

Enterprise Information Management

Reporting User Group Meeting
Thursday, January 21, 2016



Enterprise Information Management

- John Taylor, Director
- Cory Hare, FI Focus
- Eric Harvey, Programming Focus
- Kelly Hess, HR Focus
- Joseph Hnatko, Strategic Planning
- Abhilash Pulijala, Consultant

Meetings and Training

- **Tentative 2016 Meeting Schedule**

March

May

July

September

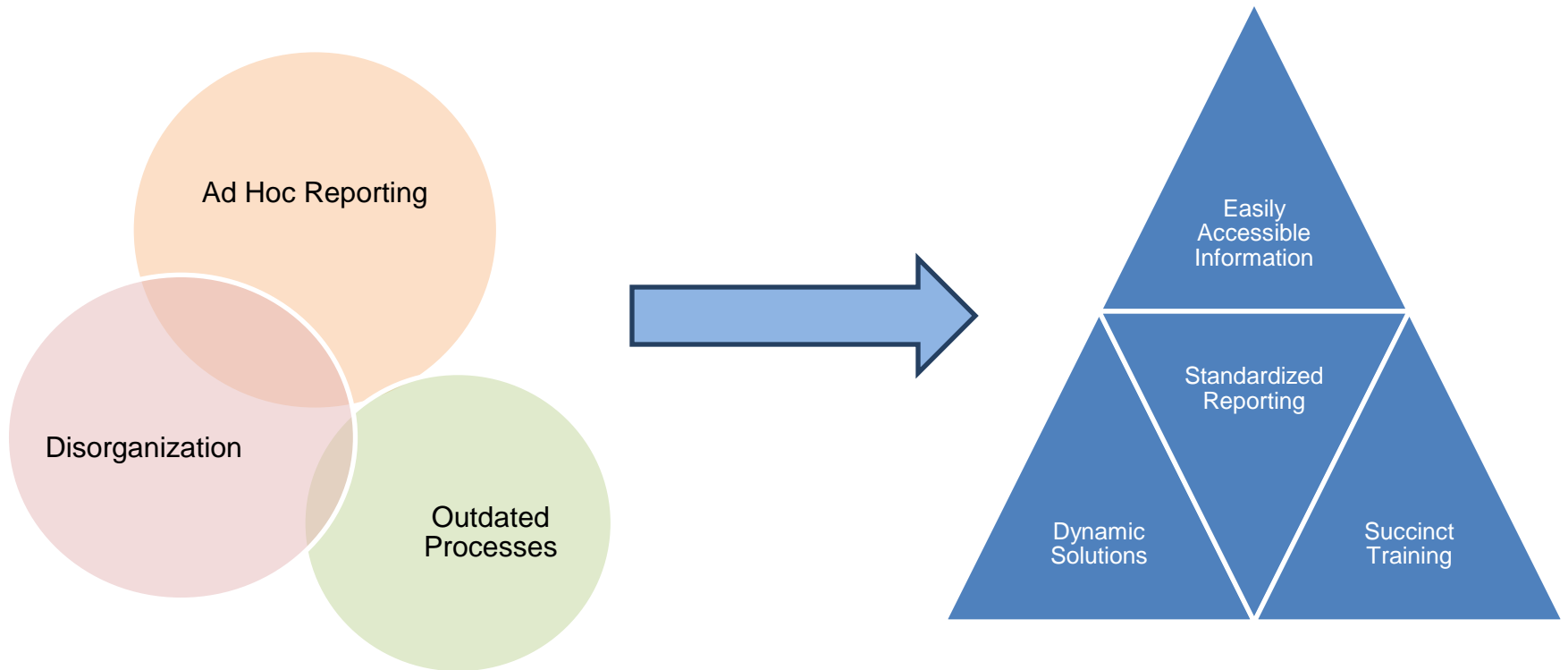
November

- **REP200**

HR/Payroll: February 18 OR March 19

FI/MM: March 10 OR May 5

Mission Statement



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Agency directors want a **standardized system of reporting and analysis** built around **easily accessible** information, **succinct training**, and **dynamic** solutions.

While the specific reports wanted are many and varied, the directors want more **projections, trend analysis**, and **visualization**. In addition, solutions should be more **user-friendly** in all aspects.

Currently, agencies often use **disorganized, ad-hoc** methods of reporting and data management involving redundant data transfer, low-tech solutions, and (in the words of one director) “lots of interns.” On the other end of the spectrum, at least one agency uses a programmer to create BusinessObjects reports. The extinguishment of these **outdated, expensive, and error-inducing processes** should be a focus of SCEIM.

Follow-up

- **Inventory of Existing Reports**
 - Searchable database
- **Training**
 - REP200U – online class
 - Mini reporting workshops
- **Better Follow-up**
 - Reporting specs form



Report Database



Enterprise Information Management Reporting Search

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Role	Report Name	Report Description	Report Link	Agency	Created By
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HR, Organisational Management	Vacancy	Details about the Vacancies as of yesterday from Bex Query Rh044	https://sceisreporting.sc.g...	D500-Department of Administration	Kelly Hess
HR, Personnel Administration	Retirees & Teri	Details about the Retiree and Teri's as of yesterday from Bex Query Rh040	https://sceisreporting.sc.g...	D500-Department of Administration	Cory Hare

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Reporting Specs Document

South Carolina



Department of Administration

EIM Report Charter



Enterprise Information Management

Technical Design

Table of Contents

- 1. Technical Requirements 1
- 2. Technical Resources 1
- 3. Business Data Sources (Example : HR-Payroll, MM-purchase order, FI-Account Payable).1
- 4. Data Tables 2
- 5. Derived Fields 2
- 6. Edit Masks 2
- 7. Filters 3
- 8. Sort 3
- 9. Report Layout 3
- 10. Charts 4
- 11. Notes 4



Enterprise Information Management

Reporting Requirements

1. Technical Requirements			
Requesting Entity			
Requestor Name			
Requestor Contact			
Report Name			
Report Purpose			
Report Frequency			
Document History			
Version	Date	Author	Reason for Change

2. Technical Resources	
A.	
B.	
C.	
D.	
E.	

3. Business Data Sources (Example : HR-Payroll, MM-purchase order, FI-Account Payable)	
A.	
B.	
C.	
D.	
E.	

New Products

- New SAP Reporting Tools
 - SAP Mobile
 - SAP Lumira
 - SAP Design Studio
 - SAP Analysis for Office
 - ETA – July 1st





Integrated Reporting

All in One Reports


- Budget
- Encumbrances
- Revenue
- Expenditures
- Cash Balances
- Grants
- Multiple Fiscal Years
- Scheduled
- Publications

Integrated Reporting


		Information Technology Services - General Funds	
		Fiscal Year 2018	
		As of December 31, 2016	
Non Personnel Appropriations			
Receipts			
	FY 15 -16 Revenues		-
	Total Receipts		-
Disbursements			
	Assets		
	Contractual Services *		
	Fixed Charges		
	Supplies & Materials		
	Travel & Training		
	Total Disbursements		
Commitments/Encumbrances			
	SKC COMMUNICATION PRODUCTS LLC		
	DATA NETWORK SOLUTIONS INC		
	TAPFIN		
	TEAM IA INC		
	HP INC		
	TIME WARNER CABLE BUSINESS CLASS		
	Total Commitments		
	Balance		

		Information Technology Services - General Funds	
		Fiscal Year 2018 Budget Report	
		As of December 31, 2016	
Expenditure Category			
Contractual Services			
	Data Processing Services *		
	Telephone - Desk Phones		
	Other		
	Telecom Services		
	General Repair		
	Other		
	Other Professional Services		
	Total		
Supplies & Materials			
	Communication Supplies		
	Data Processing Supplies		
	Office Supplies		
	Photo and Visual Supplies		
	Total		
Fixed Charges			
	Dues & Memberships		
	Total		
Travel & Training			
	Travel - Instate and Training		
	Travel - Out of State		
	Other		
	Total		
Other			
	Assets		
	Total		
	Grand Total		

Integrated Reporting

		Information Technology Services - General Funds	
		Fiscal Year 2016 Budget Report	
		As of December 31, 2015	
Expenditures by Vendor			
Contractual Services			
AT&T MOBILITY II LLC			
BANK OF AMERICA-P CARD			
BLUE RIDGE SECURITY SYSTEM			
DATA NETWORK SOLUTIONS INC			
DEPARTMENT OF ADMINISTRATION			
FIG LEAF SOFTWARE INC			
Not assigned			
SANS INSTITUTE			
SHI INTERNATIONAL CORP			
SKC COMMUNICATION PRODUCTS LLC			
SPIRIT COMMUNICATIONS			
TIME WARNER CABLE			
TIME WARNER CABLE BUSINESS CLASS			
TRAINING CONCEPTS			
VERIZON WIRELESS			
	Total	_____	_____
Supplies & Materials			
AT&T MOBILITY II LLC			
BANK OF AMERICA-P CARD			
DATA NETWORK SOLUTIONS INC			
SKC COMMUNICATION PRODUCTS LLC			
VERIZON WIRELESS			
	Total	_____	_____
Fixed Charges			
BANK OF AMERICA-P CARD			
	Total	_____	_____
Travel & Training			
	Total	_____	_____
Other			
DATA NETWORK SOLUTIONS INC			
	Total	_____	_____
Grand Total		_____	_____

* Pending Reimbursement from the colleges
Page 3 of 5

		Information Technology Services - General Funds	
		Fiscal Year 2016 Budget Report	
		As of December 31, 2015	
PO Break			
PO	Vendor		
45X	VERIZON WIRELESS		
45X	AT&T MOBILITY II LLC		
45X	SPIRIT COMMUNICATIONS		
46X	TRAINING CONCEPTS		
46X	DATA NETWORK SOLUTIONS INC		
46X	FIG LEAF SOFTWARE INC		
46X	SANS INSTITUTE		
46X	TIME WARNER CABLE		
46X	TIME WARNER CABLE BUSINESS CLASS		
46X	SKC COMMUNICATION PRODUCTS LLC		
46X	SHI INTERNATIONAL CORP		
		Total	_____

* Pending Reimbursement from the colleges
Page 3 of 5

Integrated Reporting

- 1 Report
 - YTD and MTD
 - Revenue
 - Budget
 - Encumbrances
 - FI Payments by Purchase Order
 - Summary and Detailed Information
 - Scheduled

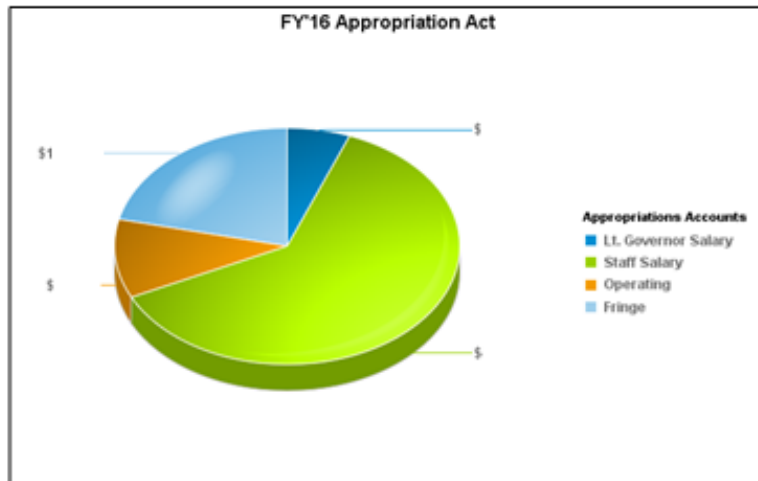
Integrated Reporting

- Purpose
 - Save time
 - Lower frustration levels
 - Lower risk of errors during data transfers
 - Provide detail and summary level information simultaneously
 - “Single version of the truth”
 - Build once and reuse

Report Level Modifications

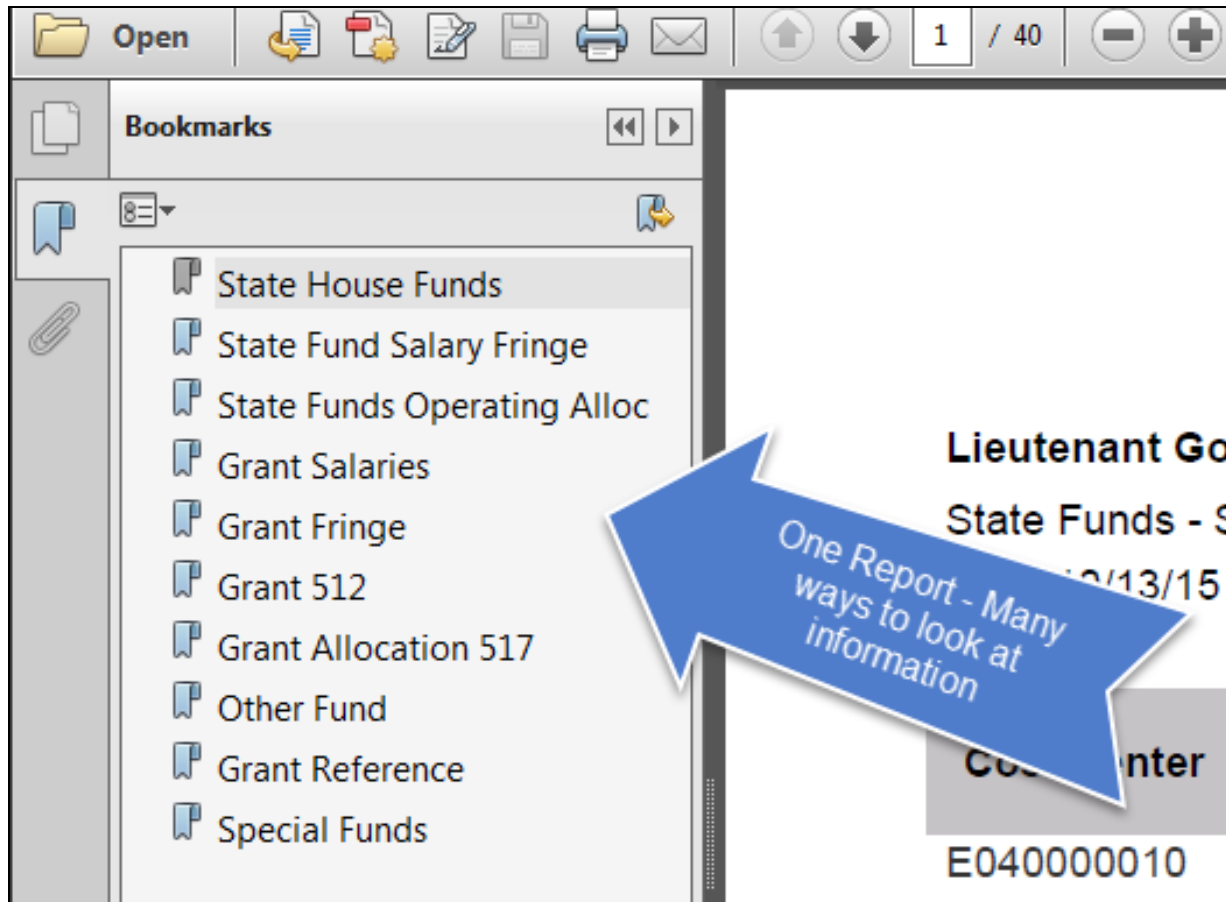
Lieutenant Governor's Office
 State Funds - State House Office Budget
 As of 10/13/15

Cost Center	Type of Expenditures	Available Amount	Expenditure	Projected Expenditure	Excess (shortage)	% Used YTD
	Lt. Governor's Salary					
	Staff Salary - Unclassified					
	Staff Salary - Other Personnel Svcs					
	Fringe					
	Operating					
Total:		_____	_____	_____	_____	_____



	Appropriation	YTD Expense	% Used
Lt. Governor Salary			
Staff Salary			
Operating			
Fringe			
Total:	_____	_____	_____

Report Level Modifications



Integrated Reporting

- 1 Report
 - Summary and Detailed Information
 - Expenditures and Projected Expenditures
 - Budget and Shortages/Excesses
 - Tables and Graphs
 - 1 Query
 - Scheduled

How Do We Get There?

- User input
- User direction
- User guidance
- User input
- User direction
- Understanding the report from the user's perspective
- Finding the data, and getting it in a report at the user's direction
- Working with the agency's staff to maintain and create other reports

User Input

SOUTH CAROLINA PORK BOARD
FISCAL YEAR 2015-2016
AS OF DECEMBER 31, 2015

		BUDGET	CURRENT EXPENSES	CURRENT BALANCE	ENCUMBERED	BALANCE
	501071	Temporary Positions				
	502148	Promotional				
	502153	Catered Meals				
	502154	Other Profess Services				
	503006	Data Processing Supplies				
	503303	Promotional Supplies				
	505000	Travel				
	513000	Employer Contributions				
Total P-1 Consumer Information (P160_0020)						
	502000	Contractual Services				
	502148	Promotional				
	502153	Catered Meals				
	502499	Other Contract Services				
	503303	Promotional Supplies				
	504102	Fees & Fines				
	505000	Travel				
Total P-2 Promotions (P160_0021)						
	502000	Contractual Services				
	502003	Print Bind Adv				
	502143	Non-St Employee Travel				

Agency Input

- 1 Report, 1 Refresh, Several Queries, Many...Many...Many Tabs

South Carolina Department of Agriculture
Fiscal Year: 2016
32900000 Soybean Board as of 12/31/15

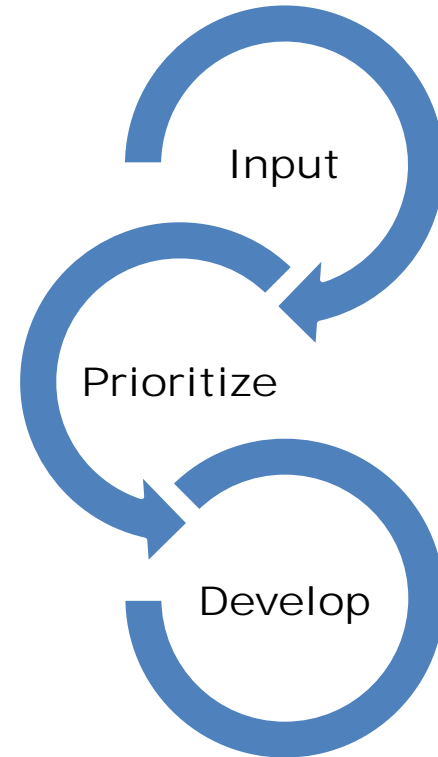
Funct Area	G/L	G/L Text	Budget	YTD Expense	Current Balance	Encumbered	Balance	Cash History	32900000
P160_0016	501072	PER DIEM	1,680.00	595.00	1,085.00	-	1,085.00	FY Beginning Cash Balance	1,062,608.41
	502153	CATERED MEALS	1,200.00	1,116.86	83.14	-	83.14	Assessments to Date	262,079.66
	505000	TRAVEL	5,000.00	-	5,000.00	-	5,000.00	Expended to Date	268,251.81
	505002	IN ST-LODGING	-	674.28	(674.28)	-	(674.28)	Ending Balance	1,056,436.28
	505004	IN ST-AUTO MILEAGE	-	1,875.80	(1,875.80)	-	(1,875.80)		
			-	-	-	-	-		
Subtotal Soybean Bd Member Re (P160_0016)			7,880.00	4,261.94	3,618.06	-	3,618.06		
P160_0017	502001	OFFICE EQUIP	200.00	-	200.00	-	200.00	PFY Beginning Cash Balance	1,044,088.04
	502003	PRINT BIND ADV	1,200.00	479.65	720.35	2,499.00	(1,778.65)	Assessments to Date	881,636.57
	502005	PHOTO & VISUAL SVCS	-	288.36	(288.36)	-	(288.36)	Expended to Date	-863,118.2
								Ending Balance	1,062,608.41

Beyond Reports

- Once the report is created, what can you do with it?
 - Break it up and distribute it (Publications)
 - Schedule it and distribute it
 - Enhance it

Feedback

- Questionnaire



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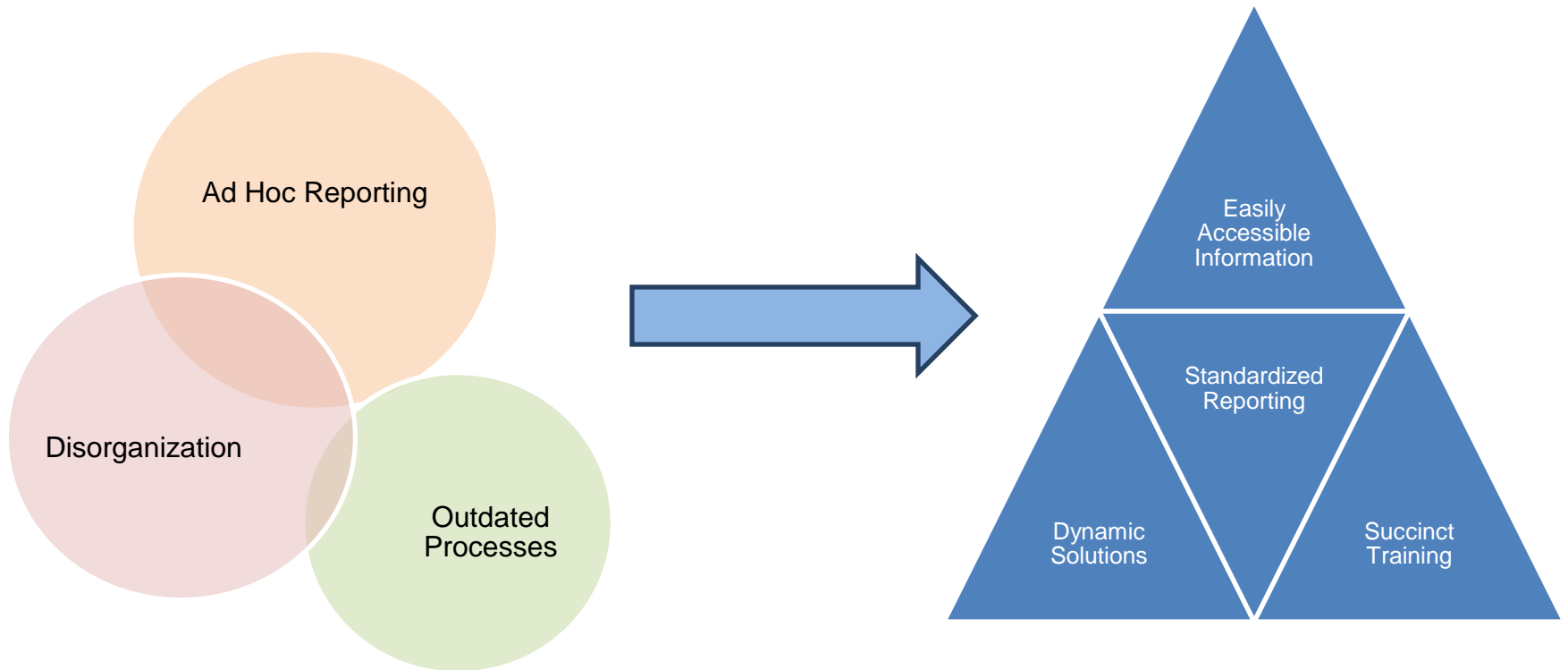
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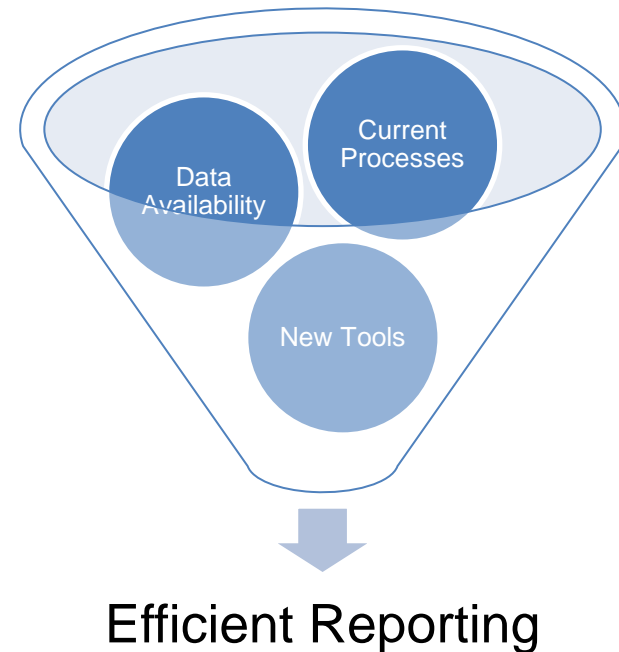
New Products

- New SAP Reporting Tools
 - SAP Mobile
 - SAP Lumira
 - SAP Design Studio
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 - ETA – July 1st



Human Resources

- **Renewed Focus**
 - Labor Distribution
 - Time Data
 - Central Movement Actions
- **User Input**
- **Handout**
- **Questionnaire**



Human Resources – Employee Overview

Employee History

Employee		State Hire Date	8/22/83	Last Review Date	5/17/12
Employee Key		Agency Hire Date	6/2/15	Performance Review Date	5/17/13
Current Annual Salary		Universal Review Date		Last EPMS Rating	EXCEPTIONAL

Current Information

Job	Position	Org Unit	Minimum Salary	Mid Point Salary	Maximum Salary	Annual Salary
		ADMINISTRATION/FINANCE	\$0.00	\$0.00	\$0.00	

Funding Information

Fund	Functional Area	Grant	Cost Center	State funded Program	Percentage
30350000	OPERATING REVENUE				25.00%
34170000	SPECIAL OPERATING				5.00%
50550000	FEDERAL				70.00%

Salary History

Salary Begin Date	Action Reason	Action Type	Effective Date	Minimum Salary	Mid Point Salary	Maximum Salary	Annual Salary	% Increase		
6/2/14	Z4/01	OHR-Agency to Agency Transfer	Z4	Movement Between Agencies (SC)	6/2/15	\$38,703.00	\$55,155.00	\$71,608.00		100.00%
6/2/14	ZI/08	Reclassification Lateral	ZI	Reclass/Realloc (SC)	7/2/15	\$0.00	\$0.00	\$0.00		0.00%

Human Resources – Employee Overview

- All-in-1 reports
 - Combine information from different areas (actions, current job information, salary history, EPMS data, bonus payments) into one report by employee
 - Customize the information to be displayed the way you and your agency views the information
 - Can be placed in your favorites or a shared folder to be accessed by others at any time on any day

Human Resources

- Purpose
 - Save time
 - Lower frustration levels
 - Lower risk of errors during data transfers
 - Provide detail and summary level information simultaneously
 - “Single version of the truth”
 - Build once and reuse

Human Resources – Report Level Customizations


Workforce Composition by SHAC Categories

	WM	WF	BM	BF	OM	OF	Total Emps by Category	Category Pct of Workforce
C9 OTHER (NON-ACADEMIC)	6	2	2	2	-	-	12	1.52%
E1 EXECUTIVES	42	25	3	15	1	1	87	11.03%
E2 PROFESSIONALS	132	147	21	101	3	10	414	52.47%
E3 TECHNICIANS	28	9	12	17	3	-	69	8.75%
E5 PARAPROFESSIONALS	1	27	2	13	-	2	45	5.70%
E6 SECRETARIAL/CLERICAL	8	11	9	18	1	1	48	6.08%
E7 SKILLED CRAFT	47	2	17	1	-	-	67	8.49%
E8 SERVICE MAINTENANCE	22	3	13	9	-	-	47	5.96%
EEO Totals	286	226	79	176	8	14	789	
EEO Pct	36.25%	28.64%	10.01%	22.31%	1.01%	1.77%		


Human Resources – Report Level Customizations

- Take the information and display it the way you need to see it
 - Workforce information by SHAC categories
 - Or by Job Class
 - Or by Age range
 - Or by education
 - Or by.....
 - Employee counts and percentages
 - Comparisons across org units, positions, etc..

Human Resources – Pay Actions

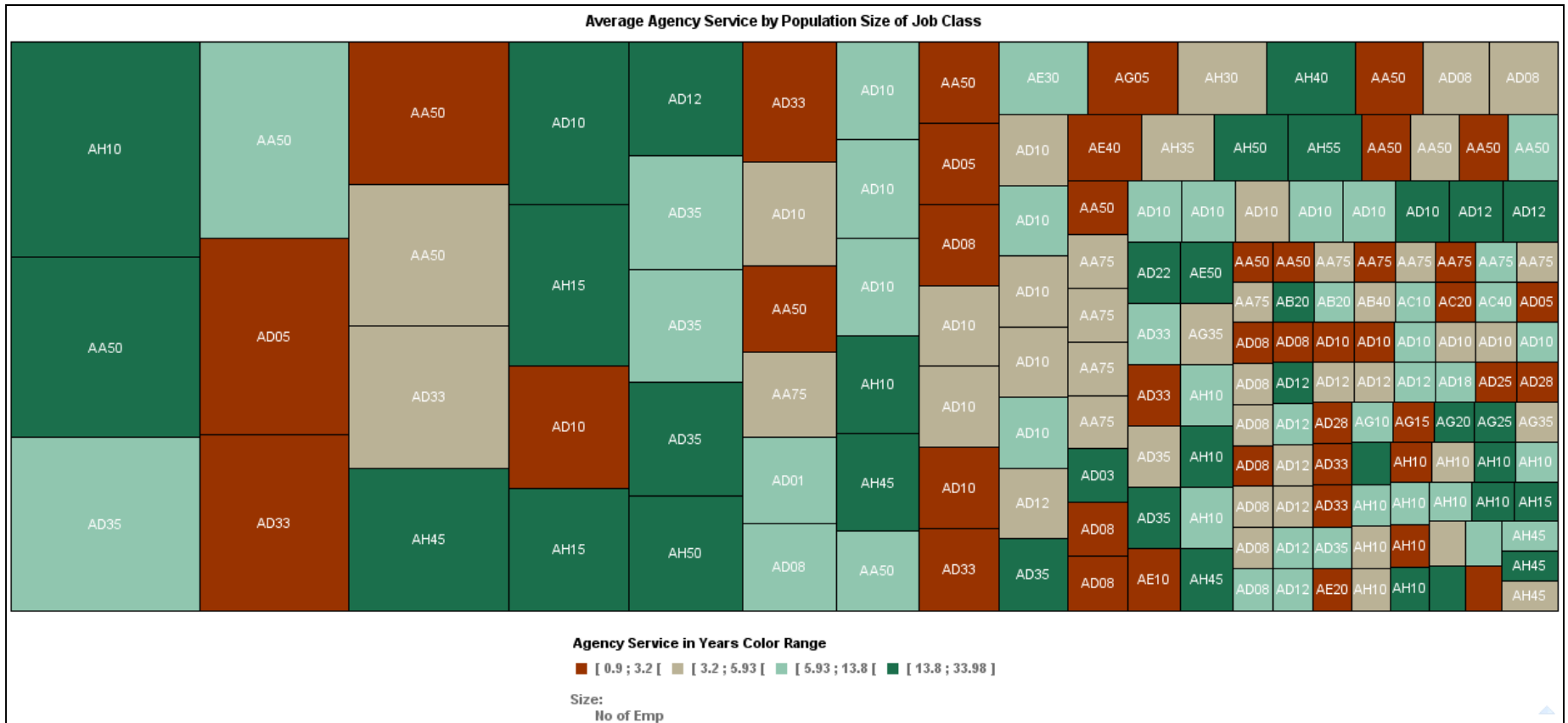
 MTD Personnel and Pay Actions Summary <small>THE SOUTH CAROLINA DEPARTMENT of ADMINISTRATION</small> Refreshed on: 1/19/16											
January New Hires		Division	Program Area	Pos No	Class	Position Title	Annual Salary	State	Fed	Other	
Movement Between Agencies		General Counsel								100	
New Hire		Division of General Services								100	
Movement Between Agencies		Division of State Human Resources						100			
Movement Between Agencies		Division of Technology								100	
New Hire		Division of Technology						100			
Movement Between Agencies		Office of Exec Policy & Prgms								100	
				Total	6						
January Separations		Division	Program Area	Pos No	Class	Position Title	Annual Salary	State	Fed	Other	
Employed Outside State Gov		Division of General Services								100	
Retirement		Office of Exec Policy & Prgms						50	50		
Personal		Office of Exec Policy & Prgms								100	
				Total	3						
January Retirements		Division	Program Area	Pos No	Class	Position Title	Annual Salary	State	Fed	Other	
Retirement		Office of Exec Policy & Prgms						50		50	
				Total	1						
January Pay Actions*		Pay Action Reason	Division	Program Area	Pos No	Class	Position Title	Salary % +/-	State	Fed	Other
Promotion		FTE Promotion									100
Promotion		FTE Promotion							100		
Reclass/Realloc		Reclassification Upward							50		50
Reclass/Realloc		Reclassification Upward							50		50
Salary Adjustment		Performance									100
					Total	5					

Human Resources – Pay Actions

 THE SOUTH CAROLINA DEPARTMENT of ADMINISTRATION		January Pay Actions Refreshed on: 1/19/16				
Action Effective Date	Action Type	Action Reason	Employee Group	Pos No	Class Code	Positi
1/2/16	Movement Between Agencies	FTE - Lateral Transfer	UNCLASSIFIED FTE			
1/2/16	Movement Between Agencies	FTE - Promotion	CLASSIFIED FTE			
1/2/16	Promotion	FTE Promotion	CLASSIFIED FTE			
1/2/16	Reclass/Realloc	Reclassification Upward	CLASSIFIED FTE			
1/2/16	Reclass/Realloc	Reclassification Upward	CLASSIFIED FTE			
1/2/16	Salary Adjustment	Performance	CLASSIFIED FTE			
1/4/16	Movement Between Agencies	FTE - Promotion	CLASSIFIED FTE			
1/4/16	Movement Between Agencies	Time Limited Appointment	TIME LIMITED			
1/4/16	Promotion	FTE Promotion	CLASSIFIED FTE			

Summary Action	No of Trans		BM	WM	BF	WF
Movement Between Agencies	4	Movement Between Agencies	1	2		1
Promotion	2	Promotion		1		1
Reclass/Realloc	2	Reclass/Realloc		1	1	
Salary Adjustment	1	Salary Adjustment	1			
Total Trans	9	Total Trans	2	4	1	2

Human Resources - Visualization



Human Resources - Visualization

- Report shows population of job class relative to overall size of agency and then the color denotes average agency service for that job class
- Red is agency service between 0 to 3.2 years and dark green is 13.8 years or more
- Purpose
 - Job class retention
 - Easily see agency job class make up by relative population size
 - See where your turnover is occurring

How Do We Get There?

- User input
- User direction
- User guidance
- User input
- User direction
- Understanding the report from the user's perspective
- Finding the data, and getting it in a report at the user's direction
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