Enterprise Information Management

Reporting User Group Presentation
Tuesday March 15, 2016

admin
THE SOUTH CAROLINA
DEPARTMENT of ADMINISTRATION

January RUG Meeting Feedback Results

- Question Scores
- Handouts:
  - Finance Comments
  - Human Resources Comments

Question Responses

	Overall, this Meeting was Beneficial to me	Overall, this Meeting met my expectations	Please Rate your Interest in the Following:		
			Mini Reporting Workshops	Future RUG Meetings	Example Reports
Finance	5: 10/22 (45%) 4: 9/22 (41%) 3: 1/22 (5%) None: 2/22 (9%)	5: 11/22 (50%) 4: 8/22 (36%) 3: 1/22 (5%) None: 2/22 (9%)	5: 19/22 (86%) 4: 1/22 (5%) None: 2/22 (9%)	5: 17/22 (77%) 4: 3/22 (14%) None: 2/22 (9%)	5: 16/22 (73%) 4: 2/22 (9%) None: 4/22 (18%)
Human Resources	5: 4/17 (23%) 4: 10/17 (59%) 3: 1/17 (6%) None: 2/17 (12%)	5: 4/17 (23%) 4: 9/17 (53%) 3: 2/17 (12%) None: 2/17 (12%)	5: 13/17 (76%) 4: 2/17 (12%) None: 2/17 (12%)	5: 12/17 (70%) 4: 3/17 (18%) 3: 1/17 (6%) None: 1/17 (6%)	5: 13/17 (76%) 4: 2/17 (12%) None: 2/17 (12%)

SCEIS - Reporting Training Priorities 2016

- Wednesday, March 09, 2016

Q1: How important are these eight suggested Reporting topics for you or your staff? '1' is Most Important and '8' is Least Important. You may either drag the topics into the desired order, or select a rank number beside each one.
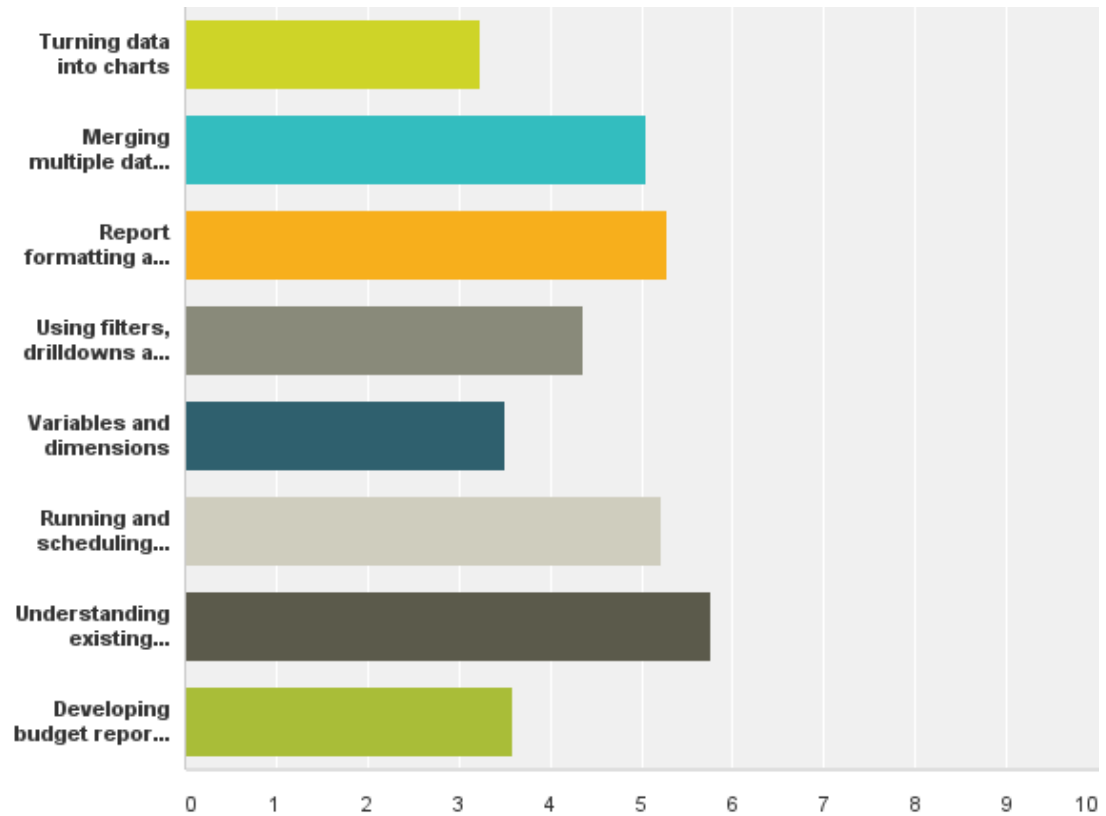
Q1: How important are these eight suggested Reporting topics for you or your staff? '1' is Most Important and '8' is

Least Important. You may either drag the topics into the desired order, or select a rank number beside each one •

• Answer

	1	2	3	4	5	6	7	8	Total	Score
Turning data into charts	0.00% 0	5.13% 2	12.82% 5	10.26% 4	12.82% 5	17.95% 7	12.82% 5	28.21% 11	39	3.23
Merging multiple data sources in one report and using BICS connections	23.08% 9	7.69% 3	15.38% 6	17.95% 7	7.69% 3	5.13% 2	15.38% 6	7.69% 3	39	5.05
Report formatting and customization	10.26% 4	12.82% 5	28.21% 11	17.95% 7	15.38% 6	7.69% 3	5.13% 2	2.56% 1	39	5.28
Using filters, drilldowns and other reporting tools	2.56% 1	12.82% 5	12.82% 5	12.82% 5	28.21% 11	15.38% 6	10.26% 4	5.13% 2	39	4.36
Variables and dimensions	0.00% 0	10.26% 4	7.69% 3	7.69% 3	12.82% 5	28.21% 11	25.64% 10	7.69% 3	39	3.51
Running and scheduling reports	20.51% 8	23.08% 9	7.69% 3	12.82% 5	5.13% 2	12.82% 5	7.69% 3	10.26% 4	39	5.21
Understanding existing reports and queries	35.90% 14	15.38% 6	7.69% 3	10.26% 4	7.69% 3	10.26% 4	10.26% 4	2.56% 1	39	5.77
Developing budget reports using projections	7.69% 3	12.82% 5	7.69% 3	10.26% 4	10.26% 4	2.56% 1	12.82% 5	35.90% 14	39	3.59

Q2: How likely are you or your staff to attend training on the same eight suggested topics? (Optional:) Use the text space at the end to suggest additional topics.

- Answered: 39 Skipped: 0

	Very likely	Somewhat likely	Maybe not	Definitely not	Total
Turning data into charts	33.33% 13	51.28% 20	7.69% 3	7.69% 3	39
Merging multiple data sources in one report and using BICS connections	74.36% 29	20.51% 8	5.13% 2	0.00% 0	39
Report formatting and customization	71.79% 28	20.51% 8	5.13% 2	2.56% 1	39
Using filters, drilldowns and other reporting tools	69.23% 27	28.21% 11	2.56% 1	0.00% 0	39
Variables and dimensions	46.15% 18	41.03% 16	7.69% 3	5.13% 2	39
Running and scheduling reports	74.36% 29	20.51% 8	5.13% 2	0.00% 0	39
Understanding existing reports and queries	74.36% 29	25.64% 10	0.00% 0	0.00% 0	39
Developing budget reports using projections	43.59% 17	25.64% 10	12.82% 5	17.95% 7	39

• Other topics you'd like to see:

❖ Merging financial data into HR reports (and vice versa) other than 1018; Developing dashboards; Incorporating legacy data into reports

❖ The possiblity of creating reports to output into multiple platforms (pdf, excel, word, access, etc...).

❖ Understanding the data options when trying to develop and run report

❖ Creating dashboards

❖ Payroll Reporting of turning data into useful reports

Report Development Process (Draft)

- User submits request to EIM for Report (Form)
- EIM staff contacts User to information about report
- EIM staff determines if existing report is available or if new report is needed
- EIM contacts central governing authority to confirm report needs/specs
- EIM staff develops report or customizes existing report to meet Users needs
- User tests report and provides feedback
- EIM trains user on refreshing and maintaining report
- Report is complete

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Standard Report Development Process (Draft)

- Central Authority and/or Reporting User Group identifies reports needed for User
- Central Authority and/or Reporting User Group submits request to EIM for Report (Form)
- EIM staff contacts User to information about report
- EIM staff determines if existing report is available or if new report is needed
- EIM contacts central governing authority to confirm report need/specs
- EIM staff develops report or customizes existing report to meet Users needs
- User tests report and provides feedback
- EIM trains user on refreshing and maintaining report
- Report is complete

Requests for Change and Report Specification Process

- Under development
- More support if needed by multiple agencies
- Need RUG help with Spec for Reports, examples of usage, needs and testing
- Need User Champion(s) for each area
- Need RUG to help support and develop the RFC
- Users help to make the Reports happen: Holds us accountable

Update on RFC's

(notes from Scott Houston)

Central Movements – BOBJ team has been testing the report and also testing the impact of the Central Movement code on other reports dependent on the ZPA-C01A cube which is used for the Central Movements report as well as many other reports. When the Central Movements report was first completed, it was found that there was an impact on the other reports using the same cube. The change has been made to correct that and each report needs to be tested.

Labor Distribution – Data has been loaded in BWQ system and the BOBJ team is testing their reports.

Time and Leave – We can find no specs on this report and don't have much to go on, so I approached the HR team about help with it. They tell me that Lane Small created 4 reports using EpiUse Query Manager in ECC and agencies have been using those. The only specs that the BW has to go on are the reports that have been created, so we need additional assistance from someone who knows the HR data. As soon as the labor distribution report is complete, the BW team will begin working with the HR team to build this report.

Update on RFC's

- Scott: Here is what I have on the other reporting RFC's:

- RFC-00280 – Track technical labor hours by employee   - Discussion was that PCM may help with this issue. Ed Pearce was going to discuss with John Taylor to see if this is still needed.

- RFC-00270 – Modify PO's by Contract for Spend Analysis – Brandy has been working with the MM team and is waiting on some responses from them as to whether they want the data from SRM rather than BW. BW is waiting on MM team to test.

- RFC-00260 – Monitoring of Tasks Report – BW has functional specs, but other reports have taken precedent over the work on this report

Update on RFC's and HR Report Data Status

- RFC-00254 – Add fields to current contracts BW report – The MM team has decided that they may want this data from SRM rather than BW. BW is waiting on their decision. Also waiting on PO by contract to be moved to production as part of RFC-00270.

- RFC-00205 – Add vendor info to Grant periodic expenditure report…. – BW team has started to look at this requirement. They are working with FI development team to determine whether the fields they think they need are the correct fields. There are 2 sets of field names that are very close and they are trying to determine which set to use. Work in progress.

- RFC-00137 – CO data universe for BW reporting – Waiting on the CO initiative at DEW. Ed was going to discuss with the FI team lead and consultant.

EIM Data Architecture Plan

- Meeting with DTO today to review
- Proof of Concept
- Determine scope of external data sources
- Currently: BW is the Data Source
- Future: BW is a Data Source
- Dynamic, flexible, quick, SCEIS & Non SCEIS, Relational
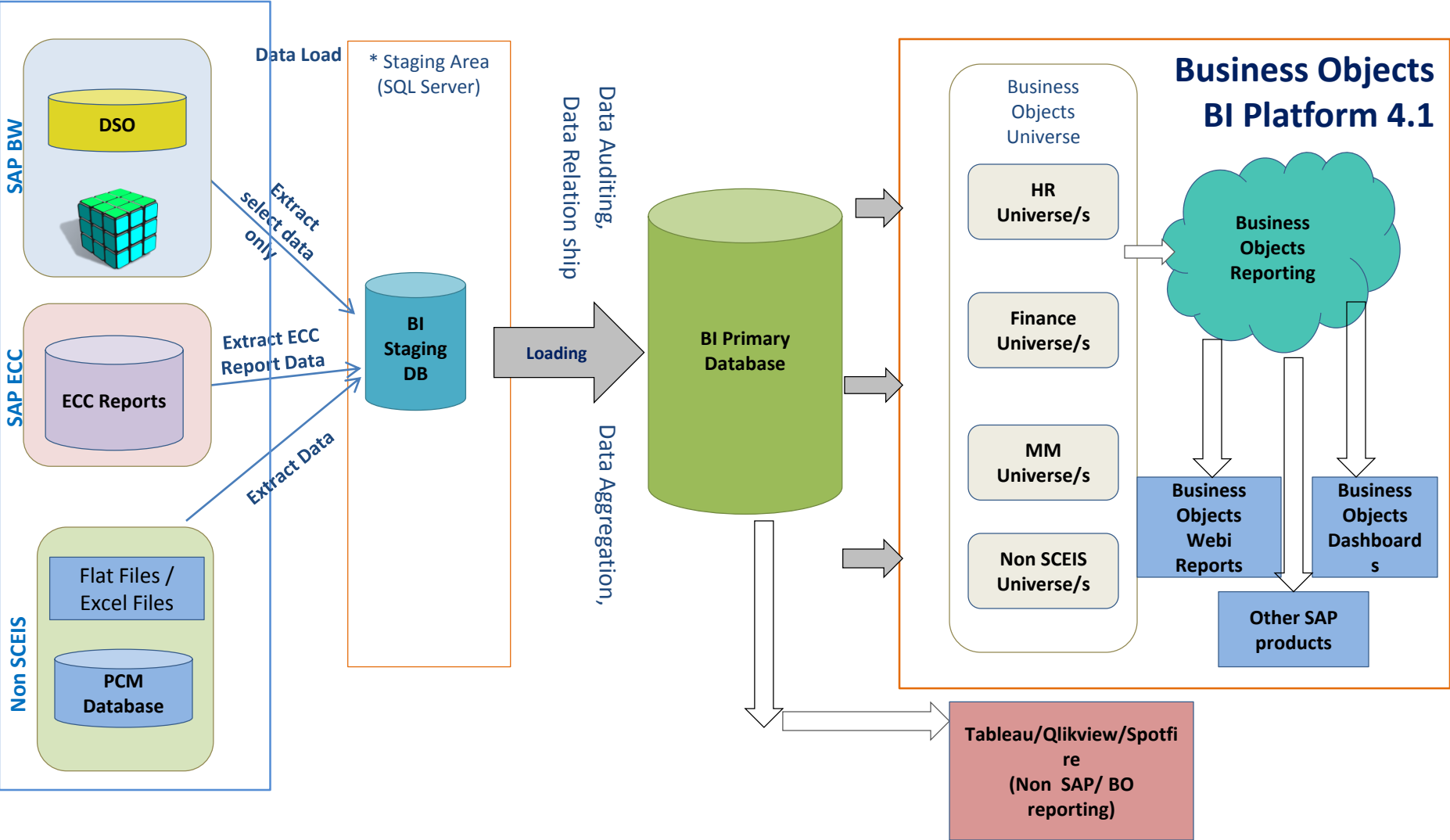- Invisible to Users

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Existing Reporting Architecture
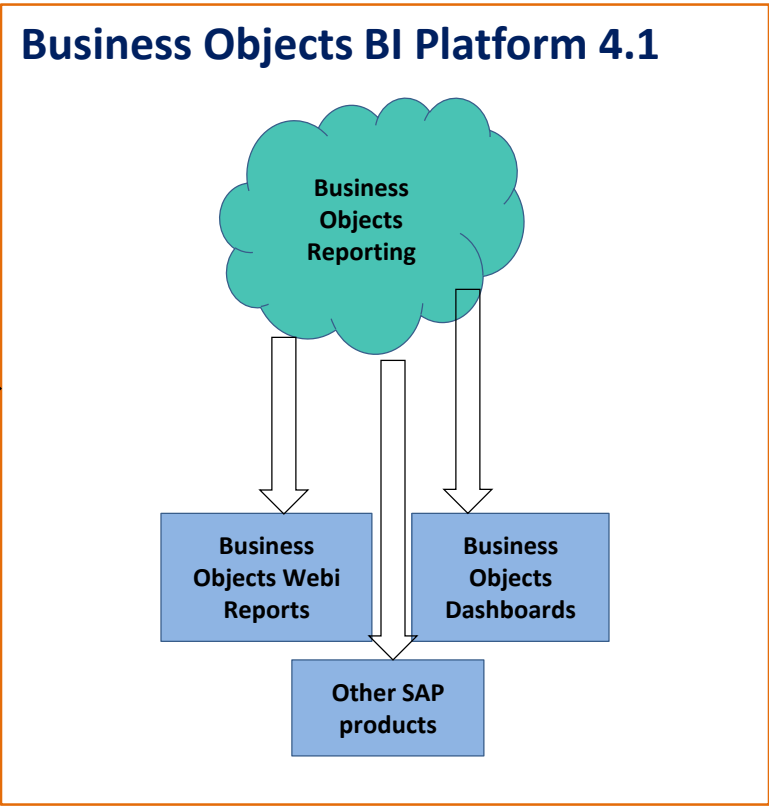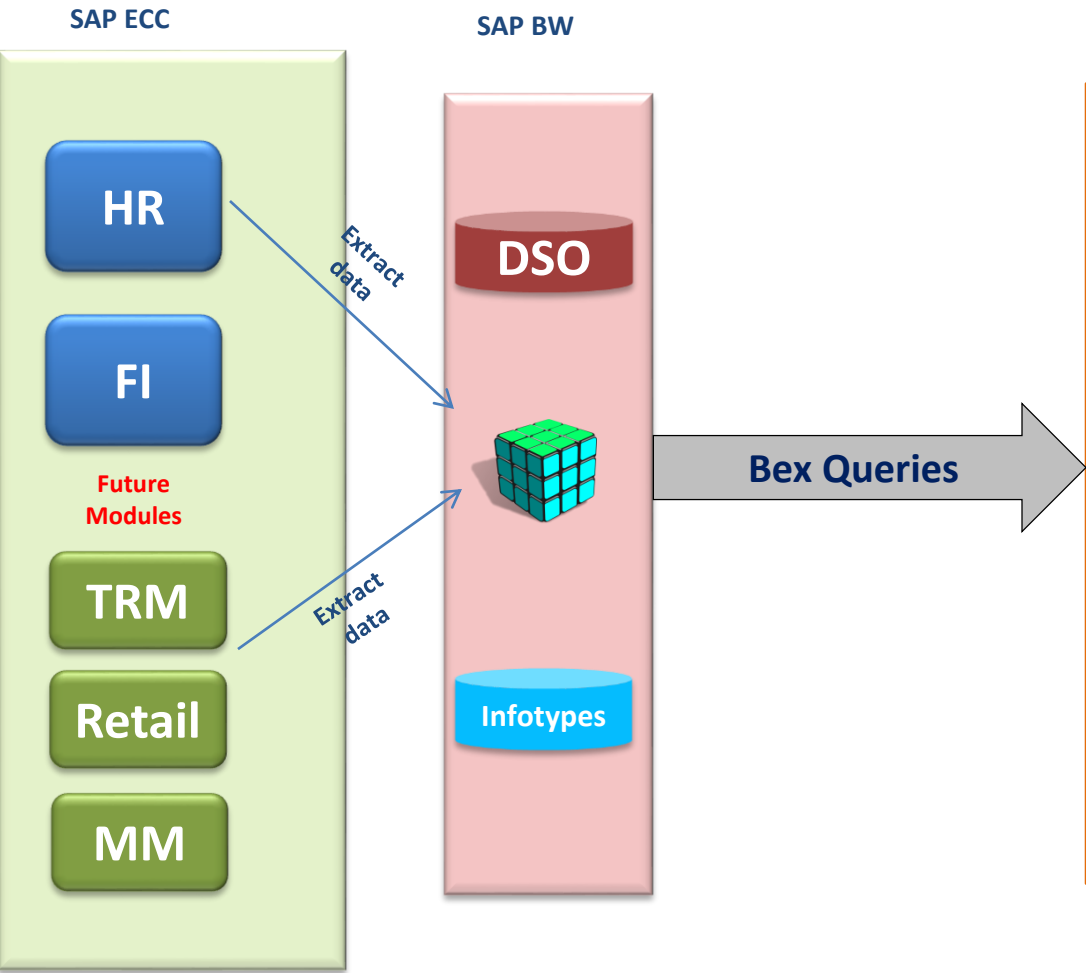
EIM Reporting Architecture

Only necessary data would be pulled from BW, if needed

EIM Search Tool Demo