Advisory Committee Meeting

Date: 8/13/09
Time: 10:30 A.M. – 12:00 P.M.
Location: EBS West Conference Room

Review status of HCM Stabilization
Bruce Theurer reported on the status of the HCM stabilization.

- **Help Desk Tickets**
  In the past few weeks, the number of open tickets is stabilizing – the tickets help the EBS Support Team know what to address, i.e. time and PA entry.
  HCM Total Tickets: 746
  Open tickets: 89 (38 paycheck related items)

- **Time and PA entry**
  1. Continues to be a challenge for some bureaus to meet the entry deadlines
  2. Will be monitoring the number of retroactive actions
  3. Will be providing education on retroactive actions – timekeepers need to understand what the retroactive process and impacts are with the new system

- **Off Cycle Checks**
  The number of off cycle checks is higher than normal. The EBS Support Team is working closely with bureaus to help timekeepers reduce this number.
  - 409 Total
  - Volume occurs the 3 days after a paycheck (payday and the next 2 days)

- **System Availability (post payroll) target: Tuesday at 12:00 noon**
  The EBS Support Team is working with Central Payroll and the bureaus to meet their system availability target of Tuesday at 12:00 noon.
  - 1st Cycle: Tuesday 8:30am
    - Team worked ~24x7
  - 2nd Cycle: Tuesday 12:30pm
  - 3rd Cycle: Tuesday   5:30pm
    - Delayed time entry & issues with posting to closed cost objects
  - 4th Cycle   Tuesday   2:00pm

- **Support Centers, Support Contact Calls**
  Bruce asked the PAC to encourage employees to use the support centers for time entry and PA actions. We will continue to schedule them through August and September.
  - Continuing support centers for Time, Personnel Actions and Org Management
  - Support calls continue three times per week for Time Management, Personnel Admin
  - 'Help Squad' engaging with bureaus on time entry improvement help (PPB, PBOT, BOEC)

Discussion Topics
Jane Braaten and Bruce Theurer reported on the next two discussions topics, 1) ESS Report and 2) FILO/HCM Request List.

- **ESS Report (handout)**
Jane reported on the findings and recommendations of the Employee Self Service pilot group – the first group of employees to transition to entering their time directly into SAP through the ESS portal. A copy of the report is attached.

  The purpose of the report is to document the process, training and support requirements, and recommendations for future ESS roll outs. The pilot group change agents attended the meeting (Scott Turpen of BES, Joyce Reyman of PBOT, and Tom Fitzgerald of Water).

  Fire asked the change agents what their ESS employees are saying about the new system.
  - Water – the system was received better than expected. A lot of enthusiasm and employees are pushing to get more people on it
  - PBOT – initially a struggle with tracking seasonal people, but overall pretty good
  - BES – the transition went fairly smoothly. The interim process was designed to match ESS, so they expect a smooth transition to ESS.

  The PAC discussed the report's eight recommendations. They were in general agreement with the first four recommendations for expanding ESS, noting that bureaus need to communicate their interest in the timing of their ESS rollout and that the EBS Support Team will need to review the individual rollout plans and make a final recommendation on timing. Recommendation #7 to update training materials was accepted. PAC members spoke in favor of recommendations #5 for MSS, #6 for a bureau-wide access role for select managers and #8 for part-time employees to use ESS – these three will be considered as part of the process of prioritizing requests for improvements.

  <u>**Next steps for PAC:**</u>

  1. BES, PBOT and Water – provide rollout plan with dates and number of employees

  2. BDS, Parks and OMF – provide input on bureau interest in rolling out ESS in your bureau, anticipated number of employees, and proposed timing

  3. Remaining bureaus – provide input on your interest in rolling out ESS to your bureau as well as proposed timing

- **FILO/HCM Request List (handout)**
Bruce reported on the process and next steps for the EBS Request List (post go live improvement list – items from FILO, HCM, and bureau action plans).

  - The EBS Support team will review "required" action items on the list, i.e. service packs to keep SAP software current, implement provisions of 2010 bargaining agreements, and implement HCM calendar year-end update.

  - The PAC will review the list and ensure their items are captured.

  - The team will pull items off the list that represent requests for new functionality for the ESC to prioritize.

  - The PAC will prioritize the improvements to "existing" functions, with input from team and business process owners

BTS is concerned system upgrades in SAP may conflict with ESS roll out. Jane said bureaus can still continue to prepare and plan for their ESS roll out. Bruce reminded the PAC that system upgrades, and other required actions, will take priority; the team will discuss this further with the PAC when they receive their roll out plan proposals and evaluate the service pack upgrade schedules and impacts…

Water suggested to Marty a review of the year end closing process with bureau reps – talk about ideas for next year and what we learned this year. Marty agreed, and will communicate this with Accounting and bureau reps.

Next steps for PAC:

1. Review the request list – available on the EBS website at http://www.portlandonline.com/omf/index.cfm?c=39389&a=258961.

2. Report to Change Captains by next Thursday, Aug. 20 any missing or new items, and provide "bureau contact" information

3. Identify and prioritize most critical items for your bureau and bring list to the next PAC meeting on Thursday, Aug. 27. The EBS Support Team will provide PAC with draft criteria for prioritizing your bureau items by 8/20.

4. Bruce will send proposed prioritization criteria to PAC members by next Thurs, Aug 20. PAC members will provide input via email before the next meeting (8/27). Criteria will be discussed and agreed to at the beginning of the next PAC meeting.

Communications on Business Practices
Jane advised the PAC that communications will be delivered directly to timekeepers, agents and PAC, about changes to our City's business practices. The EBS Support Team is working with BHR on these communications. To help facilitate these communications, we are recommending the following:
1. Enter time daily or by Wednesdays; run reports daily or by Thursdays
2. Support Timekeepers to use system correctly; duty to report
3. Ensure communication between financial and timekeeping staff
   • Do not post time to closed cost objects
   • Do not close cost objects during payroll processing

Next Steps
• Council Session on August 26th at 2pm – welcome to attend
   – Project summary report
   – Recognition resolution
   – Operating Principles (ERP and our approach on governance)

• ESS roll-out recommendation
   – Review with ESC in Sept.

• Important tips to remember as we move forward
   1. Continued Focus on Stabilization – make sure what we have we can do accurately
   2. Strengthen the Core – make it better, i.e. system upgrades
   3. Phase in new functionality – adding MSS and others

Next Meeting
PAC Meeting – August 27 at 10:30am

Pilot group selection

In January 2009, the Enterprise Business Solution (EBS) Executive Steering Committee and Project Advisory Committee made the decision to implement Employee Self Service (ESS) with a pilot group of employees who would be the first group to transition to entering their time directly into SAP through the ESS portal.

Pilot group criteria included:
- proximity to a bureau and project support structure
- management control and influence from an established Change Agent to build upon established working relationships and ability to meet deliverable deadlines
- groups likely to be able to adapt to change and provide support to the next group of employees
- employee with neither the easiest nor most difficult time to enter
- bureau recommended based on other organizational change efforts

The pilot groups selected were from the Water Bureau, Bureau of Transportation (PBOT) and Bureau of Environmental Services (BES).

The Water Bureau pilot group consists of 50 employees from the accounting department, public information office, director's office and two engineering groups. The Water group was selected because of their experience with automated financial/project management systems. They are also frequent PC users and have a mix of time entry situations, i.e. admin staff with few exceptions and engineers with many exceptions. For rolling out ESS in the future, Water recommends smaller groups of 20-25 employees at a time. They would roll it out by business group and bring a new work unit on every other pay period.

The PBOT pilot group consists of 40 employees from information management, transportation options and traffic operations. The PBOT group has a mix of COPPEA and non-rep employees, are computer literate and have a positive attitude toward change. The size of the initial group was manageable, however PBOT suggests a smaller number of employees for bureaus new to ESS. They felt the size of the group was less important than the ratio of employees to support contacts and timekeepers because of the need to visit each employee, test their ability to log into the system, and help with time entry questions. Future roll outs in PBOT would most likely be by business group and would target the groups with easier time entry first to reduce the ESS support workload on the bureau timekeepers. PBOT suggests rolling out a new group every other pay period.

The BES pilot group is the largest group and consists of 104 employees from business services, director's office and one group from engineering services. The BES group has a mix of union and non-rep employees, and the bureau felt this group and the number of employees worked well for the initial roll out of ESS. They are considering rolling out ESS to the remaining 300 employees in four segments, one group every other pay period. Because the training component for the interim time entry process was similar to the ESS training, they

feel the transition will be easier for these employees. They also feel that getting as many employees on ESS quickly will ease the workload for their bureau timekeepers.

Bureau trainer/support contacts

Employees were selected by the pilot bureaus to assist as trainers in both the financial training (FILO 101) and eLearning classroom training. They also served as support contacts for users after go live. Bureaus selected two types of trainers/support contacts: individuals who were experts in time entry and bureau time policies, and those who were well versed in FILO and the financial structure of the bureau. All three pilot bureaus agree that it is also helpful to have trainers and support contacts who have prior experience with IT rollouts and employee training.

The FILO 101 training and the ESS eLearning classroom training were led by members of the EBS project team with assistance from the designated bureau trainers. The bureau trainers provided bureau-specific information about cost objects and time policies. The bureau trainers in the eLearning course were also bureau timekeepers who had attended SAP timekeeper training and could explain some of the bureau and bargaining unit specific time entry scenarios and answer questions.

Support contacts were valuable to the bureaus, providing outreach and individual contact to the end users. PBOT's two support contacts spent approximately three hours per day for the first three days after go live assisting end users and reporting and resolving issues. Since go live, the amount of time needed has reduced to about one half hour per day.

FILO 101

FILO 101 for ESS training provided employees who had not had prior experience with SAP an overview of the City's new financial structure and how it relates to their time entry in ESS. It was a one-hour presentation delivered by an EBS Organizational Change Management (OCM) team member with assistance from a bureau trainer who was an expert in the bureau's financial structure. Three presentations were delivered, one for each pilot bureau. This training was adapted from previous presentations developed and delivered by the EBS project and a presentation created by BES which had been delivered to all their employees.

Pilot bureaus felt this training was helpful in providing basic financial structure information to employees. Some of the initial confusion with ESS time entry had more to do with mastering cost objects and understanding their differences than with the navigation and time entry. It was suggested that the training be bureau specific and go into even more depth and provide more specific examples of bureau cost objects.

As bureaus become more familiar with the cost objects, the FILO 101 for ESS may not be needed. Pilot bureaus suggested that the current version be kept available and that it be offered to new bureaus rolling out ESS with the suggestion that they tailor it to their bureau.

eLearning classroom training

Classroom training for ESS employees was bureau specific and taught in small groups of up to 16 employees. It was originally designed as an eLearning course that employees would take on their own, however, pilot bureau change agents felt a classroom training would provide a greater learning experience for employees. The classroom setting worked well in that it allowed employees to hear the questions and answers that others had and built synergy among the group.

For scheduling the training, the project staff scheduled time slots and assigned slots to the bureaus. Agents scheduled and notified their own personnel. This scheduling and notification system achieved a high attendance rate.

Some users felt the training was too generic with not enough bureau specific information. Suggestions for future training content included spending more time on how to enter exceptions for specific work scenarios and more examples of the different attendance/absence codes. Bureaus should also be prepared to provide templates of bureau scenarios to users as job aids.

For future roll outs, it was suggested that employees take the eLearning course on their own and then come to a classroom training that would include more bureau specific information about cost objects and specific time entry scenarios. It was also suggested that ESS time entry support sessions be scheduled for new bureaus during their first pay period so that users could have one-on-one help to enter real data into the live system.

EBS team support

EBS project support also included weekly meetings with change agents from the pilot bureaus, end user packets for pilot employees, and support contact call ins/meetings after go live.

Weekly meetings with the pilot bureau change agents began in mid-February, four months prior to pilot bureaus beginning time entry in ESS. These meetings were helpful in keeping the bureaus on track with tasks, providing input and staying informed of ESS developments. A task list was developed to track tasks including attendance at FILO 101, ESS eLearning and Time Reviewer trainings.

Pilot bureau employees were provided with end user packets that contained job aids, tips and contact information for help after go live. Users found these packets helpful.

At go live, daily call ins were initiated to report and resolve issues. These call ins turned into face to face meetings after a couple of days and support contacts found the meetings more helpful than the phone calls. Most of the initial issues were related to security and access. After two weeks of daily meetings, the group agreed that a weekly meeting was sufficient.

Bureaus should anticipate that agents will participate in a weekly planning meeting and support contacts will participate in a weekly user group meeting with EBS staff during roll out.

Bureau support plan

Pilot bureaus developed their own bureau support plans that included timelines, trainer selection, communication and go live support process.

PBOT had two support contacts for 40 ESS employees; Water also had two support contacts for 50 ESS employees; and BES, with the largest pilot group, had four support contacts for 104 ESS employees. In addition to the designated bureau support contacts, timekeepers and SAP subject matter experts (SMEs) in work units were helpful with specific time entry questions and general SAP navigation.

One-on-one support at go live worked best for the support contacts and end users. Support contacts checked in with each user on the first day to be sure they were able to access ESS and submitted help desk tickets for any errors or issues.

Bureaus recommend that the support contacts for future ESS roll outs be end users in SAP. It was recommended that the support contacts be given priority to be the initial group scheduled for ESS and time reviewer training.

Time Reviewer training

Time Reviewer training was delivered to those managers who have employees who enter their own time into ESS. Because there is no paper or emailed timesheet that managers review, they need access to SAP to review the time that was entered for the employee. The two-hour course was delivered in the EBS training classroom, and pilot bureau change agents felt the classroom setting was appropriate.

Some of the time reviewers had not had any prior experience with SAP and found the training was missing some of the necessary basic SAP information needed to understand the course content. Some also felt that the training material was covered too quickly without enough time to digest the information. The course content may need to be assessed to see if any additional material, simulations or information could be added that would provide more details to time reviewers.

The training was taught by EBS staff, and it was suggested that bureau staff be used as trainers in the time reviewer class as they were in the eLearning class. Time Reviewers also need to be reminded to take the SAP Basic Navigation and Basic Reporting eLearning courses prior to the Time Reviewer class if they have not have prior experience navigating SAP. Agents familiar with the earlier demonstrations of Manager Self Service (MSS) thought that MSS reporting functions were more user friendly than the time reviewer role reporting functions.

Security and access

Employees were given access to the ESS role once they completed the eLearning training and passed the course assessment. Ninety two percent of employees passed the test on the first try in the classroom setting. Some employees who did pass the assessment were not

able to access ESS on the first day, and pilot bureau change agents said the EBS security team was responsive and handled these issues quickly.

Security access for time reviewers was more challenging, but eventually all ESS managers received access to the time reviewer role so that they could review their employees' time entries.

Issue resolution

Change agents and support contacts met more frequently during the first few weeks after go live. They monitored reporting of incidents through Help Desk tickets and user questions, as well as time entry errors and need for issuance of off cycle checks.

Other than access issues within the portal that were reported at go live, ESS support contacts did not report a high number of incident tickets that required project support.

Both agents and support contacts reported that the ESS users had no greater rate of time entry errors or need for off cycle checks than other employees with time entered by timekeepers.

Recommendations

1. <u>Pilot bureaus should plan and implement the expansion of ESS within their own bureaus and, in addition, an additional set of bureaus can bring in subsets of employees into ESS</u>. Pilot bureaus agents will plan and execute the expansion of ESS within their work groups and bureaus, and recommend a roll out schedule to the EBS support team. Three additional bureaus can be identified to participate in the second wave of ESS rollout. These are anticipated to be Development Services, Parks and Office of Management and Finance. These bureaus would, just like the pilot bureaus, identify a subset of employees to be the first onto ESS (no more than 50 each). They would plan the rollout with the EBS support team and be responsible for the training and support to their end users.

2. <u>Pilot bureaus and additional bureau subsets could begin planning work in August. Pilot bureaus could bring in additional employees starting in September, with additional bureaus starting Oct. 1</u>. Pilot bureaus already have the training materials and support structure in place to begin bringing in additional employees. New bureaus could complete their initial set of training and support by the Oct. 1 start of a new pay period. Additional bureaus could begin planning toward an Oct. 29 start. This starts the larger bureaus with longer roll out plans first, followed by the smaller bureaus. The City would anticipate the end of the roll out by December/January. The ESS planning meetings would grow in attendance as new bureaus adopt ESS, allowing those experienced with bureau implementation to provide guidance to their colleagues.

3. <u>New ESS employees should be brought on in groups to get access to the role; implementing bureaus should be responsible for the training requirements</u>. Bureau agents should identify the employees and the roll out dates and provide those to the EBS support team. These employees should receive the role on the date assigned. Bureaus should be responsible for conducting the training, monitoring the assessments and supporting the employees to enter their time accurately and on time.

4. <u>Evaluate roll outs according to the ability to enter time accurately and on time</u>. Additional work groups should be brought into ESS according to the implementing bureau's ability to provide support to end users, monitor and correct time entry errors before payroll runs to avoid the need for off-cycle checks. In other words, if an above-average number of problems arise, the rollout schedule will be re-evaluated.

5. <u>Manager self service should be implemented as soon as possible</u>. MSS provides managers with a time-exception approval process and a more user-friendly access to time reports. Because it provides managers access to time reports, it reduces the workload on bureau timekeepers. Bureaus view MSS as valuable to implement, even for employee groups that keep using timekeepers for time entry.

6. <u>Create an additional time role for a select group of managers with bureau-wide responsibilities</u>. The ESS pilot bureaus understand that the EBS support team is resolving a current security issue with the time reviewer role. The time reviewer role is designed to allow managers and supervisors to view time reports for their direct reports. ESS pilot bureaus recommend that a new role be created that allows a select group of managers (direct reports to the bureau director or those with bureau human resources

functions) to have a role that lets them view time data for all the employees in the bureau in order for them to create reports for the bureau director.

7. <u>Update and enhance the current ESS and Time Reviewer eLearning course</u>. Both courses were developed on tight timelines. Now that the trainers have the benefit of classroom comments, the courses can be updated to reflect the business process, timelines and usage guidelines that will be in place in the future.

8. <u>Part-time employees with set regular schedules should be considered for ESS</u>. Currently part-time employees are positive time entry and positive time entry employees are not part of ESS.

Attachments:
- Pilot Bureau task timeline
- ESS sample bureau task timeline

August 13, 2009

Report Contributors

Pilot Bureau Change Agents
Tom Fitzgerald, Water
Joyce Reyman, Transportation
Scott Turpen, Environmental Services

EBS Staff
Jane Braaten, Change Management
Lynne Casey, Communications
Amy Loyd, Training
Tanya Morsberger, Human Capital Management
Mark Schackart, Human Capital Management
Gayle Young, Training

ESS Pilot Bureau Requirements

Requirement	Due Date	BES	BPOT	Water	ALL
Identify super user/trainer for TM for City effort	1/30	x	x	x	x
Review training deliverables and timeline	2/5	X	X	X	X
Preview bureau powerpoint presentation	2/5	X	X	X	X
Identify employee sub groups; confirm with project	2/6	X	X	X	X
Role map employees in pilot group to ESS / provide network IDs	2/13	x	x	x	x
Plan interim process for collection, approval, entering	2/13	x	x	x	x
Ensure all super users attend a TM train-the-trainer course	2/17	x	x	x	x
Document plan for timekeeper and interim; submit to project	2/19	x	x	x	x
Schedule training/education sessions on interim process.	2/25	x	x	x	x
Schedule bureau led training/education sessions on ESS process.	2/25	x	x	x	x
Schedule training/education session on timekeeper process.	2/25	x	x	x	x
Adapt any current paper processes to SAP	3/1	x	x	x	x
Adapt current or other timesheet; select an ESS screen timesheet or use TARS with supplement	3/1	x	x	x	x
Ensure all employees attend TM and PA training	3/4	x	x	x	x
Create bureau support plan - identify natural helpers	5/8	x	x	x	x
Schedule employees for ESS classroom training	5/8	x	x	x	x
Identify bureau super users for ESS	5/8	x	x	x	x
Ensure all applicable employees attend a FILO 101 training - Project/Bureau delivered 5/18 - 5/21	5/21	x	x	x	x
Review all processes and training/education materials with timekeepers	5/29	x	x	x	x
ESS eLearning Classroom Training	6/1 - 6/5	x	x	x	x
Ensure all applicable employees attend training/education session on ESS process. - Project/Bureau delivered training 6/1 - 6/5	6/5	x	x	x	x
Implement bureau support plan	6/11	x	x	x	
ESS Time Reviewer course posted	6/15				x
ESS opens for time entry	6/18				x
ESS time reviewer classroom training	6/22 - 6/24				x
Report Weekly on key indicators • Role mapping done - 2/12 • Plan approach ok'd - 2/19 • Train-the-trainer complete - 2/19 • Identify additional resources needed/backfill - 2/19 • Bureau Support plan created - 5/8 • Training materials reviewed - 5/21 • EUT training completed - 6/5 • All communication/training conducted; "GO" - 6/11	weekly PAC meetings				x

ESS Bureau Task List

Requirement	Due Date (instert bureau specific dates)	Completed
Planning	at least 1 month prior to first ESS time entry	
Identify employee sub groups; confirm with EBS support team		
Create bureau support plan		
Identify super user/trainer		
Identify applicable time reviewers		
Review training deliverables and timeline		
Preview FILO 101, ESS and Time Reviewer courses		
Tech	2 weeks prior to first pay period	
Role map applicable employees to ESS and/or Time Reviewer / provide names and network IDs		
Ensure all applicable employees have a valid PortlandOnline account and know their password		
Training	2-3 weeks prior to first pay period	
Schedule bureau led training/education sessions on FILO 101		
Ensure all applicable employees attend a FILO 101 training		
Schedule employees for ESS classroom training		
Ensure all applicable employees take ESS eLearning course prior to classroom course		
Ensure all applicable employees attend ESS classroom training		
Ensure all applicable employees attend time reviewer classroom training		
Support	Tues week of payday	
Identify bureau support contacts for ESS		
Implement bureau support plan		
ESS opens for time entry		