the applicable Pinellas County (County) officials.</p> <p>For all future upgrades to OBIEE, BTS has agreed to comply with the County guidelines in the Purchasing Manual.</p>

MD/EP