

# MEETING MINUTES

## SCEIS Reporting User Group (RUG)

**Date:** Tuesday, October 11, 2011  
**Time:** 9:00am – 12:00pm ET  
**RUG Chair:** John Taylor, B&CB-OIO

**FI Location:** Did not meet due to GFOA conflict  
**HR Location:** SCDMV, Room CG52  
**MM Location:** DSIT, Room 202 A+B

Invitees / Attendees:			
Community of Interest	FI	HR	MM
Sub-Group Lead:		✓ Sam Wilkins, OHR	Voight Shealy, MMO
Executive & Administrative:		Ed Pope, B&CB-IO ✓ Kelly Watkins, OHR ✓ Kevin Paul, OHR	✓ Norma Hall, MMO ✓ John Stevens, MMO ✓ Carol Norfleet, MMO ✓ Karen Roberts, B&CB-IO ✓ Pam Fambro, B&CB-DSIT (Inv)
Education:		Leesa Benggio, State Library Eric Moore, VRD	✓ Tracy Hill, Tech Board ✓ Tim Russell, VRD (Inv) Michael Cupp, VRD
Health/Social Rehabilitation:		Tonya Chambers, HHS Jon Fisher, DHEC Robin Owens, DMH Kimberly Washington, DMH Ken Branham, HHS	Janet Watkins, DMH ✓ Ashley Bishop, DMH
Judicial/Corrections/ Criminal Justice:		Patricia Thrailkill, SCDC Teresa Kitchens, DPS ✓ Patricia Stephens, DPS ✓ Joe Morris, DPS ✓ Laura Wilson, DPS ✓ Stephen Fulmer, DPS	✓ Cathy Sprowls, DPS Cathy Lucas, DMV Ruthie Bishop, SCDC ✓ Steve Pullie, DJJ Jeneann Adams, SCDC (Inv) Eddie Huddle, SCDC (Inv) ✓ Travis Boone, DMV (Inv) ✓ Bruce Dorman, DPS ✓ Kathy Johnson, SCDC (Inv) ✓ Randy McElveen, SCDC (Inv)
Conservation/Natural Resources/ Development & Transportation:		✓ Georgette Rivers, Agriculture Lisa McCloud, Forestry	✓ Jamie Jackson, PRT
Regulatory:		✓ Dottie Blankenship, DMV ✓ Lane Small, DMV ✓ Paige Stephens, DMV ✓ Melinda Woodhurst, DMV Kerry Paul, DEW ✓ Nancy Wilson, DOR ✓ Terri Davis, DOR ✓ Ron Bowen, DEW ✓ Adam Garrett, DEW	✓ Sandra Wright, DHEC ✓ Jaquetta Wright, DOR ✓ Tripp Clark, DHEC
SCEIS SME:		Larry Mallett, SCEIS-HR Brandy Aull, SCEIS-BW ✓ Andy Shaw, SCEIS-BW	✓ Wanda Dixon, SCEIS-MM ✓ Kimber Craig, SCEIS-PO ✓ Linda Branch, SCEIS-BW ✓ Becky Ferguson, SCEIS-MM ✓ Sonia Young, SCEIS-MM ✓ Neil Hoare, SCEIS-MM ✓ Jeff Hansen, SCEIS-BW ✓ Jim Ferguson, SCEIS-BW

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#### Accomplishments:

- Human Resources:
    - ✓ HR Sub-Group cancelled Top 10 Report # 6 – Physical Location of Employee
    - ✓ HR Sub-Group approved Top 10 Report # 8 – Document Distribution Report's design
    - ✓ HR Sub-Group approved Top 10 Report # 10 – OSHA Report's design
    - ✓ HR Sub-Group placed on hold Top 10 Report # 12 – MSS Reports
  
  - Materials Management (Procurement & Inventory):
    - ✓ MM Sub-Group completed BEx Navigation and Existing MM reports Training
    - ✓ MM Sub-Group completed its "Top 10 Reports" List for Procurement
    - ✓ MM Sub-Group completed its "Top 10 Reports" List for Inventory
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Action Items:		
Responsible	Description	Due Date
<i>HR Sub-Group Action Items</i>		
Kelly Watkins	<i>Report # 2 – Monitoring of Tasks Report:</i> Distribute Robin Owen's example to the RUG HR Team.	Upon Receipt
HR Team	<i>Report # 2 – Monitoring of Tasks Report:</i> Review Robin Owen's example and prepare to discuss at the next RUG.	11/08/2011
Patricia Stephens	<i>Report # 4 – Labor Distribution Report:</i> Create a mock-up of this report and send it to Kelly Watkins for distribution to the RUG HR Team for review and feedback.	11/01/2011
Andy Shaw	<i>Report # 5 – Missing Time Report:</i> Set up a meeting with Girish Honne (SCEIS HR SME), Sammie Chumley (SCEIS HR SME), and Kelly Watkins (OHR SME) to discuss potential data crosswalks and report design feasibility with SCEIS HR SME.	11/08/2011
Kelly Watkins Andy Shaw	<i>Report # 7 – Employee (individual) History Report:</i> Kelly Watkins and Andy Shaw are researching existing queries that can be used as a model for creating this report. They will meet off-line and report back to the RUG on their finds next RUG.	11/08/2011
Lane Small Paige Stephens	<i>Report # 7 – Employee (individual) History Report:</i> Develop a mock-up of this report and for review and feedback at the next RUG.	11/08/2011
Andy Shaw	<i>Report # 8 – Document Distribution Report:</i> Provide a progress update at the next RUG meeting.	11/08/2011
Lane Small Paige Stephens	<i>Report # 10 – OSHA Report:</i> Complete production development of the approved POC and seek final approval from the HR RUG.	11/08/2011
Andy Shaw	<i>RH039A – Workforce Planning Date:</i> Research the feasibility and determine the LOE to add "Action Effective Date" to the existing report.	11/08/2011
Andy Shaw	<i>RH039X – Position Action Reason:</i> Research the feasibility and determine the LOE to add a new filter for "Valid from Date" to this existing.	11/08/2011
<i>MM Sub-Group Action Items</i>		
Pam Fambro	<i>Report # 1 – Inventory Turn Report:</i> Bring samples to next RUG and be prepared to demonstrate report to Inventory Team.	11/08/2011
Pam Fambro	<i>Report # 3 – Slow Moving Inventory Report:</i> Bring samples to next RUG and be prepared to demonstrate report to Inventory Team.	11/08/2011
Pam Fambro	<i>Report # 5 – Inventory Valuation Report:</i> Bring samples to next RUG and be prepared to demonstrate report to Inventory Team.	11/08/2011
Tim Russell	<i>Report # 6 - Material by Volume Report:</i> Bring samples to next RUG and be prepared to demonstrate report to Inventory Team.	11/08/2011
Pam Fambro	<i>Report # 9 – Scrap Report (WIP, Finished Goods, All):</i> Bring samples to next RUG and be prepared to demonstrate report to Inventory Team.	11/08/2011
Pam Fambro	<i>Report # 15 – Zero Inventory Report:</i> Bring samples to next RUG and be prepared to demonstrate report to Inventory Team.	11/08/2011
SCEIS MM Randy McElveen	Review requirements for potential new MRP report to determine: (1) need, (2) feasibility, and (3) priority.	11/08/2011

### Meeting Notes, Decisions, Issues:

#### Human Resources Sub-Group

- HR TOP 10 Reports:

1. *Report # 2 – Monitoring of Tasks Report:* Robin Owens sent an example of this report to Kelly Watkins for distribution to the HR Team. Next Step = HR Team to review before next RUG and then discuss it at next RUG.
2. *Report # 3 – LWOP Discrepancy Report:* Kelly Watkins reported no progress on this issue originally detailed at the August RUG concerning PA data being able to be updated when an employee was in LWOP status. Next Step = Continue research and report back to RUG as needed.
3. *Report # 4 – Labor Distribution Report:* Patricia Stephens originally intended to share a proto-type mock-up of this report but was unable to attend. The mock-up is in process and Patricia will share it with the group as soon as possible. The existing ECC report (ZHRLBRDISTR) that could be used as a template is too slow and times out, making it unusable. Next Step = Review report mock-up at the next RUG.
4. *Report # 6 – Physical Location of Employee:* The HR Team decided to cancel this report. Next Step = closed.
5. *Report # 7 – Employee (individual) History Report:* Kelly Watkins and Andy Shaw are researching existing queries that can be used as a model for creating this report. They will meet off-line and report back to the RUG on their finds next RUG. Lane Small and Paige Stephens volunteered to develop a mock-up of this report and review it at the next RUG. Next Step = Report findings and review mock-up at next RUG.
6. *Report # 8 – Document Distribution Report:* Andy Shaw shared a proto-type mock-up of this report with the HR team for review and feedback. The mock-up's input screen and overall report design were accepted by the team. The estimated time to develop the report is 20 hours. Andy will provide an update on his progress during the next RUG meeting. The team still needs to identify the acceptance criteria for this report and determine who will participate in its testing. The HR Team also needs to identify the ECC transaction, InfoType or report to validate the BW report against. Next Step = ID UAC and testing participants.
7. *Report # 10 – OSHA Report:* The team referenced the 300A report. Lane Small and Paige Stephens created a report mock-up and shared it with the HR team. The initial design was approved. Next Step = Lane & Paige complete development and seek final approval from the HR RUG.
8. *Report # 11 – Collision Report:* Currently, there exists an ECC report that is run every night by Sammie Chumley and then forwarded to Dee Travis. Dee then spends a significant amount of time manually manipulating the report before sending it out to agencies. End-users have asked for the ability to run this report for themselves. However, this is not possible since the ECC report is not a transaction. Moreover, research by the BW Team finds that this would require a significant LOE and redesign. Next Step = Decide if this report should be placed on hold or not while work is being completed on higher prioritized reports.
9. *Top 10 Report # 12 – MSS Reports:* The Management Self-Service report has been placed on hold till further notice. Next step = reevaluate at a later date TBD.

- Other / Existing Reports:

1. *RH039A – Workforce Planning Date:* The HR Team requested that "Action Effective Date" be added to this existing report. Andy Shaw is to research the feasibility and determine a LOE of the request and provide an update at the next RUG. Next Step = Change approval and prioritization by the HR Team.
2. *RH039G –* The HR Team decided that there was no need for further cross walking old position number on any reports like "Position Attribute" or "Employees with Selected Years State Service." This request was originally recorded under "Miscellaneous Enhancements" as "HRIS crosswalk position number." Next Step = closed.
3. *RH039X – Position Action Reason:* The HR Team requested that a new filter for "Valid from Date" be added to this report. Andy Shaw is to research the feasibility and LOE for this request and report back during the next RUG. Next Step = Change approval and prioritization by the HR Team.

- Business Objects Reports:

1. *"Dirty Data" Report:* Lane Small did a brief demonstration of a BOBJ report that will assist agencies in identifying "dirty data." The report was well received. However, since the report is a BOBJ report, agencies will have to have access to BOBJ before they can run it themselves. As an alternative, the report can be automatically run in batch and distributed monthly. Next Step = Approve Report and Determine report delivery method.

### Meeting Notes, Decisions, Issues:

#### Materials Management Sub-Group

1. Linda Branch reported that the action item to post the minority Report Documentation to the SCEIS website, under SCEIS Home » Reporting » Business Warehouse Reporting Publications – Materials Management had been completed.
2. Brandy Aull (SCEIS BW Team) and Kimber Craig (SCEIS MM Team) led the Mm Sub-group through BEx Navigation and Key MM Reports training (i.e. Current Contracts and Reports for Auditors).
3. The team then divided up into two groups, one to discuss procurement needs and the other to discuss inventory needs. The goal was to determine the reporting gaps and prioritize their development. Following are their respective finalized "Top 10 reports:"

#### Inventory

	<u>Priority</u>	<u>Comment</u>
1. Inventory Turn Report	Low	Will use existing BW Rpt
2. MRP Parameters Report	High	Assigned to Eddie Huddle
3. Slow Moving Inventory Report	Low	Will use existing BW Rpt
4. In-Transit Reports: (a) Location-to-Location, and (b) Plant-to-Plant	High	Assigned to Kathy Johnson
5. Inventory Valuation Report	Low	Will use MB52 & existing BW Rpt
6. Material by Volume Report	Low	Impacts S+D FG users only
7. Inventory Purchases Off Contract	n/a	Transferred to Procurement's List
8. BOM Report with Fully Loaded (detailed) \$	High	Assigned to Tim Russell
9. Scrap Report (WIP, Finished Goods, All)	Low	Will use MB51 & existing BW Rpt
10. A/R by Customer	High	Assigned to Kathy Johnson
11. Training Center Balance by Fund	Medium	Could use MB52 in the interim
12. Inventory Consumption by Cost Object	High	Assigned to Ashley Bishop
13. P&L Sales Commissions	High	Assigned to Kathy Johnson
14. Open Encumbrance for Inventory and Purchases (include Purchasing Group)	n/a	Transferred to Procurement's List
15. Zero Inventory Report	Low	
16. Plant Trail Balance by Fund with Internal Orders Detail	n/a	Transferred to FI

#### Procurement

	<u>Priority</u>	<u>Comment</u>
1. Shopping Cart with Expiring Funds/Grants	4	
2. PO/Contract Invoice Spend Report	1	Combine with Report #11
3. Framework (no funding) Orders List	8	
4. SRM: List of Shopping Cart (S/C) #, Bid Invoice #, Buyer and Workflow	7	Combine with Report #6 & #14
5. Approved S/C List with Missing Follow-on Docs by Purchasing Group	3	
6. Bid Invoice List Assigned to MMO/ITMO	7	Combine with Report #4 & #14
7. PO Cost Center Security (shows PO's assigned to CC not authorized for the listed Purchasing Group)	5	
8. Revisit Minority Reports	2	
9. "Value Added" (cost savings) to Statewide Procurement Process	6	
10. Revisit Current Contracts Reports to distinguish b/w Agency and Statewide	9	
11. PO's by State Contract (similar to #2)	1	Combine with Report # 2
12. SRM S/C Funding Availability Detail Report		Problem/Defect not report
13. Workflow by Purchasing Group		Will be difficult to create
14. S/C by Location, including Doc Type and Contract tied to S/C	7	Combine with Report #4 & #6
15. Add Purchasing Group to Open Encumbrance Report		Transferred from Inventory List
16. Inventory Purchase Off Contract		Transferred from Inventory List

4. Those working on inventory report designs were asked to call Sonia Young or Neil Hoare for inventory related questions, and Becky Ferguson or Neil Hoare for S+D related questions.

#### Next RUG Meeting:

Tuesday, November 8, 2011 - 9:00am – 12:00pm ET – Locations TBD