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

ENTERPRISE BUSINESS SOLUTION
People, Process, System

Charlie Dudley, J.D. | Updated: 7/13/2017

Contents

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

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.

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).

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:

6. The Change Agent assigns the role as noted above by submitting a Cherwell Helpdesk Ticket. Be sure to include:
    o 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]
    o The position number to assign the role to.
    o 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).

7. 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.

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_ACCOUNTAN
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

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

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.

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_PERSO	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

RP_S_TM_FPDR_ADMINISTRATION	TM - FPDR Administator
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.

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):

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.

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.

Office of the City Attorney	40025030	Legal Assistant	08/10/2015	08/10/2016		
					RP_S_HR_ESS_NO_TIME_ENTRY	08/10/:
					RP_S_HR_ESS_TIME_REQUEST	08/10/:
					RP_S_HR_ESS_NO_TIME_ENTRY	
					RP_S_HR_ESS_TIME_REQUEST	
Bureau of Environmental Svcs	40019978	Community Service Aide II	08/17/2015	12/31/9999		
					RP_C_HR_EMPLOYEE_SELF_SERVICE	08/17/:
					RP_S_HR_ESS_TIME_REQUEST	08/17/:
					RP_S_LSO_LEARNER	08/17/:
					RP_C_HR_EMPLOYEE_SELF_SERVICE	
					RP_S_HR_ESS_TIME_REQUEST	
					RP_S_LSO_LEARNER	
Bureau of Development Services	40024321	Housing Inspector	08/11/2015	12/31/9999		
					RP_S_HR_ESS_NO_TIME_ENTRY	08/11/:
					RP_S_HR_ESS_TIME_REQUEST	08/11/:
					RP_C_HR_EMPLOYEE_SELF_SERVICE	08/11/:
					RP_S_HR_ESS_NO_TIME_ENTRY	08/11/:
					RP_S_LSO_LEARNER	08/11/:

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

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

- EBS Manager:
  Satish Nath: Satish.nath@portlandoregon.gov

List of Bureau Change Agents

This is the current list of Change Agents as of 7/13/2017:

Bureau	Change Agent	Work phone	Alternate | Backup
Auditor's Office	Deborah Scroggin	503-823-3546	Dan Schmidt
BDS	Elshad Hajiyev	503-823-7323	
BES	Lynne Casey	503-823-0593	
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	Diana Marshall	503-865-2493	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 Prahl	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	Carmen Merlo
PBOT	Ken Kinoshita	503-823-7140	
Police Bureau	Catherine Reiland	503-823-0727	Ryan Wojcicki Bob Del Gizzi Veronica Nordeen
Water Bureau	Remani Mathew	503-823-7634	Teri Halverson

Definitions

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

	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.