

HCM Processes and Forms Project Team Meeting NOTES



Date: Thursday, January 21st, 1:30 PM to 2:30 PM
14th Floor, EBS Conference Room

| # | Items | Who | Minutes |
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| 1. | Welcome | All | 5 |
| 2. | <p>Project Status Update</p> <ul style="list-style-type: none"> Form development in progress by MT and one by Pat Green, 2 forms completed Create Position and New Hire done first for prototype and being unit tested by EBS, 6 more forms due Forms are: Create Position, Hew Hire, Temp Appt, Rehire, Regular action, Status Change, Extention, Employee to retiree Contract Amendment to add revised timeline, budget to contract is being reviewed by City Attorney, to MT by next week for their review. <p>Next Steps</p> <ul style="list-style-type: none"> Demo 2/17 10-11:30 and 2-3:30 in auditorium, invites to go out next week. Intro- Monica, Tom - review business case, why we are doing the project, them MT will show the Create Position and New Hire forms. Core project team review of forms with MT on 2/2. Extended project team review of forms with MT on 2/9. Dry Run for all those speaking and presenting on 2/16. System Integration Testing with BHR in DRP client starts 2/29 through 3/25/2016. There is considerable to do here. Planning and script writing is in progress. Creating one script for each role and action. Resources will be needed from BHR to execute tests for 4 weeks. User Acceptance Testing with Extended Project Team and Bureaus starts 3/21 through 4/22/2016. Resources will be needed from the Extended Project Team and all Bureaus. Volunteers are welcome. A more complete timeline can be found here: http://www.portlandoregon.gov/cao/article/537251 | Monica | 15 |
| 3. | <p>Training Overview –</p> <ul style="list-style-type: none"> For OBPA's <p>Have we captured the main transactions that OBPA's use? Yes, but Kellie has some additional suggestions she will send via e-mail. Will videos be helpful to address OBPA training? Yes, it will help end user to be able to watch the videos as many times as they need to. Videos can be found here: Kellie has concerns about the new OBPA training since there haven't been any for awhile. Those classes for OM/PA are now starting up again, the next one is in February. See class schedule at end of this document.</p> <ul style="list-style-type: none"> Processes and Forms <p>Will videos be helpful to address P&F training? Yes, along with printed</p> | Charlie | 20 |

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| | materials that follow the videos. Project Team is also planning on having staffed Support Session with members from BHR and EBS to help end users. There will be more information in future as we get closer to go-live. | | |
| 4. | <p>Issues Log – If you have new issues come up please add to the issue log and EBS will review weekly, we will review as a group on a bi-weekly basis. If you have a question and you are not sure it is an issue, please e-mail Monica/De Ann and we will review. If it is an issue we will add to issues log. Once items are resolved/closed, we will include in our weekly comm to project team and in monthly stakeholder comm.</p> <ul style="list-style-type: none"> • Discuss existing items – issue 42 has an A and B part and can be dealt with separately. For item 42A recommendation is that users be allowed to use paper forms in addition to electronic forms only until the PPE 7/13, starting on 7/14 all users would have to use electronic forms. • Any new Issues? – none added | All | 15 |
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| | Action Items: | | |
| | Several issue log items assigned to Tom for resolution within the next 2 weeks | | |
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Project Plan -

Realization Phase: 12/7/2015 to 2/26/2015 – 12 weeks

- Development in SR3 client
- EBS Unit Testing – SR3
- Technical Spec sign-off
- Validating Workflow agents list from Bureaus
- Knowledge Transfer – Form and Workflow
- Planning for BHR/Bureau User Acceptance Testing
- Prototypes completed
- Other forms completed by 2/26
- Demo date 2/17/2016

System Integration Testing: 2/29/2016 to 3/25/2016 – 4 weeks

- DRP client
- EBS testing
- BHR testing
- Integration testing = testing of forms, roles, workflow
- Planning for Bureau User Acceptance Testing

User Acceptance Testing: 3/21/2016 to 4/22/2016 – 5 weeks

End User Training: 4/11/2016 to 5/20/2016 – 6 weeks

System Cutover: 5/16/2016 to 6/3/2016 – 3 weeks

Go-Live: 6/1/2016 Pilot Bureaus, 6/15/2016 All others - 4 weeks

2016 SAP Class Schedule

AP-Accounts Payable Processor | Melissa Turner, Chris Richards

TBD

AR-Agreement and Billing Request | Peter Scherer & Sean O'Reilly

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| 3/1/16 | 4/26/16 | 10/6/16 | | | |
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BOBJ Introduction (Super-User Training) | Charlie Dudley

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| 3/16/16 | 6/20/16 | 10/10/16 | | | |
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CO/FM - Internal Orders, Internal Services, & Bureau to Bureau | Bill Wagner

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| 3/3/16 | | | | | |
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FA-Asset Accounting | Sharon Nickleberry Rogers, Jeff Minor

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| 4/28/16 | 10/13/16 | | | | |
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GL-Journal Entry Processing | Devra Staneart

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| 1/14/16 | 4/18/16 | 7/12/16 | 10/12/16 | | |
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MM-Contract Process | Jeff Blade

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| 1/12/16 | 4/5/16 | 8/9/16 | 10/18/16 | | |
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MM-PO Process Distributed | Cate Antisdal

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| 1/21/16 | 5/2/16 | 7/18/16 | 10/11/16 | | |
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MM-Requisition Process | Paula Wendorf, Kristan Burkert

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| 1/26/16 | 3/8/2016 | 4/19/16 | 7/19/16 | 9/20/16 | 11/1/16 |
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PA-Maintain HR Master Data | Victoria Duffey

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| 2/9/16 | 4/27/16 | 7/14/16 | 10/4/16 | | |
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TM-Timekeeping Process | Ryan Wojcicki, Lisa Howard

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| 1/19/16 | 3/10/16 | 5/18/16 | 9/15/16 | 11/2/16 | |
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