

# Meeting Notes



## Program Advisory Committee Meeting

**Date:** 11/19/09

**Time:** 10:30 A.M. – 12:00 P.M.

**Location:** EBS West Conference Room

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### PMO Support Pack installation and testing update

Bruce Theurer reported on the status of the Support packs testing. QA testing is in process and on track for completion 11/25/09. This includes interface testing as needed. Revision 1 of the cutover plan is complete.

The time line for cutover weekend was reviewed:

- SAP offline, users locked out - Friday 12/4 4 PM
  - Patching complete - Saturday 12/5 7 PM
  - Team System checkout - Sunday 12/6 AM
  - Go, No-go - Sunday 12/6 12 Noon
  - Transaction checkout - Sunday 12/6 PM \*\*\*
  - Unlocked System -Sunday 12/6 PM
- \*\*\* Need Bureau resources to execute some basic transactions.

The status of the following items was reported:

- Brass Interface – waiting for final signoff
- 1099 – In process
- W-2 – In process
- FMLA Workbench & Reports – Requirements gathering can start
- 2010 Labor Contract –ongoing as needed
- FPD & R interface – Dec.
- New Asset Class- Dec.

Bruce stated that the ESS planning has continued with Pilot Bureaus as we expect this to be one of the next priorities

### Time Reviewer Role

Types of reports currently attached to role: PA20, PT50, CAD0, PT\_BALOO, PT\_QTA10, PT\_ERLOO, CATS3, CAT\_DA, ZHR\_Sickleave Report, and ZHR\_Work\_Out\_Class. Tom Schneider sent out description of role mapping. There was some discussion on clarification of the confidentiality associated with this role. Anna Kanwit is doing a rewrite and will send this to the PAC. Anna stated that basically a person should not be looking for confidential information unless they have a business requirement to. The signed Bureau confidentiality form that was used for ESS does not cover the perspective as this form.

### Next Steps for Time Reviewer Role

- Validate role mapping- from Bureaus by 12/1. Currently there are 502 that are role mapped to this role. CMT team will send out a request for the Bureaus to review the list. Bureaus need to respond back with a corrected list by 12/1/09. Bruce stated that this list is not tied to ESS at this point. ESS is separate. Tom Schneider explained the difference between the time keeper and reviewer roles: The time reviewer role is

a subset of the timekeeper role and is display only. Bureaus can run FILO reports, if they have a FILO role, without having this role. For Example the ZFIPYFOR report is open across the city (with a FILO role) to run but the CATS 3 report is restricted to a specific PA.

- The team will be updating training materials for this new role and should be completed by 12/24.
- Deliver training (bureaus) – Bureaus will need to deliver this training as it will be specific to operational process within the bureau. Duration of the training will be based on the rollout plan of each bureau.

Bruce explained that the work on this could have an impact on rolling out ESS so the Bureaus and EBS team will have to work together on planning for these.

### **SAP Training**

- Current challenges with training  
On demand training and exception requests - (For example when a new employee starts a job tomorrow.) Resources are limited for the on-going team. There are 1600 users city wide that need support. Focus for the support team is on training development and training administration.
- What is Needed  
The city needs to have an on going commitment to quality training. We need to establish a cadre of SAP Super-User Trainers. These super users need to be approved by Process owners, and need to have gone through train the trainer with the support team. Shared resources reduce individual bureau impact.
- Policies and Procedures  
People request training but don't show up. Gayle Young does Pathlore and email confirmation. No show's will be removed from the training list. The ticket will be closed and will be a re-request. (This does not include reschedules). No Shows will be published to the bureaus sponsors and change agents.

### **Discussion on Training**

Discussion followed about there being road blocks with new hires because they do not have the required training and cannot work until they are trained. It was suggested that the team act more swiftly with new hires. It was also brought up that Bureau staff have full time jobs and cannot be committed to do training as well. It was mentioned that some people are not good at training. Maybe there is a more efficient way to do this. Another suggestion was to have Bureaus advertise when they have a training scheduled so other Bureaus can attend. It was suggested that maybe we can get a schedule of Bureaus training on line. Rodney O'Dell suggested that maybe OMF AR users can be trainers and help other Bureaus.

Bruce stated that there are many super users who can train but who do not understand the training process such as using a check list. Bureaus need to follow the procedure to get Super-User trainers approved. It is our goal with approved trainers- ability to deliver quality training in a consistent manner. It would be helpful if Bureaus would proactively request training such as when a new employee is coming in two weeks. The team will work on speeding the training process up but Bureaus need to remember there is only one FTE. Bruce will get a list to the PAC on approved trainers.

Jennifer Sims stated that the Bureaus have agreed in the past to have super users who can train others. The Bureaus will need to manage this process. The team cannot do it all. If we have enough Super-User trainers throughout the city then some Bureaus can help others. No one is saying that Bureaus can't do their own training just that the trainers need to be approved. The way to address new employee training that is not within their own Bureau is to use other trainers through out the city.

### **Communication Plan**

A communication plan for the EBS office was presented to the PAC. It describes how EBS is going to communicate information to the City now that we are in support mode. Information will be sent out to the Executive Steering Committee, the PAC, through the website, user group meetings, newsletter, and change agents. Lynne Casey is currently responsible for this communication. This is the plan post project. Anyone who wants to be on the team for improving the EBS web site should contact Lynne.

## Updates

- PAC Prioritization Process

Updates from the sub committee were lead by Bob Winthrop. The group created a flow chart on how a change in SAP is requested. The PAC reviewed this handout and another hand out form on criteria for prioritization. Bruce stated that regarding labor intensive workarounds: some are change requests and some are (break/fix). Larry O'Dea stated that a labor intensive workarounds should come first. Jack Graham stated that the group will be looking at costs and the integrity of Sap system so more Bureaus as a whole can benefit. Some labor intensive things may not be done because it would be too costly. Larry stated that he was concerned that the team will do more enhancements than fixes. Fred Kowell asked if Upgrades count. Bruce stated that upgrades to systems may affect interfaces for the team so the team needs to be informed but the upgrade itself is not. Anna stated that not all items are going to get done so this criteria is what they base their decision on when the forms come in.

Jane Braaten mentioned that Bureaus need to do Budgets so they need the actual work on prioritization done by Dec 1. Jennifer Sims mentioned that the team needs to know what they will be working on in the future and what resources on the EBS team are needed in the future. Bob mentioned that once this process is approved by the PAC then the committee will begin the prioritization process. The new form needs to be submitted from PAC Committee members only. For those Bureaus without a PAC member, then a Bureau Sponsor can submit. The PAC approved the new Change request form with one addition. The addition would be for a signature of a PAC member / Bureau Sponsor. So all prior lists need to go away and Bureaus need to fill out the new form. Bob also communicated the need for more people on their committee (perhaps from the infrastructure Bureaus). The group stated they need to reevaluate the process in 3 months to see if working correctly. Bruce wanted the list by Dec. 1. Anna Kanwit stated that with the Holidays coming the group may not be able to finish by Dec 1. Bob Winthrop stated the group needs the forms in by Dec 4<sup>th</sup> and then they will commit to getting the prioritized list to the PAC by the Dec 10<sup>th</sup> meeting.

- EBS Staff

Jennifer Sims stated that it has been identified that EBS staff need more training so we don't need to rely on consultants so much and this is part of an add package in the budget. We do not have enough staff for payroll or training. May need 20% increase in the budget for EBS to do the work. Bureaus need to consider that they have that increased cost of 20%. Jennifer will send out additional information to the PAC.

## Scheduling and logistics

The next PAC meeting will be Dec 10<sup>th</sup>, 2009. There will only be one meeting in December.

## EBS Change Request

<b>Title:</b>		<b>For Team/PAC use</b>
<b>Submitted by Bureau Sponsor:</b>	<b>Phone:</b>	<b>Request #:</b>
<b>Bureau:</b>	<b>Date:</b>	<b>Priority:</b>
<b>SAP Area:</b> (AR, AP, TM,...)		<b>Date:</b>

<b>Problem Statement / Business Needs Description:</b> <i>Describe the current or anticipated problem or other business needs to be addressed by this request.</i>

<b>Expected Benefits and Outcomes:</b> <i>Describe the benefits expected as a result of this request base on the prioritization criteria. Use quantitative data where possible.</i>

**(For Support Team Use Only)**

Change Impact Analysis	
<b>Completed by:</b>	<b>Date:</b>
<b>Proposed Solution(s):</b>	
Change Impact Description (include dependencies)	Est. Hours
<b>Functional:</b>	
<b>Technical:</b>	
<b>Change Mgmt &amp; Training:</b>	
<b>Other:</b>	
<b>Total Estimated Hours</b>	



## Criteria for Prioritizing FILO and HCM Improvements to Existing Scope

A bureau's change request that meets one or more of the first three criteria will be placed in a category designated "High Priority." Change requests that are included in the High Priority category will be sequentially ranked relative to each other, based on an evaluation of all applicable criteria. Change requests that are not designated as high priority will be evaluated under the remaining criteria and categorized as medium or low priority.

### Primary Criteria:

- **Economic value to the City**  
The item improves the collection of revenue, directly reduces the cost of business operations of the City or improves efficiency of operations. The benefit derived from the item is greater than the total cost to complete the necessary work and support it.
- **Consistent With an enterprise business system and with standardized business processes**  
The item creates, enhances or maintains standard City-Wide business processes and does not create a customized, one-bureau approach to business processes.
- **Legally required**  
The item is necessary to comply with statutory or regulatory requirements.

### Secondary Criteria:

- **Eliminate shadow systems or labor-intensive workarounds**  
The item will allow (a) shadow system(s) to be eliminated or it will automate within SAP a function currently being done manually outside the system.
- **Critical to a broad range of business groups within the City**  
The item supports a number of bureaus or an entire business group (infrastructure, public safety, etc.) in performance of essential business processes.
- **The timing of the request is consistent with the City's goals and objectives**  
The item does not cause duplicate work, conflict with or create a solution that will become obsolete by other strategies or initiatives.

Once the change requests within the high category are ranked, the support team will estimate the level of effort and resources needed to implement each request. Ranking of requests in the high category may be reconsidered after the estimates are completed.

Note: Criteria listed under Primary and Secondary Criteria are in no particular ranked order.