

A guide defining the role of the SAP Change Agent, providing instructions to specific functions when using SAP, and a resource list to use when support is needed by the Change Agent.

Change Agent

Responsibilities & Resources



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Bureau Change Agent Responsibilities & Resources

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Bureau Change Agent: Roles & Responsibilities

The Change Agent is the primary link between the bureau and EBS. EBS and the Change Agent are active, mutually supportive partners in change management and communication processes and in the success of SAP in the City of Portland. The Change Agent will communicate with EBS and coordinate bureau resources in support of new functionality, day-to-day bureau use of SAP, and break/fix situations.

Change Agent workload will vary with the size of the bureau, level of SAP functionality in the bureau, and other bureau needs. At a minimum, the Change Agent should expect to devote 2 hours per week and up to 10 hours per month to SAP-related issues on an ongoing basis and more when new functionality is being planned or rolled out to the bureau.

Bureaus and Change Agents should expect that EBS will actively listen to bureau concerns, be sensitive to bureau needs, seek solutions to problems, and communicate actively regarding all EBS/SAP activities that affect the bureau.

Responsibilities:

- **Communications**
 - Serve as the primary point of contact for communication and coordination between EBS and bureau.
 - Advocate bureau needs to EBS and advocate EBS plans, schedules, and needs to the bureau.
- **Training & User Support**
 - Work with EBS to coordinate citywide training for staff consistent with information provided in SAP.
- **SAP Role Assignment & Auditing**
 - Request security roles for Bureau staff.
 - Audit security roles on existing staff when position changes or terminations occur
- **EBS Project Partner**
 - Partner with EBS in the planning and rollout of new functionality.
 - Coordinate and schedule bureau resources for blueprinting, project pilots, functionality testing, training, and/or post-rollout evaluations.
- **Business Process Maintenance**
 - Ensure that bureau-specific business processes are reviewed and updated when new functionality or enterprise business processes are introduced.
- **Process Improvement**
 - Work with EBS to identify bureau concerns regarding SAP and then to develop, implement, and communicate solutions.
- **Provide Feedback to EBS**
 - Seek input from bureau staff and stakeholders and proactively communicate feedback to EBS regarding project status, day-to-day service issues and concerns.



Bureau Change Agent Responsibilities & Resources

Qualifications:

- Has executive-level support for business process changes, communications, and other change management activities.
- Strong understanding of the bureau, business processes, and contact with bureau management so that problems can be readily solved when more than Change Agent input is required.
- Excellent communication skills – both written and verbal.
- Committed to innovation, efficiency, and an enterprise business model for the City of Portland.
- Able and willing to participate in change management team meetings and, occasionally, project planning, blueprinting, or other work as needed to support the bureau's use of SAP.
- Able and willing to make the minimum commitment of time to Change Agent responsibilities.

Change Agent Network:

A body of change champions* who use their passions and skills to help usher in the adoption of change, individual by individual. Change Agents act as liaisons between the project (those developing something new) and the business (the day-to-day operations).

*A change champion (Change Agent) is someone who openly believes in and supports a change.

Day-to-Day Change Agent Tasks

The task that Change Agents perform most often is the assignment of SAP roles for staff. Only Change Agents can authorize the assignment of roles for personnel within their bureau. If a manager, for example, contacts SAP requesting a role for an employee the Change Agent must authorize that role assignment. Why? Because the Change Agent's duty is to ensure the role being requested does not have a Segregation of Duties Conflict, is appropriate for the position, or is not already attached to the position the employee is in.

Assigning Roles to Bureau Personnel

Change Agents should have the role RP_S_CHAG_ROLE ASSIGN. This role provides the ability to assign to any employee within their bureau the Employee Self Service Role and the role enabling use of CityLearner using transaction ZROLE:

- [RP_C_HR_EMPLOYEE_SELF_SERVICE](#);
- [RP_S_HR_MANAGER_SELF_SERVICE](#); (Note: when this role is assigned, the role RP_C_LIMITED_PROF_USER_DISPLAY is automatically assigned along with it);
- [RP_S_LSO_LEARNER](#).



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Maintain roles in positions

Personnel no. 1003511 Incident
Position Notify User

Delete Roles Assign roles

| Role | From Date | To Date |
|--------------------------------|------------|-----------|
| RP_S_LSO_LEARNER | 04/30/2013 | 12/31/999 |
| RP_C_HR_EMPLOYEE_SELF_SERVICE | 07/13/2016 | 12/31/99 |
| RP_C_LIMITED_PROF_USER_DISPLAY | 05/02/2017 | 12/31/99 |
| RP_S_HR_MANAGER_SELF_SERVICE | 05/02/2017 | 12/31/99 |

Select roles to assign.

| Role |
|-----------------------------|
| RP_C_PNF_BUREAU_APPROVER |
| RP_D_MM_BUREAU_BUYER_MF00 |
| RP_D_MM_BUREAU_BUYER_PK00 |
| RP_D_MM_BUREAU_BUYER_TR00 |
| RP_D_MM_BUREAU_BUYER_WA00 |
| RP_D_MM_GOODS_RECEIVER_COP1 |
| RP_D_MM_GOODS_RECEIVER_ES00 |

Additional roles.
RP_S_HR_ESS_TIME_REQUEST 06/05/2013 12/31/9999

Role(s) assigned to position 40004830
Personnel No. : 01003511
Name : Johnie Smith

SAP TRP (1) 100 sap7trp OVR

All other roles which are needed by bureaus need to be requested via Cherwell Help Desk ticket addressed to the EBS Team (use SAP Training or SAP Support as your category).



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Assigning Roles: New Hires or Transfers into a New Position

1. When a new employee is hired or moves into a new position, the OBPA processes the employee and assigns them to a position.

```
Position      : 40001767
Personnel No. : 00857056
Name          : Joshua Smith
```

2. Positions may have a set of roles assigned to them (inherited roles).
3. When the OBPA completes processing the employee in SAP, a nightly batch job processes the employee to connect them with their security details (the roles assigned to their position number). If the employee is new, SAP will create a new SAP user ID. New employees should contact the BTS Help Desk to obtain their new User ID and Password over the phone.
4. SAP User ID & Passwords: New employees will be notified by their OBPA (who puts in the BTS network access request at the new hire stage) or you, the Change Agent, of their new SAP User ID. Which person notifies the new employee is a bureau decision. Once the new employee receives their SAP User ID they should contact the Help Desk directly at 3-5199 to request a temporary password to login. Have them check to make sure that the SAP desktop GUI is on their machine and configured for access to the production client (PRP). If not, the Help Desk can also install the client and configure the GUI.
5. Change Agents can run a [security report](#) to determine if roles on an existing position should be removed or added and then request that the edits be done by SAP via the Cherwell Help Desk ticketing system. This is also true if a supervisor requests additional role functionality be given to an employee; but it is the Change Agents' responsibility to ensure that the role being requested is valid, does not conflict with an existing role on the position, and is not a security risk in the SAP system, HR rules, or finance rules. (Change Agents should also have the role RP_S_HR_BUREAU_SECURITY_REPORT to access the Security Reports noted in the instructions for assigning roles below. If you cannot access those transactions, request from the EBS Training & Development Officer this role.)

Security Reports work instructions:

<http://www.portlandoregon.gov/cao/article/464851>

The transactions each Change Agent should have access to perform this analysis function are noted below:



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- The Change Agent assigns the role as noted above by submitting a Cherwell Helpdesk Ticket. Be sure to include:
 - Specific Role Name being assigned (not a list of the transaction codes needed for the employee's function). For example:
(CO Internal Order Cost Planning has the role:
[RP_S_CO_INTERNAL_ORD_COST_PLAN]
 - The position number to assign the role to.
 - The PERNR number of the employee who is assigned to the position.
This ensures that a cross-check can be done (to make sure the employee intended is actually in the position being given the role).
- Employees who are temporary, contractors, or seasonal are special cases requiring a security exception. They should be sent to SAP as normal and will be routed to our Security Team who can custom configure their roles and create a position which is delimited.



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Assigning Roles: Manager Requests a Role or Transaction for an Employee

1. When a manager requests a role or transaction for an employee in an existing position the Change Agent does a review to determine:
 - a. Is there a segregation of duties conflict? (see <http://www.portlandoregon.gov/cao/65477> for procedures to check this)
 - b. Does assigning this role grant too much authority in another transaction or area of data?
 - c. Are there any internal controls or bureau procedures (separate from a Segregation of Duties conflict) which should deny the assignment of the requested role (or transaction)? E.G., an HR rule, Finance Rule, or Administrative Rule?
2. If the role can be assigned after these checks, the Change Agent assigns the role as noted above by submitting a Cherwell Helpdesk Ticket. Be sure to include:
 - a. Specific Role Name being assigned (not a list of the transaction codes needed for the employee's function). For example:
(CO Internal Order Cost Planning has the role:
[RP_S_CO_INTERNAL_ORD_COST_PLAN]
 - b. The position number that needs the role assigned.
 - c. The PERNR number of the employee who is assigned to the position.
This ensures that a cross-check can be done (to make sure the employee intended is actually in the position being given the role).

The Most Common, Non-Central Roles Change Agents Use

| Most Commonly Assigned, Non-Central Roles for Change Agents | |
|---|------------------------------------|
| Role Description | Role Technical Name |
| AP-Bureau AP Approver | RP_S_AP_BUREAU_CENTRAL_APPROVR |
| AP-Bureau AP Processor | RP_S_AP_BUREAU_PROCESSOR |
| AP-Retainage Processor | RP_S_AP_RETAINAGE_PROCESSOR |
| AR-Adjustment Approval Role | RP_S_AR_ADJUSTMENT_APPROVAL |
| AR-Billing Request Processing | RP_S_AR_BILLING_REQUEST_PROCES |
| AR-Bureau Customer Master Maintenance | RP_S_AR_BUREAU_CUST_MASTR_MTCE |
| AR-Check Receiving | RP_S_AR_CHECK_RECEIVING |
| AR-Material Master Maintenance Role | RP_S_AR_MATERIAL_MASTER_MAINT |
| AR-Pricing Maintenance Role | RP_S_AR_PRICING_MAINTENANCE |
| AR-Service Order Maintenance Role | RP_S_AR_SERVICE_ORDER_MAINTNCE |
| CM-Bank Accounting Reconciliation | RP_S_CM_BANK_ACCOUNTING_RECONC |
| CM-Petty Cash Custodian | RP_S_CM_PETTY_CASH_CUSTODIAN |
| CO-Internal Order Maintenance | RP_S_CO_INTERNAL_ORDER_MAINTEN |
| CO-Internal Order Maintenance-Grants | RP_S_CO_INTERNAL_ORDER_MAINTEN_GRA |
| CO-Internal Order Maintenance-Statistical | RP_S_CO_INTERNAL_ORDER_MAINTEN_STA |
| CO-Month-End Maintenance | RP_S_CO_MONTH_END_MAINTENANCE |
| CO-Spending Plans for Internal Orders | RP_S_CO_INTERNAL_ORD_COST_PLAN |
| Display All - FILO | RP_C_LIMITED_PROF_USER_DISPLAY |
| FA-Bureau Asset Accountant | RP_S_FA_BUREAU_ASSET_ACCOUNTANT |
| FM-BOBJ FM End users | RP_C_LIMITED_PROF_USER_DISPLAY |
| FM-BOBJ FM Super users | BP_S_BO_FILO_SUPERUSERS |
| FM-FM Budget Maintenance | RP_S_FM_BUDGET_MAINTENANCE |



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| | |
|--|--|
| FM-Funds Reservation | RP_S_FM_FUNDS_RESERVATION |
| FM-Year End Processing | RP_S_FM_YEAR_END_PROCESSING |
| GL-Account Maintenance Role | RP_S_GL_ACCOUNT_MAINTENANCE |
| GL-Journal Entries - Bureau Approve / Reject | RP_S_GL_JOURNAL_ENTRIES_BUREAU |
| GL-Journal Entries - Enter/Park | RP_S_GL_JOURNALS_ENTRIES_PARK |
| GL-Journal Entries - Final Approve and Post / Reject | RP_S_GL_JOURNAL_ENTRIES_FINAL |
| GM-Bureau Grant Analyst | RP_S_GM_BUREAU_GRANT_ANALYST |
| GM-Bureau Grant Project Manager | RP_S_GM_BUREAU_GRANT_PROJ_MGR |
| GM-Grant Administrator | RP_S_GM_GRANT_ADMINISTRATOR |
| HR - Bureau Security Report | RP_S_HR_BUREAU_SECURITY_REPORT |
| HR- ESS No Time Entry | RP_S_HR_ESS_NO_TIME_ENTRY |
| HR- MSS Manager Self Service | RP_S_HR_MANAGER_SELF_SERVICE |
| LSO Bureau Training Administrator | RP_S_LSO_BUR_TRAINING_ADMIN *(see below) |
| LSO Bureau Training Support | RP_S_LSO_BUR_TRAINING_SUPPORT *(see below) |
| LSO Learner | RP_S_LSO_LEARNER |
| MM-Bureau Approver 1 < \$5000 | RP_S_MM_BUREAU_APPROVER_A1 |
| MM-Bureau Approver 2 \$5000 - \$49,999.99 | RP_S_MM_BUREAU_APPROVER_A2 |
| MM-Bureau Approver 3 > \$50,000 | RP_S_MM_BUREAU_APPROVER_A3 |
| MM-Bureau Buyer - all plants | RP_S_MM_BUREAU_BUYER_ALL_PLANT |
| MM-Bureau Buyer-COP1 | RP_D_MM_BUREAU_BUYER_COP1 |
| MM-Bureau Buyer-ES00 | RP_D_MM_BUREAU_BUYER_ES00 |
| MM-Bureau Buyer-MF00 | RP_D_MM_BUREAU_BUYER_MF00 |
| MM-Bureau Buyer-PK00 | RP_D_MM_BUREAU_BUYER_PK00 |
| MM-Bureau Buyer-TR00 | RP_D_MM_BUREAU_BUYER_TR00 |
| MM-Bureau Buyer-WA00 | RP_D_MM_BUREAU_BUYER_WA00 |
| MM-Buyer Approver | RP_S_MM_BUYER_APPROVER |
| MM-Central Buyer | RP_S_MM_CENTRAL_BUYER |
| MM-Commodity Specialist Approver | RP_S_MM_COMMODITY_SPEC_APPROVR |
| MM-Contract Administrator | RP_S_MM_CONTRACT_ADMINISTRATOR |
| MM-Contract Administrator - Cable | RP_S_MM_CONTRACT_ADMINIS_MHCRC |
| MM-Contract Administrator-Auditor | RP_S_MM_CONTRACT_ADMIN_AUDITOR |
| MM-Contract Approver-Auditor | RP_S_MM_CONTRACT_APPROV_AUDIT |
| MM-Contract Approver-City Attorney | RP_S_MM_CONTRACT_APPROV_CITYAT |
| MM-Contract Approver-Commissioner | RP_S_MM_CONTRACT_APPROV_COMMIS |
| MM-Contract Approver-Director | RP_S_MM_CONTRACT_APPROV_DIRECT |
| MM-Goods Receiver - all plants | RP_S_MM_GOODS_RECEIVER_ALL_PLA |
| MM-Goods Receiver-COP1 | RP_D_MM_GOODS_RECEIVER_COP1 |
| MM-Goods Receiver-ES00 | RP_D_MM_GOODS_RECEIVER_ES00 |
| MM-Goods Receiver-MF00 | RP_D_MM_GOODS_RECEIVER_MF00 |
| MM-Goods Receiver-PK00 | RP_D_MM_GOODS_RECEIVER_PK00 |
| MM-Goods Receiver-TR00 | RP_D_MM_GOODS_RECEIVER_TR00 |
| MM-Goods Receiver-WA00 | RP_D_MM_GOODS_RECEIVER_WA00 |
| MM-Grant Approver | RP_S_MM_GRANT_APPROVER |
| MM-Purchasing Agent | RP_S_MM_PURCHASING_AGENT |
| MM-Purchasing Supervisor | RP_S_MM_PURCHASING_SUPERVISOR |
| MM-Requisitioner | RP_S_MM_REQUISITIONER |
| OM-Bureau OM Reporting | RP_S_OM_BUREAU_OM_REPORTING |
| OM-Bureau Specialist | RP_S_OM_HR_BUREAU_SPECIALIST |
| OM-HR OM Reporting | RP_S_OM_HR_OM_REPORTING |
| PA-Operating Bureau Management | RP_S_PA_OPERATING_BUREAU_MANAG |
| PA-Operating Bureau PCARD Administrator | RP_S_PA_OPERATING_BUREAU_PCARD |
| PA-Operating Bureau Personnel Administrator | RP_S_PA_OPERATING_BUREAU_PERSO |
| P&F Bureau Approver | RP_C_PNF_BUREAU_APPROVER |



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| | |
|---|--|
| P&F OM Initiator | RP_C_PNF_BUREAU_OM_INITIATOR |
| P&F PA Initiator | RP_C_PNF_BUREAU_PA_INITIATOR |
| P&F OM/PA Initiator | RP_C_PNF_BUR_OM_PA_INITIATOR |
| P&F Business Partner Approver | RP_C_PNF_HR_BUSINESS_PARTNER |
| P&F HR & Payroll Services (Central Approvers and Editors) | RP_C_PNF_HR_BUSINESS_SERVICES |
| PS-Bureau Capital Project Accountant | RP_S_PS_BUREAU_CAPITAL_PROJ_AC |
| PS-Capital Project Manager | RP_S_PS_CAPITAL_PROJECT_MGR |
| PS-Spending Plans for WBS Elements | RP_S_CO_WBS_ELEMENT_COST_PLAN |
| PY-Bureau Timekeeper/Supervisor | RP_S_PY_BUR_TIMEKEEPER_SUPERVI |
| PY-Payroll Administrator | RP_S_PY_PAYROLL_ADMINISTRATOR |
| PY-Payroll FPDR Processor | RP_S_PY_FPDR_PROCESSOR |
| PY-Payroll Manager | RP_S_PY_PAYROLL_MANAGER |
| PY-Payroll Specialist | RP_S_PY_PAYROLL_SPECIALIST |
| PY-Timekeeper Payroll Reviewer | RP_S_PY_TIMEKPR_PAYROLL_REVIEW |
| TM-Bureau FMLA Coordinator | RP_S_TM_BUREAU_FMLA_COORDINATO |
| TM-Central FMLA Reviewer | RP_S_TM_CENTRAL_FMLA_REVIEWER |
| TM-ESS - Employee Self Service | RP_C_HR_EMPLOYEE_SELF_SERVICE |
| TM-FMLA/ CATS Leave Approver | RP_S_TM_FMLA_LEAVE_APPROVER |
| TM-FPDR Administration | RP_S_TM_FPDR_ADMINISTRATION |
| TM-LTD Administrator | RP_S_TM_LTD_TIME_ADMINISTR |
| TM-Supervisor CATS Time Entry | RP_S_TM_SUPERVISOR_CATS_TIME |
| TM-Time Reviewer | RP_S_TM_TIME_REVIEWER |
| TM-Timekeeper | RP_S_TM_TIMEKEEPER |
| To see what transactions are executable in these roles, run report: | S_BCE_68002041 - Executable for Role |
| To find a which roles use a specific transaction code, run report: | S_BCE_68001420 - Roles by Transaction Assignment |

* NOTE: The role, RP_S_LSO_BUR_TRAINING_SUPPORT (or Administrator), cannot be assigned without first coordinating training through Training & Workforce Development (TWD) as opposed to the normal process of coordinating with us in EBS. So when you put in your request for roles please make sure for this specific role you have already contacted TWD and set up training for the person receiving this role. Without that confirmation on the ticket, the role cannot be assigned to the position. Contact Judy Baker-Johnson, Sheila Sylvester, or Gale Baird in TWD.



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Assigning Roles: Roles Requiring Additional Permission from Central HR

Specific HR roles (which, in some cases, also have impact on the FI side) require approval from an HR manager. Specifically, you will need permission from a Human Resources System Manager (Tom Schneider) or a substitute of equivalent level or higher. The roles requiring this permission follow these guidelines:

- the removal of structural authorization for a specific position;
- the assignment of central HCM roles to work units outside of BHR
- the assignment of administrative HCM roles used by central service providing work units (IE. Worker's Comp, FPDR, etc.) outside of those work units
- the assignment of RP_OM_BUREAU_POS1018_ADMIN to bureau staff (this was put in place due to concerns by FILO stakeholders about related posting issues)

| Role | Role Title |
|----------------------------------|---|
| RP_OM_BUREAU_POS1018_ADMIN | Modify COP 1018&MCC Position Attributes |
| RP_S_BN_BENEFITS_FULL_ACCESS | BN - BHR Benefits Staff |
| RP_S_BN_DEFERRED_COMPENS_ADMIN | BN - Deferred Compensation Administrator |
| RP_S_BN_PERS_ADMINISTRATOR | BN - PERS Administrator |
| RP_S_BN_TRIP_ADMINISTRATOR | BN - Trip Administrator |
| RP_S_HR_CENTRAL_PY_TM_BN_REVWR | Central Payroll - Time and Benefits Reviewer |
| RP_S_LSO_CENTRA_TRAINING_ADMIN | LSO Central Training Administrator |
| RP_S_OM_BUREAU_POSITION_ADMIN | OM Bureau Position Administrator |
| RP_S_OM_CLASS_COMP_ANALYST | OM-Class Comp Position Approver |
| RP_S_OM_COMPENSATION_CONFIG_SP | OM-Compensation Config Specialist |
| RP_S_OM_COMPENSATION_MASS_CHAN | OM-Compensation Mass Change |
| RP_S_OM_HR_OM_REPORTING | OM-HR Reporting |
| RP_S_OM_HR_POSITION_ADMINISTRA | HR Position Administrator |
| RP_S_OM_JOB_MAINTENANCE | Organizational Management Job Maintenance |
| RP_S_OM_ORG_MGMT_ADMINISTRATOR | OM Organizational Management Administrator |
| RP_S_PA_BHR_ADMINISTRATIVE_REP | PA-BHR Administrative Reporter -FormerlySeniorAdminSpecialist |
| RP_S_PA_BHR_DRUG_SCREENING_COOR | PA - BHR Drug Screening Coordinator |
| RP_S_PA_BHR_E&D_REPORTER | PA - BHR / E&D Reporter |
| RP_S_PA_BHR_MANAGERS_COORDINAT | PA - BHR Managers / Coordinators |
| RP_S_PA_BHR_PAY_INCREASE_ADMIN | PA - BHR Pay Increase Administrator |
| RP_S_PA_BHR_QUALITY_ASSURANCE | PA - BHR Quality Assurance (QA) |
| RP_S_PA_BHR_RECALL_ADMINISTRA | PA - Recall Administor |
| RP_S_PA_BHR_RECALL_REPORTER | PA - Recall |
| RP_S_PA_BHR_SENIORITY_ADMINST | PA - Seniority Administor |
| RP_S_PA_BHR_TECHNICIANS_DIRECT | PA - BHR Technicians & BHR Director's Executive Assistant |
| RP_S_PA_OPERATING_BUREAU_PERSONO | PA - Operating Bureau Personnel Administrator |
| RP_S_TM_CENTRAL_FMLA_REVIEWER | TM - Central FMLA Reviewer |
| RP_S_TM_CENTRAL_TIME_ADMINISTR | TM - Central Time Administrator |



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| | |
|-----------------------------|---------------------------------|
| RP_S_TM_FPDR_ADMINISTRATION | TM - FPDR Administrator |
| RP_S_TM_WORKERS_COMP_ADMIN | TM - Workers Comp Administrator |

The Special Case of Contractors

There are times when your bureau, division, or work unit will employ contractors that will need SAP access in order to do their jobs. Because contractors are not full-time employees of the City, they will often require an additional level of permissions before roles can be assigned. When requesting roles for a contractor you will need to do the following:

- Request a Contractor SAP Account be set up (if you have not already done so).
- Request the roles that they need.
- If ANY roles are HR-related, you must obtain permission from an HR Systems Manager as noted below (see the preceding section for details) and include such written permission with the role request before it is submitted. (This is because contractor roles are not restricted in their “structural authorization” because they are not attached to a City Org unit. This means if they are granted HR roles, they can see the entire city’s specific HR data viewable by the role granted.)
- Most FILO roles are assignable without special permission; however, any central roles or approver roles will require a letter of permission from the appropriate BPO. If you are unsure, check with EBS before submitting a role request.
- Coordinate with the EBS Training Officer to get the contractor registered for a class or set them up with an employee to receive on-the-job training, if needed. Be sure to communicate any OJT received back to the EBS Training Officer.



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Sample Help Desk Ticket: What Should Be Included

Below is a sample e-mail from a Change Agent requesting roles for an employee (there is also a [Role Form in Word you can download and use located here](#)). Note all of the components necessary are present: Role Names, PERNR, and Position Number.

You'll also note that the request originated with a manager and you can see the manager's request email to the Change Agent below the request.

Mail Message From: ([Hajiyev, Elshad](#)) Elshad.Hajiyev@portlandoregon.gov

FW: SAP Permissions for Diane Parke

Please assign Diane Parke following roles in SAP and arrange necessary training

| |
|--------------------------------|
| RP_C_LIMITED_PROF_USER_DISPLAY |
| RP_S_AR BILLING_REQUEST_PROCES |

PERNR 1005134

Pos# 40000746

Thanks

[Elshad Hajiyev](#)
Budget and Finance Manager
Bureau of Development Services
City of Portland
(503) 823 7323

From: [Deis, Fred](#)
Sent: Tuesday, August 18, 2015 8:25 AM
To: [Hajiyev, Elshad](#)
Cc: Parke, Diane
Subject: SAP Permissions for Diane Parke

Please request permissions granted to Diane for SAP the same as Tom Brougham and Keith Hansen?

Thank you

[Fred C. Deis](#)
Section Manager, Facilities Permit Program
Bureau of Development Services, City of Portland
Phone: 503-823-7543
Email: Fred.Deis@portlandoregon.gov

Emails sent to BTS Help Desk can automatically generate a Cherwell Ticket. But if you create your own Cherwell Help Desk Ticket (which you really should), your screen should look like this (Desktop version of the software):



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Request 56382

Status: **Closed**
Next: Mark as "Recurring"

Priority: **3**

Requestor: *Alternate Contact Info*
Hajiyev, Elshad
Elshad.Hajiyev@portlandoreg...
503-823-7323 - no phone on record - (cell)
1900 SW 4th Ave, Suite 5000

Owned By: *Assign To...*
Owned By: You
Owned By Team: SAP - Support
Charles.Dudley@portlandoregon.gov
503-865-8475

SLA: *More Info...*
Corporate
(Default SLA)
✔ Respond By: 8/19/2015 2:03 PM
✔ Resolve By: 9/1/2015 2:03 PM

I Want To:
Take Ownership Add Additional Contact
[View Date/Time Info](#) Create a Child Ticket
Link to Parent Ticket Link a Child Ticket
Add Me to Watch List
Track Time
[Mark as "Never Fixed"](#)

Record Classify Fulfill Resolve Close

Billable
 Billable Override

Step 1: Record the Details

Created by Cherwell Services Last Edited 8/19/2015 2:24 PM by Cherwell Services

Title: Call Source:

Description:
Mail Message From: (Hajiyev, Elshad) Elshad.Hajiyev@portlandoregon.gov
FW: SAP Permissions for Diane Parke

Step 2: Classify *(clear classifications)*

Service: Priority: Impact: Whenever Possible
Category: Primary CI: Urgency: Expedite
Subcategory: Due Date:

Step 3: Fulfill the Service Request

Initial Details and Troubleshooting:

You'll note that in the description field is the email message displayed above. If you click on the magnifying glass icon next to the Description field (circled), the entire email message will be displayed in a pop-up window. To view instructions for the web client, use the instructions provided by BTS here: <https://www.portlandoregon.gov/bts/65510>



Auditing Roles for Your Bureau

Each year bureaus are required to audit the SAP roles assigned to the positions in their bureau. The following roles are excluded from the report as they are not part of the role audit:

- Employee Self-Service
- Manager Self-Service
- LSO Learner and FILO Display (Professional Limited Display).

If you need to view assignments for these roles, please use the ZSEC_ROLE_ASSIGNMENTS report available to you in SAP.

You will receive a spreadsheet from EBS listing all of the roles with instructions for reviewing. Your responsibility is to ensure this list is up to date, reviewed, and signed off by either your ESC/PAC member or bureau director or designee if you do not have a PAC or ESC member. If any role changes need to occur, please contact EBS Support with your requests so we may update the role assignments.

Once the EBS training & development officer receives your approved final role audit, any deletions, additions, or changes are made in EBS.



Bureau Change Agent Responsibilities & Resources

Miscellaneous Tasks

Monday Role Change Report

Each Monday, SAP automatically generates a role change report which is sent to all Change Agents in PDF form. Change Agents should review this report to see if someone in your bureau has been added or moved and if that move resulted in a need to add or remove roles on their related position.

Roles highlighted in green are newly assigned, purple are roles they already have, and red are role deletions.

| Bureau | Position ID | Position Name | Start Date | End Date | Role | Color |
|--------------------------------|-------------|---------------------------|------------|------------|-------------------------------|------------|
| Office of the City Attorney | 40025030 | Legal Assistant | 08/10/2015 | 08/10/2016 | RP_S_HR_ESS_NO_TIME_ENTRY | 08/10/2015 |
| | | | | | RP_S_HR_ESS_TIME_REQUEST | 08/10/2015 |
| | | | | | RP_S_HR_ESS_NO_TIME_ENTRY | 08/10/2015 |
| | | | | | RP_S_HR_ESS_TIME_REQUEST | 08/10/2015 |
| Bureau of Environmental Svcs | 40019978 | Community Service Aide II | 08/17/2015 | 12/31/9999 | RP_C_HR_EMPLOYEE_SELF_SERVICE | 08/17/2015 |
| | | | | | RP_S_HR_ESS_TIME_REQUEST | 08/17/2015 |
| | | | | | RP_S_LSO_LEARNER | 08/17/2015 |
| | | | | | RP_C_HR_EMPLOYEE_SELF_SERVICE | 08/17/2015 |
| | | | | | RP_S_HR_ESS_TIME_REQUEST | 08/17/2015 |
| | | | | | RP_S_LSO_LEARNER | 08/17/2015 |
| Bureau of Development Services | 40024321 | Housing Inspector | 08/11/2015 | 12/31/9999 | RP_S_HR_ESS_NO_TIME_ENTRY | 08/11/2015 |
| | | | | | RP_S_HR_ESS_TIME_REQUEST | 08/11/2015 |
| | | | | | RP_C_HR_EMPLOYEE_SELF_SERVICE | 08/11/2015 |
| | | | | | RP_S_HR_ESS_NO_TIME_ENTRY | 08/11/2015 |
| | | | | | RP_S_LSO_LEARNER | 08/11/2015 |

MM Workflow

In the Requisition process there are three levels of bureau approvers (A1, A2, & A3) as well as commodity specialist and grant approver. These approvers are part of a workflow process that is determined by the fund center, type of item or service and the amount of the purchase entered in the Purchase Requisition. When a Purchase Requisition is created it is automatically forwarded for review to the assigned Approver(s). As Change Agent, another of your duties is to ensure that the correct Approvers are assigned to the fund centers that you are responsible for, and that changes are properly communicated to EBS Support to update the workflow table.

For instruction on how to request an update to your workflow table, please visit: <https://www.portlandoregon.gov/cao/article/445494>



Bureau Change Agent Responsibilities & Resources

System Changes in Bureau Processes or SAP

Change Agents report to SAP any changes in their Bureau Processes regarding the use of SAP. These reports help SAP identify areas for process improvement or even new functionality.

EBS, in turn, is responsible for communicating any system changes or new functionalities to the Change Agents so that you – as point of contact & communication for your bureau – can communicate changes to your affected users. This will typically be done using the Change Agents distribution list, but you may be contacted with such changes individually if only your bureau is affected.

Resources for Change Agents

- List of Bureau Change Agents:
<http://www.portlandoregon.gov/cao/63284>
- Bureau Security Reports (used by Change Agents for assigning roles):
<http://www.portlandoregon.gov/cao/article/464851>
- EBS Training & Development Officer:
Charlie Dudley: Charles.dudley@portlandoregon.gov
- Interim EBS Manager:
Diana Allen: diana.allen@portlandoregon.gov



Bureau Change Agent Responsibilities & Resources

List of Bureau Change Agents

This is the current list of Change Agents as of 1/19/2018:

| Bureau | Change Agent | Work phone | Alternate Backup |
|------------------|---------------------|--------------|--|
| Auditor's Office | Deborah Scroggin | 503-823-3546 | Dan Schmidt |
| BDS | Kyle O'Brien | 503-823-7323 | Elshad Hajiyev |
| BES | Lynne Casey | 503-823-0593 | John Maloney (MM role assgn. & workflow only) |
| BOEC | Genny Dupre | 503-823-4655 | |
| BPS | Chris Dornan | 503-823-6833 | |
| BRFS – Fin Serv | Bill Wagner | 503-823-6986 | Jack Liang |
| BRFS – Grants | Black-Craig, Sheila | 503-823-6863 | |
| BRFS – PF&T | Andrew Powers | 503-823-3101 | Michael Montgomery |
| BRFS – Revenue | Peter Scherer | 503-863-4386 | Terri Williams |
| Budget Office | Sarah Diffenderfer | 503-823-6925 | Jessica Kinard |
| City Attorney | Kim Sneath | 503-823-4047 | Crystine Jividen |
| Council Offices | Aaron Rivera | 503-823-6861 | Aaron Beck |
| Fire Bureau | Julie Prael | 503-823-3749 | Evelyn Brenes-Eayrs |
| FPD&R | Sheri Miller | 503-823-2977 | Nancy Hartline |
| Gov. Relations | Susan Dietz | 503-823-1036 | |
| Housing | Mike Johnson | 503-823-4176 | Anna Shook |
| OEHR | Kapua Foster | 503-823-5142 | |
| OMF– BHR | Mike Fryer | 503-823-6119 | Elizabeth Haynes |
| OMF – Bus Ops | Ben Smith | 503-823-5452 | Aaron Beck |
| OMF-BTS | Amy Tuttle | 503-823-7930 | Elsa Kaufman |
| OMF – Facilities | Tawnya Harris | 503-823-4352 | Aaron Beck |
| OMF – Fleet | John Hunt | 503-823-4302 | |
| OMF – P&D | Matthew Spitulski | 503-823-4449 | |
| OMF-Procurement | Scott Schneider | 503-823-6880 | |
| OMF – Risk | Tawnya Harris | 503-823-4352 | |
| ONI | Michael Kersting | 503-823-3040 | Amy Archer |
| Parks Bureau | Phil Gagnon | 503-823-2575 | Krystin Castro |
| PBEM | Keren Ceballos | 503-823-4187 | Courtney Patterson |
| PBOT | Ken Kinoshita | 503-823-7140 | Ken Lee |
| Police Bureau | Catherine Reiland | 503-823-0727 | Ryan Wojcicki Bob Del Gizzi Veronica Nordeen |
| Water Bureau | Remani Mathew | 503-823-7634 | Teri Halverson |



Bureau Change Agent Responsibilities & Resources

Definitions

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|---|--|
| Change Agent | Defined more in the document below. At the core, a Change Agent is a bureau liaison between EBS and the bureaus. |
| Cherwell | The electronic system used for requesting technical help with the City's technology systems. There is both a desktop client and a web submission system. |
| CityLearner | The City's online catalog of classes, a system for registration system, and access for employees & managers to review individual training history. |
| EBS Training & Development Officer | EBS Team member and individual charged with overseeing the training and end-user support for the City's SAP deployment. This is the Change Agent's primary contact in EBS and the coordinator of Change Agent activities. |
| Employee Self-Service | The SAP Portal on the web where employees can access online services powered by the SAP system (e.g. CityLearner or your Timesheet). |
| SAP Roles | In standard SAP Roles are defined as collections of certain activities used in different business scenarios. In the normal course of business each users is assigned with some activities and restricted to others to ensure that business data is always secure. To complete these assigned activities users need to access the different SAP transactions, reports, or Web-based applications in the SAP. To meet this requirement SAP user needs to assign a role. This role can be either assigned from SAP predefined roles or a new role can be created to meet the client's specific requirement. Some role examples: RP_C_HR_EMPLOYEE_SELF_SERVICE; RP_D_MM_GOODS_RECEIVER_COP1; RP_S_MM_BUREAU_APPROVER_A1; RP_S_TM_TIMEKEEPER; Etc. |
| Security Access | Permission to receive specific roles in SAP. |
| Segregation of Duties Conflict | No individual should have complete control over a process or the capacity to both create and conceal errors or irregularities. The built logic of our role assignment system ensures that a |



Bureau Change Agent Responsibilities & Resources

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|---------------------|--|
| | proper Segregation of Duties is maintained and conflicts are avoided. |
| Transactions | A transaction code (or t-code) consists of letters, numbers, or both, and is entered in the command field at the top of the SAP screen. Each function in SAP ERP has an SAP transaction code associated with it. A transaction code (t-code) is used to access functions or running programs in a SAP application more rapidly. By entering a t-code instead of using the menu, navigation and execution are combined into a single step, much like shortcuts in the Windows OS. |