

CHANGE AGENT UPDATE: SPRING 2016



Spring is in the Air

In this edition, we have information on:

- Processes & Forms – including a video “sneak peek” of the forms
- Document Storage update relevant for Finance Users
- A little-known and underused Tip on MM Approver substitutes (includes video instruction)
- News on the *NEW* Financial Accounting Users Group (FAUG) restarted this month.
- Links to Video Instructions for the most common OBPA actions



Our next update for summer will be issued the second week of June.

+ Charlie

EBS Projects

Processes & Forms (HR)

Rehire an Employee: Employee

Check Send Save Draft Cancel Form Utilities

Attachments (0)

Hire an Employee (US)

New Hire

* Reason Code: Process Reference Number:

Pers. Number:

Begin Date: 03/07/2016 Assignment End Date:

Requested Action(s) - Check all that Apply

Type of Appointment

* Temporary HR 3.03

* Casual Other HR 3.03

* PERS Retiree HR 3.06

* Recruitment/Other HR 3.03

* Reinstatement

Requested Status For This Employee

* New Hire Position: 00000000 Position End Date:

Double Fill Position: 00000000

Job No: 00000000

Over Under Later - Job: 00000000

Personnel area: Pers. Sub Area:

Employee group: Emp. Sub Group:

The objective of the SAP HCM Processes and Forms project (P&F) is to leverage new SAP technology to make the business, approval, and auditing processes surrounding employee personnel changes more efficient, accurate, and transparent. We expect to go-live in June 2016.



P&F will concern only the PAR form and a portion of the OM Maintenance form and will not include automating the I-9 or W-4 forms. We have prepared a “sneak peek” look at this new functionality. You can see what the forms will look like by clicking this link: https://youtu.be/zS5XFFyB_GA (6:18)

Look for more information in the next few days announcing User Acceptance Testing that start toward the end of March.

Enterprise Asset Management (Facilities)



The EAM project is in the RFP stage. The RFP that was developed in partnership with subject matter experts has been posted. It will be out for one month at which point the Phase I evaluation process will begin.

The purpose of this project is to implement functionality to manage the City of Portland’s portfolio of property in a central place as well as leases for OMF Facilities Services, replace OMF Facilities Services unsupported work order system with an asset management system, and utilize SAP to provide more useful information to Project Managers. These modules integrate together well with current financial modules in place.

[EAM Project Page](#)

- [Project Details](#)

Document Storage Improvements Project (FILO)

Document storage using SAP Content Server went live October 1st. The new document storage server reduces the burden on storing attachments within SAP by moving documents to a content server separate from the main SAP application server.

We received a great deal of feedback and made the following improvements that went live March 4th:

- Open attached Adobe PDF files using a web browser allowing for multiple files to be viewed without taking up SAP sessions
- Auto populate the file name when attaching files and have it display in the attachment list
- Less prompts to delete a file making it faster and easier
- Increased file attachment size to 100MB

[Document Storage Page](#)

- [FAQ](#)
- [Project Details](#)

Financial Accounting Users Group (FAUG) Has Begun!

The inaugural meeting of the Financial Accounting Users Group was held on Wednesday, March 9 at the Portland Building. The inspiration for the group came from the Controller, Michelle Kirby, as part of the Accounting Division's reorganization and vision of support for bureaus. Part of that support function is for Accounting, in partnership with EBS and bureau subject-matter experts, to provide a forum for education, professional development, and discussion of important issues.



The meeting included discussions of the Accounting Quick Reference Guide, The Life Cycle of a Capital Project, and All About Advances (including a demo of a new SAP report, ZFMA).

The meeting was a great success and the feedback we have received has been excellent. FAUG will meet quarterly and the forum is designed to be more than simple presentations and lectures, but dialogue and conversation around finance topics and issues.

At the end of each meeting finance users – whether you can make the meeting or not – will receive a copy of the slides from the meeting as well as any support documents used. We encourage you to attend whenever you can, to provide topics for future meetings, and – of course – we always welcome people who wish to present a topic.

If you have questions about the FAUG, contact [Jack Liang](#) in the Accounting Division.

Training News

EBS Training Room

Beginning the week of March 14th until May 26th the Processes & Forms project will be using the room for unit testing and training. Those sessions, unfortunately, cannot be moved or altered. So if you or your team needs to reserve the training room, it won't be available again until after May 26th.

Video Instructions: OBPA Common Actions

Until the EBS team begins the process of updating and revising all of our current documentation, we know that new OBPA's could use some support when beginning their new role. We've prepared some instructional videos on some of the most common OBPA actions. If you are an OBPA or know of one who could use these instructions, please pass this information along.

- [Display HR Master Data \[PA20 \]](#)
- [Input a Nickname \(Preferred Name\) for Display in Outlook \[PA30 \]](#)
- [Making Changes to Employee Record to Update Active Directory \(Outlook\) \[PA30, PQ13 \]](#)
- [Emergency Contact Information Maintenance & Reporting \[PA30, ZHRT_COOP \]](#)
- [Create Object Manager Hit List \[PA20, PA30, & PA40 \]](#)
- [Personnel Actions \(Sample New Hire\) \[PA40 \]](#)
- [Positions by PA Report \[ZHRT_POSITIONS_BY_PA \]](#)
- [Display Headcount Changes \[S_L9C_94000095 \]](#)
- [Job Class Anniversary Date Report \[ZHR_DATEJOBCLS \]](#)

Tip of the Quarter

Requisition Approvers: Creating Substitutes for Workflow

Did you know that Requisition Approvers can designate a substitute for planned absences? Many folks are unaware of this function. In response, some bureaus have added extra approvers to the permanent work flow. But you may not need extra approvers in your workflow because of the ability to substitute. The steps to create a substitute are easy.

Click here to view a document explaining Workflow Substitutes:

<http://www.portlandoregon.gov/cao/article/461684>

Or view a video instruction here:

<https://youtu.be/dwUWSBbYDAw>



Online Resources: Change Agents

- ▶ [Bureau Change Agents](#)
- ▶ [Change Agent Guide](#)
- ▶ [Change Agent Resource Page](#)

Online Resources: All Users

- ▶ [SAP Documentation](#)

SAP Manager:
Satish Nath

FILO Team Lead:
Cindy DeLozier

Training & Development Officer:
Charlie Dudley, J.D.

HCM Team Lead:
Kate Schmidt

If you have any questions,
please contact Charlie,
charles.dudley@portlandoregon.gov.

▶ [Complete Team Contact List](#)