Ohio DAS
Department of Administrative Services

Human Capital Management

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HCM OAKS User Group

February 22, 2010

Human Capital Management

Vicki Friesland

HCM Administration

- Question and Answer

- Revised Personnel Action

- Revised Action/Reason Matrix
  - Revised Chart for TWL, Internal/External Interims and Temporary Appointments (Job Aid HCMJA181)

- Revised Payroll Letters
  - Health Insurance Coverage and Revised State Rates

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Last Day Worked (e.g. "Termination Date" in OAKS Job Data)	**Health Care Coverage End Date**	
	EEs Enrolled in June 2009	**EEs Enrolled ON OR AFTER July 1, 2009**
July 01 - 31	August 31	July 31
August 01 - 31	September 30	August 31
September 01 - 30	October 31	September 30
October 01 - 31	November 30	October 31
November 01 - 30	December 31	November 30
December 01 - 31	January 31	December 31
January 01 - 31	February 28/29	January 31
February 01 - 28/29	March 31	February 28/29
March 01 - 31	April 30	March 31
April 01 - 30	May 31	April 30
May 01 - 31	June 30	May 31
June 01 - 30	July 3	June 30

Deven Mehta

Business Intelligence Implementation Project

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Agenda

- Project Update - Deven Mehta
- Business Intelligence Shared Council (BISC) Overview
- Requirements Overview
- Training Plan
- Agency Expectations
- Q&A

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Business Intelligence Program Overview (Big Picture)

Phase 1A
Element Goal:
Requirements; Design; Baseline Implementation

Phase 1B
Element Goal:
Production Migration; Mart Expansion; Tool Enablement; Privacy & Infrastructure

Phase 1C
Element Goal:
Extend Marts; Decommission EPM 8.9

Phase 1D
Element Goal:
Report Enhancements; Enhanced Training

Phase 2A
Element Goal:
Decommission OAKS Shadow Data Replicas; Integrate OAKS/Agency Specific Data

Business Intelligence Shared Council (BISC)

Gate: Approve Business Case for Future Implementation Activities (cost, phasing, strategy, implementation and decommissioning plans)

Program Focus

	Implementation Roadmap / Foundation	Gate	Additional FIN/HCM Marts	Expansion & Decommission	Agency Enablement	Future Phases
	1A		1B	1C	1D	2....
High-Level Activities	Business Roadmap/ High level Requirements BI Reporting Strategy & Solution Long-term Design HB648 Analysis Installation of EPM v9.0 Subsequent Phase Business Case(s)		Extension of EPM v9.0 Implement HB648 Elements Implement Addl. Modeling & Query Tools Implement Hardware / Software Production Migration (IA)	Extension of EPM v9.0 Decommission EPM8.9	Transition State Agencies Backfill Agency Analysts Implement Oracle Training / Workshops	Agency Data Integration
Solution Focus	General Ledger Workforce Profile Travel & Expense		Accounts Receivable Accounts Payable Compensation Draft	Planning & Budgeting Spend Procurement Draft	Additional Analytical / Reporting Needs Delivered Report Enhancements	

Communication & Training

PROGRAM HIGHLIGHTS:

- Focusing on iterative development with a gating point at the end of Phase 1A; to minimize risk and to ensure agency needs are being met.
- Current 8.9 environment will continue to run in parallel, with phased decommissioning (90 days) as new marts are implemented.
- A key objective of the Program is to move away from the physical layer being the user front-end (which is an exact copy of the PeopleSoft HCM/FIN physical data model) by utilizing a presentation layer that acts as a second layer of abstraction that sits on top of a Business Model - thus organizing and presenting metadata more intuitively to the business users, making navigation of the Subject Areas easier and enabling self-serve analysis and reporting.

KEY ASSUMPTION:

- Agencies will fund and develop non-standard, Agency specific reports.

Regarding the Program Overview...

- Phase 1A is part of a larger program to overhaul Business Intelligence for OAKS
- Phase 1A establishes the foundation of the program by laying out a reporting strategy, plan for BISC organization, and roadmap for future phases
- Phase 1A delivers 3 functional marts in the mid-July timeframe
  - ❑ 2 are the foundational marts of FIN and HCM (General Ledger & Workforce Profile)
  - ❑ 1 addresses an immediate reporting gap (Travel & Expense)
- Phase 1A addresses the communication and training that are critical to agency-readiness

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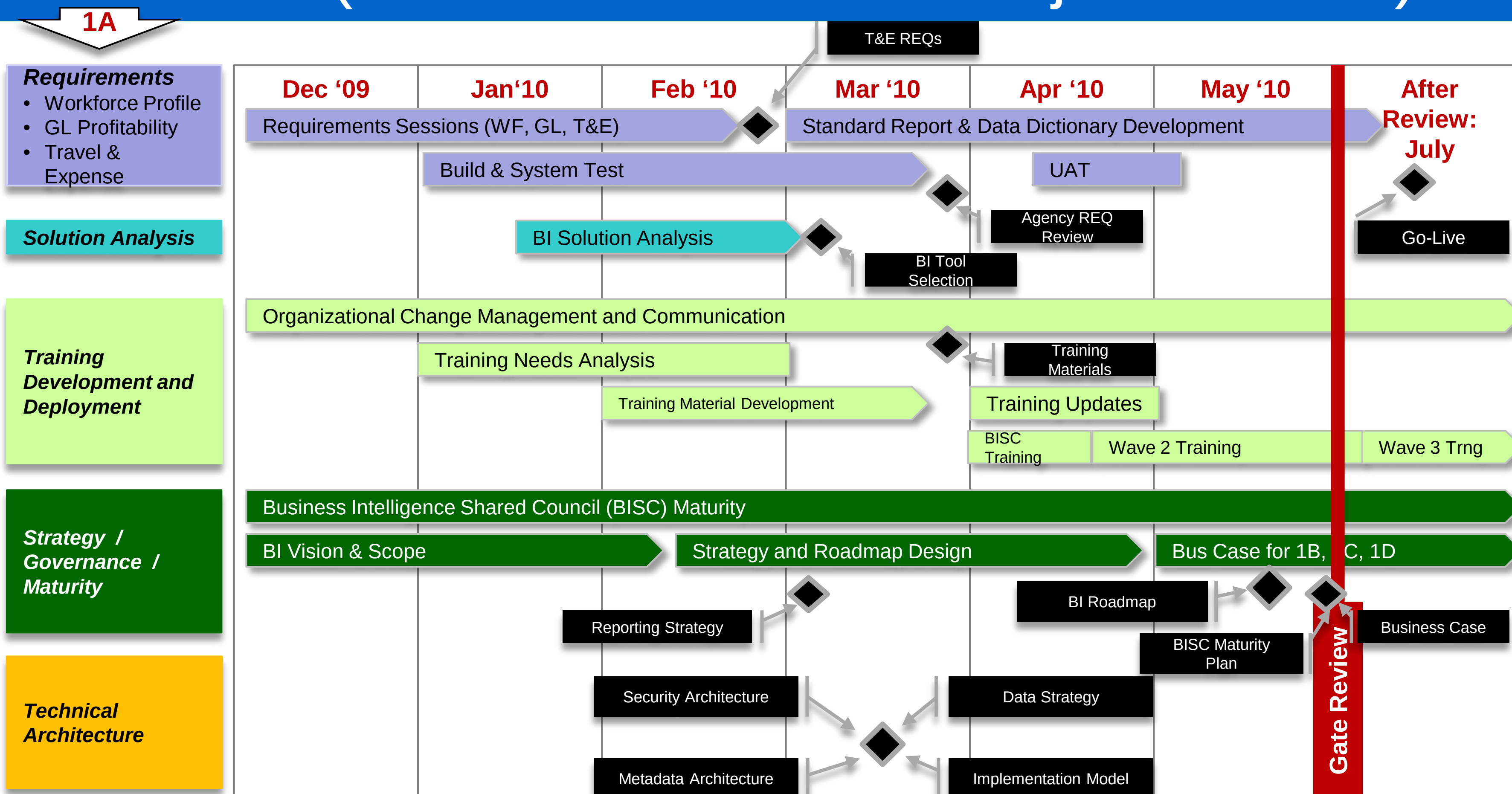
Business Intelligence Project (Phase 1A Overview – Major Activities)



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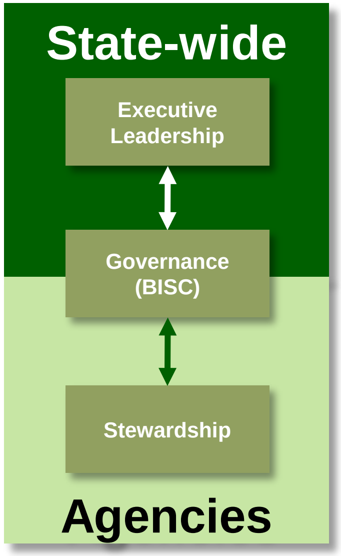
Business Intelligence Shared Council (BISC)

Purpose:

- ***The BISC is a shared decision-making body (consisting of representatives from 17 agencies) that will identify and represent the common data needs of state agencies. The BISC will evolve through three major areas of maturity:***
  1) getting the data integrated, 2) developing consistent measures across the agencies, and 3) applying analytical insights to decisions in the business process.

- BISC focus in Phase 1A includes:
  - ✓ Establishing common vocabulary to help users know they have the right data
  - ✓ Maintaining OAKS-wide values for common reference data
  - ✓ Creating metadata management practices
  - ✓ Arbitrating shared data questions

- Representation and inclusion of non-BISC agency requirements and involvement is facilitated through review and circulation of requirements documents via BISC Chairpersons, **user forums**, training, stakeholder meetings, and various agency communications.



What does this mean?

- The BISC is a critical organization for the success of the BI Implementation project
- They represent state agencies/users as a whole and serve as the single point of contact to the project team.
- They have begun to establish common definitions and standard reports
  - Common definitions improve the understanding of data in the BI solution
  - Standard reports enable all agencies to report information using the same logic
  - Standard reports reduce much of the report creation rework where multiple agencies create their own version of the same report
- They provide a vehicle and cohesive organization by which reporting can improve business processes and source system data
- End users at both BISC and non-BISC agencies can work through the BISC to enact action in the OAKS BI program

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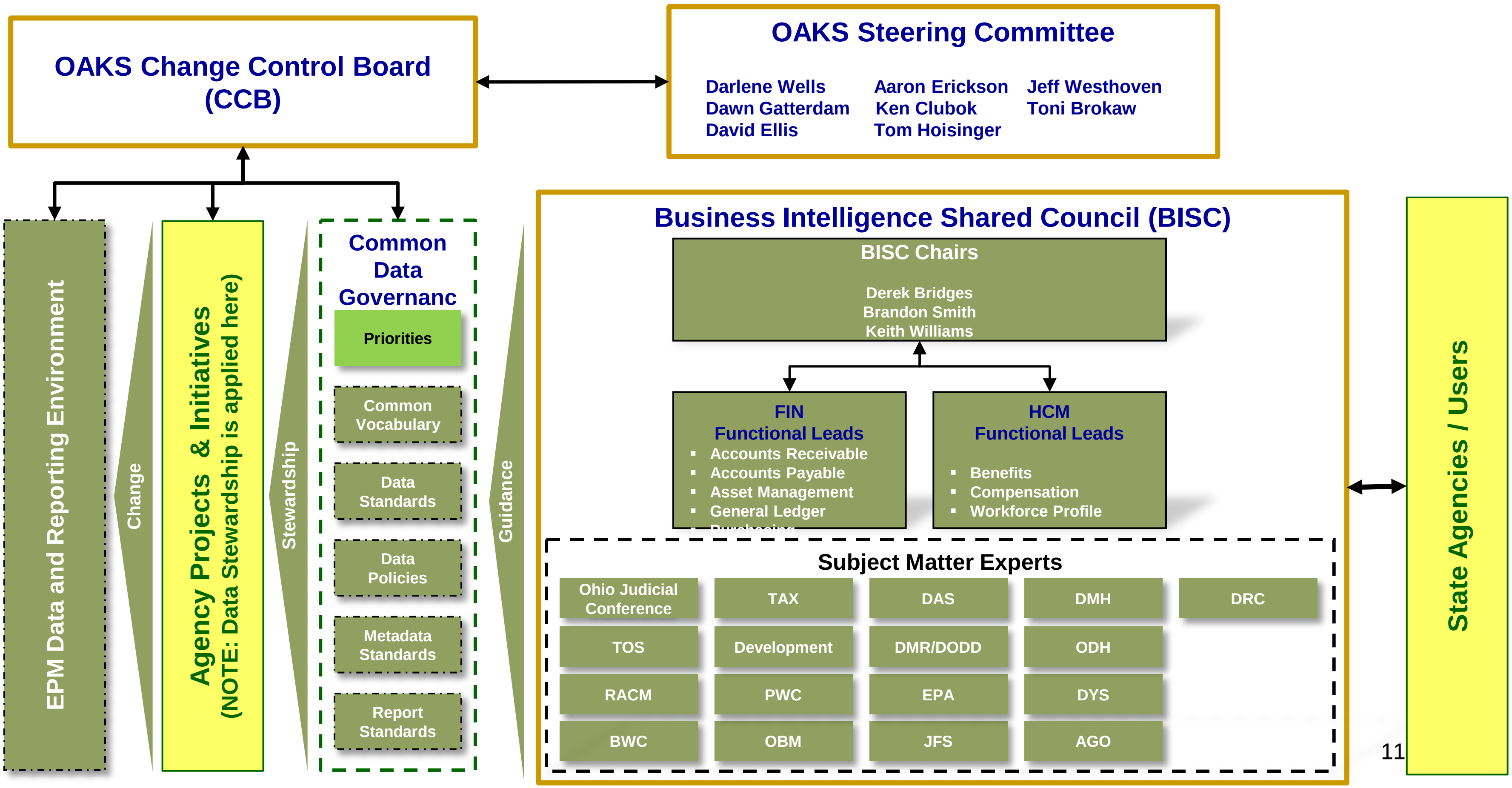
Business Intelligence Shared Council (BISC) Structure



Requirements Gathering & Validation

Purpose:

- Define requirements related to Workforce Profile, General Ledger, and Travel & Expense Marts for Phase 1A
- Collect agencies' reports to further refine requirements and consolidate similar functioning reports to be used as an input to standard reports' design and build
- Collect high level requirements for Procurement, Spend, Inventory, AP, AR and Compensation Marts as an input to the *Business Intelligence Roadmap.*

Requirements sessions:

- Requirements for Phase 1A were reviewed with the BISC on the following dates:
  - Workforce Profile: 12/16, 1/15, and 2/10
  - General Ledger: 12/22, 1/12, and 1/16
  - Travel & Expense: t.b.d.
- Phase 1A requirements will be reviewed with non-BISC agencies in the March timeframe.
- We will hold requirement sessions for the future data marts in the July timeframe. (tentative)

What does this mean?

- Future collaboration with BISC and Steering Committee will include:
  - Creation relevant and valid test scripts to test new BI environment
  - Participation in User Acceptance Testing and analyze results
- Requirements will be reviewed with non-BISC agencies via circulation by the BISC chairpersons in the March timeframe
- Though the BISC represents varied agencies, much of the requirements have been found to be common across agencies
- New requirements will be considered for future implementations while critical day-to-day business requirements not met can be delivered by the 8.9 solution

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Proposed Standard Workforce Profile Reports

Report Area	Proposed Report Name
Workforce Composition	EEO Workforce Composition
Workforce Composition	EEO Hourly Rates
Workforce Composition	Multi-Racial Categories
Workforce Composition	Employee Age
Workforce Composition	Length of Service
Workforce Composition	Average Compensation Rate
Workforce Composition	Employees at Max Salary
Workforce Composition	Education Levels
Workforce Composition	Ratio of People Per Classification
Workforce Composition	Top 5 Classifications with Highest Longevity
Workforce Composition	Top 5 Most Populated Classifications
Workforce Composition	Bargaining Unit Seniority Roster
Position Management	Top 5 Classifications with Highest Turnover
Position Management	Filled/Vacant Positions
Position Management	Vacancy Rates
Position Management	Position History
Position Management	Position Control Roster
Position Management	Hires/Separations

Report Area	Proposed Report Name
Position Management	Retention Rate
Position Management	Average Supervision Span of Control
Time Reporting	Time Reporting Code Usage
Time Reporting	Grouped Time Reporting Code Usage
Time Reporting	Hours <> 80
Time Reporting	Hours Worked by Appointment Type
Time Reporting	Staff Utilization
Movement	Action Reason Code
Movement	Action Reason List
Employee	Employee History
Employee	Employee Demographics
Employee	Employee Lookup
Employee	Employee to Position
Employee	Employee to Supervisor
Position Management	Position Funding Details
Position Management	Retirement Projections
Position Management	Staffing Requirements Report
Workforce Composition	Staffing Rate - Disability

Detailed list of Workforce Profile Standard Reports is available upon request. ***Note: There are also 10 "nice to have" reports in consideration.***

Training Approach

Purpose:

- Increase analytical reporting knowledge in reporting users across the state
- Ensure the right people have the right training on the reporting solution
- Educate reporting users on how to use the reporting decision tree

Major Milestones / Key Decision Points for the Steering Committee and BISC:

- **Definition of the training curriculum [2/19/10]**
- **Prioritization of users (tier 1, tier 2) [2/26/10]**
- **Definition of draft course materials [3/26/10]**
- **Final course materials [4/23/10]**

Expectations:

- Gather contacts from agencies not involved in the BISC to aid the training deployment
- Require reporting users to attend training

What does this mean?

- Many training courses will be offered as a part of Phase 1A with the training tailored toward the needs of the user based on their role
- Training will be offered both prior to implementation and post go-live
- Phase 1A uses an improved data model and better presentation layer. Attending training will help the users leverage these improvements
- 8.9 EPM environment will remain in place after Phase 1A go-live to ensure user needs are met until adequate training has occurred

Deployment Approach

	Training Waves and Details
Pre-UAT	▪ **Timing:** Coordinated with UAT timeframe ▪ **Audience:** BISC members ▪ **Sessions:** ~24 Instructor-led
Tier 1	▪ **Timing:** Pre-Production (July timeframe) ▪ **Audience:** Tier 1 Users - critical users, Tier 2 users can attend virtually-led training and take eLearning courses. ▪ **Sessions:** ~78 (~70 Instructor-Led and Lab, ~8 Virtually-led)
Tier 2	▪ **Timing:** Post-Production / Stabilization (Post-July) ▪ **Audience:** Tier 2 Users ▪ **Sessions:** ~67 (Instructor-Led, Virtually-led, Labs
Others	▪ **Timing:** Ongoing training ▪ **Audience:** All users ▪ **Sessions:** ~64 **(**Instructor-Led, Virtually-led, Labs)

Course #	Proposed Training Curriculum
BI 101	**Business Intelligence Overview (2 HRS)**
BI 102	**BI Tool Navigation (2 HRS)**
BI 103	**Data Model & Data Dictionary (3 HRS)**
BI 104	**BI & Dashboards for Managers & Execs**
BI 201	**Query Building (3 HRS)**
BI 202	**Report Building (3 HRS)**
BI 301	**Advanced Queries and Reports (4 HRS)**
BI 302	**Analytics Lab (4 HRS)**

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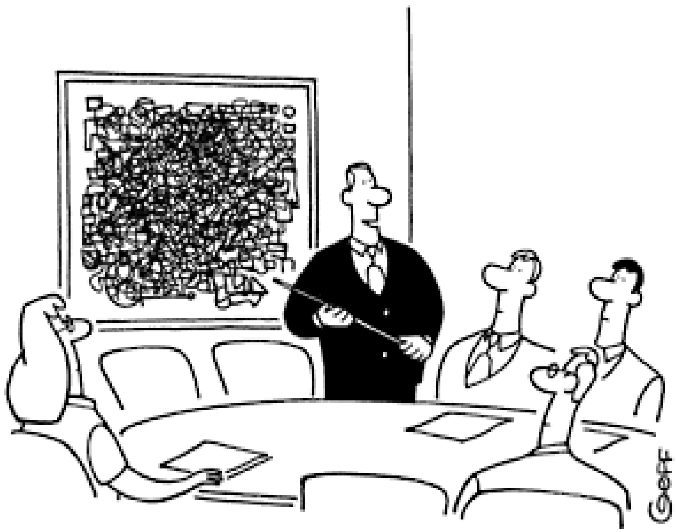
Expectations of Agencies

Agencies need to identify an "Agency Business Intelligence Contact" who will:

1. Serve as Communication *point of contact* to the Business Intelligence Shared Council (BISC) and Project Team
2. Confirm agency's user *training needs* related to Workforce Profile, GL & Profitability and Travel & Expense Marts for Phase 1A. Specifically, each user's:
   - Contact information (location and e-mail address)
   - Training role and priority
   - Training course needs
3. Attend Business Intelligence *Requirements Demonstration* (March timeframe)
4. Facilitate communications and understandings among the agency's users regarding what training is available and recommended for each of the agency's users.

We are working with OBM and DAS/HRD to send a request to Agency CFOs and/or HR managers to facilitate the identification of each agency's BI Contact. We are also setting up a web pages to facilitate communication and collaboration with all agencies.

Questions / Answers



"And that's our plan. Any questions?"

For additional information, please contact:

Deven Mehta – Deven.Mehta@oaks.state.oh.us

Kathleen Madden

DAS/HRD Policy Development

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HCM General Updates

- Pre-note no longer required
- Cost Savings Days
  - Usage thus far by agency

CSD Management Reports

- Public Folders>OAKS HCM Operational Reporting Warehouse (ORW)
  - **PYCG014-CSDLV-Used-Aggregate** – total number of hours used per employee.
  - **PYCG016-CSD Balance** – looks at the balance plan on Review Accrual Balances then reports the available hours.

CSD Statistics

- Out of 50,998 employees statewide...
- Zero balance – 27,067
- With balance – 4,377 Exempt + 19,554 Bargaining Unit (5,795 are 3, 4, or 5 unit employees)
- 40.0 – 79.9 hours balance = 4,624 employees
- 80.0 hours balance = 431 employees
    - 75 Exempt, 356 Bargaining Unit

Employees With Balances

AGO	632	DNR	688	DYS	1098
BWC	1126	DOH	593	EPA	568
COM	379	DOT	2292	JFS	1677
DAS	331	DPS	1894	RSC	675
DMH	1278	DRC	6345	TAX	597

Anne Chernauskas

Position Management

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Simplified Childbirth Adoption TRCs

- New Childbirth Adoption TRCs effective 2/28/2010
  - CHBAD replaces ADPLV, BIRTM, and BIRTD
  - FMCAL replaces FMADP, FMBRM, and FMBRD
  - Continue to use ADSCK and FADSK to supplement.
  - New Job aid will be posted to OAKS job aid site on 2/26

Janet Wampler

State Payroll Manager

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Payroll Update

- Thank You for Job Well Done
- HCM Payroll Training
- OH_PYQ31_EXTRACT_ADD_PAY_NO_ED
- Remaining Comp Time Issues
- Sep Chk #9

Jerry Miller

OAKS HCM Service Assurance Manager

Stabilization Analysis Findings

Key Areas of Strength

(sorted in decreasing relative importance)

1. Users feel that their level of **access to OAKS and access administration** is a significant strong point of the system
2. **OAKS availability and uptime** are viewed as positive in the use of the system. Users have asked for extended hours daily and in particular prior to regular business events
3. Users feel that **OAKS communicates effectively** when processing exceptions or outages occur
4. **OAKS job aids and functional training** (when conducted) are viewed as positive differentiators. Users have asked for more and more advanced training as well as a refresh of OAKS job aids.
5. In general **OAKS application features and functions** meet Agency needs and support their mission(s) with some users requesting simplification of OAKS workflows and enhancements to edits to catch/correct errors
6. The **response time for online transactions** is viewed as reasonable and consistent with Agency needs and expectations (with reporting response time in need of attention).

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Key Challenge Areas

(sorted in decreasing relative importance)

1. **EPM and Enterprise Reporting** had the lowest satisfaction rating by users with regard to supporting Agency reporting needs and eliminating internal Agency systems
2. **EPM / Cognos training** is required to better enable agencies to access data contained in OAKS. Agencies find OAKS data difficult to access, manipulate and reconcile to internal systems.
3. **Payroll processing** (data entry, system checks and edits and cutoffs) **could be improved** to catch errors upfront and result in more accurate processing.
4. OAKS has not eliminated internal Agency systems due to **trust in data, availability of reports / reporting**, and functional footprint gaps.
5. **Awareness of OAKS future plans**, contents of releases, projects, roadmap and schedules need to be better communicated.
6. **Multiple calls and emails to** Functional, OIT, OAKS **help desks** are required to address issues (particularly complex ones).
7. **Functional training and job aids need revision / enhancement** to be more relevant to day-to-day activities

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Initiative Summary

Stabilize

- Comp Time issues
- Payroll system/software process stabilization
- Payroll processes stabilization review
- HR /Ben system/software process stabilization
- Human Resource process review – in OSS HR project
- Alert wording content for agencies
- Job execution schedule communication
- Manual Check production analysis
- Overall Communications Strategy
- Refreshed beginner and advanced training for agencies

Leverage

- HCM lab support
- Training for internal HRD staff
- Refreshed Job Aids
- EPM/Cognos Review
- HR Advisory Council

Extend

- Agency supplemental system reviews (e.g. JFS)
- Payroll distribution report
- Standard report analysis
- Analyze potential development of an HCM web blog
- Agency system access on “Confirm” Friday

Upgrade

- Help Desk Processes and organization
- Agency payroll review
- Agency HR review
- Historical Paycheck View

Optimize

- Continuous Improvement
- User Satisfaction Survey
- Balanced Scorecard Measurement

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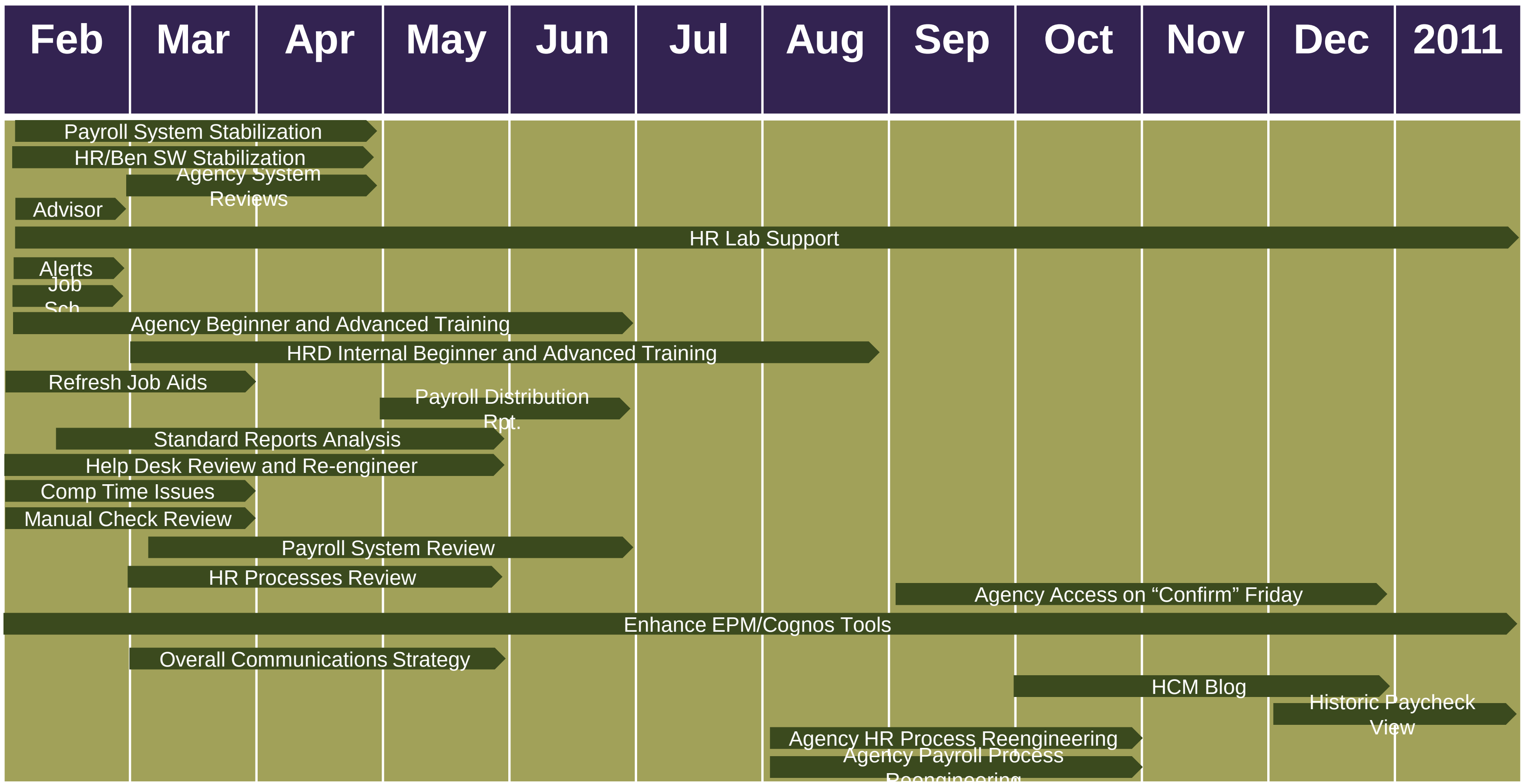

Q&A

- Q: Health Insurance coverage ending date is determined by chart in payroll letter 938, regardless of type of separation (retirement, removal, or resignation). If an employee separates that was enrolled in coverage in June 2009 and later is rehired, will he/she receive the additional month of coverage?

- A: The employee would receive the additional month of coverage for his/her first separation but any subsequent re-hire/separation actions would place the employee in the employee enrolled on or after July 1, 2009.

- Q: I was covered on June 30, 2009 but it was as a dependent on my spouse's coverage. He has retired and I enrolled in individual coverage due to the OPERS age limitation for spouses – will I receive the additional month of coverage when I separate?

- A: No, this only applies to the employee with the coverage and not dependents enrolled prior to July 1, 2009.

- Q: Do agencies need to send phone numbers & email address to HCM Agency Support if not these fields were not populated when the PA was sent?

- A: No, agencies can update these fields in OAKS – no need to send to HCM Agency Support.

- Q: When are the retirement contributions sent from DAS to OPERS (and other retirement systems)?

- A: Pay Fiscal Services are not in attendance but they will be contacted for the answer.

- Q: What is the last day to use Cost Saving Days for FY2010?

- A: This day has been negotiated as June 30, 2010 but there are potential issues with adding new CSD balances. Agencies are encouraged to have their employees use CSDs sooner rather than later – HRD Policy is working with OCB to negotiate a fix for FY11.

- Q: When can employees begin using FY11 CSDs?
- A: After July 1, 2010.

- Q: Please provide a status update of W2 reprints.
- A: 300 reprints were completed over the last 2 weeks; about 120 were reprinted today. If you have any issues with a reprint request, contact Dave Rust.

- Q: Explanation regarding the missed health care deduction letter.

- A: Additional information regarding the health insurance rate adjustment is forthcoming.

- Q: What are the dates for Open Enrollment?

- A: The dates for Open Enrollment 2010 will be sent out to you as soon as finalized.

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Schedule for 2010

- Go Sign Me Up – attend in person
  - http://trainreg.das.ohio.gov/
  - State Library, Conference Room D, 2:00 pm to 4:00 pm
- Webinar – attend electronically
  - February 22, 2010 https://www2.gotomeeting.com/register/840497202
  - April 26, 2010 https://www2.gotomeeting.com/register/909912955
  - June 14, 2010 https://www2.gotomeeting.com/register/467481874
  - August 23, 2010 https://www2.gotomeeting.com/register/826841378
  - October 18, 2010 https://www2.gotomeeting.com/register/190913034
  - December 13, 2010 https://www2.gotomeeting.com/register/965673075