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
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 The extinguishment of these outdated, expensive, and error-inducing processes should be a focus of SCEIM.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

This is a wildcard search engine for the reports. Enter partial report name or description to get to the report.

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<thead>
<tr>
<th>Role</th>
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<th>Report Description</th>
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<th>Agency</th>
<th>Created By</th>
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<tr>
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<td>Details about the Budget and Actual as of yesterday from Bex Query Rh099</td>
<td><a href="https://sceisreporting.sc.g">https://sceisreporting.sc.g</a>...</td>
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Search: ds

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<td>D500-Department of Administration</td>
<td>Cory Here</td>
</tr>
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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 2016**

**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**

*Pending Reimbursement from the Colleges*

---

### Information Technology Services - General Funds

**Fiscal Year 2016 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
  - **Grand Total**

*Pending Reimbursement from the Colleges*
Integrated Reporting
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
Lieutenant Governor's Office
State Funds - State House Office Budget
As of 10/13/15

<table>
<thead>
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<th>Cost Center</th>
<th>Type of Expenditures</th>
<th>Available Amount</th>
<th>Expenditure</th>
<th>Projected Expenditure</th>
<th>Excess (shortage)</th>
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<tr>
<td>Lt. Governor's Salary</td>
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<tr>
<td>Staff Salary - Unclassified</td>
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<tr>
<td>Staff Salary - Other Personnel Svcs</td>
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<tr>
<td>Fringe</td>
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<td>Operating</td>
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<tr>
<td><strong>Total:</strong></td>
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FY'16 Appropriation Act

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<th>Appropriation Accounts</th>
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<tr>
<td>Lt. Governor Salary</td>
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<tr>
<td>Staff Salary</td>
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<tr>
<td><strong>Total:</strong></td>
<td>$</td>
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</table>
Report Level Modifications

One Report - Many ways to look at information
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
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Budget</th>
<th>Current Expenses</th>
<th>Current Balance</th>
<th>Encumbered</th>
<th>Balance</th>
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<tr>
<td>502154</td>
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<tr>
<td>505000</td>
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<tr>
<td>513000</td>
<td>Employer Contributions</td>
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**Total P-1 Consumer Information (P160_0020)**

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<th>Budget</th>
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<td>502153</td>
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**Total P-2 Promotions (P160_0021)**

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<td>Non-St Employee Travel</td>
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</table>
Agency Input

- 1 Report, 1 Refresh, Several Queries, Many...Many...Many Tabs
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
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
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  July
  September
  November

• **REP200**
  HR/Payroll: February 18 OR March 19
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Mission Statement

- Easily Accessible Information
- Standardized Reporting
- Dynamic Solutions
- Succinct Training

Ad Hoc Reporting
Disorganization
Outdated Processes
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.

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Search
d5

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2. Technical Resources ...................................................................................... 1
3. Business Data Sources (Example: HR-Payroll, MI-Purchase Order, PI-Account Payable) .................................................. 1
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5. Data Fields .................................................................................................. 1
6. File Mask .................................................................................................... 1
7. File ............................................................................................................. 1
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9. Report Layout .............................................................................................. 1
10. ORDS ........................................................................................................ 1
11. Notes ........................................................................................................ 4

1. Technical Requirements

Requesting Entity

Requested Name

Requested Contact

Report Name

Report Frequency

Approved Date

Author

Reason for Change

2. Technical Resources

3. Business Data Sources

[Table continues with detailed entries for data sources and related technical information]
New Products

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

- **Renewed Focus**
  - Labor Distribution
  - Time Data
  - Central Movement Actions

- **User Input**
- **Handout**
- **Questionnaire**

Efficient Reporting

- **Data Availability**
- **Current Processes**
- **New Tools**
# Employee History

**Employee:** [Redacted]
- **Employee Key:** [Redacted]
- **Current Annual Salary:** [Redacted]
- **State Hire Date:** 8/22/83
- **Agency Hire Date:** 6/2/15
- **Last Review Date:** 5/17/12
- **Performance Review Date:** 5/17/13
- **Universal Review Date:** 5/17/13
- **Last EPIMS Rating:** EXCEPTIONAL

## Current Information

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## Salary History

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<th>Maximum Salary</th>
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<th>% Increase</th>
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<td>DHR-Agency to Agency Transfer</td>
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• 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
• 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

<table>
<thead>
<tr>
<th>Category</th>
<th>WM</th>
<th>WF</th>
<th>BM</th>
<th>BF</th>
<th>OM</th>
<th>OF</th>
<th>Total Emps by Category</th>
<th>Category Pct of Workforce</th>
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<td>C9</td>
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<td>6</td>
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<td>E1</td>
<td>EXECUTIVES</td>
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<td>PROFESSIONALS</td>
<td>132</td>
<td>147</td>
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<tr>
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<td>SECRETARIAL/CLERICAL</td>
<td>8</td>
<td>11</td>
<td>9</td>
<td>18</td>
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<td>E7</td>
<td>SKILLED CRAFT</td>
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<td>SERVICE MAINTENANCE</td>
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<td>36.25%</td>
<td>28.64%</td>
<td>10.01%</td>
<td>22.31%</td>
<td>1.01%</td>
<td>1.77%</td>
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</table>
Human Resources – Report Level Customizations

• Take the information and display it the way you need to see it
  – Workforce information by SHAC categories
    o Or by Job Class
    o Or by Age range
    o Or by education
    o Or by……..
  – Employee counts and percentages
  – Comparisons across org units, positions, etc..
### MTD Personnel and Pay Actions Summary

**January New Hires**

<table>
<thead>
<tr>
<th>Division</th>
<th>Program Area</th>
<th>Pos No</th>
<th>Class</th>
<th>Position Title</th>
<th>Annual Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movement Between Agencies</td>
<td>General Counsel</td>
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<td>New Hire</td>
<td>Division of General Services</td>
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<td>Movement Between Agencies</td>
<td>Division of State Human Resources</td>
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<tr>
<td>Movement Between Agencies</td>
<td>Division of Technology</td>
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<tr>
<td>New Hire</td>
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<td>Movement Between Agencies</td>
<td>Office of Exec Policy &amp; Progs</td>
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<td></td>
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<tr>
<td><strong>Total</strong></td>
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**January Separations**

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<th>Program Area</th>
<th>Pos No</th>
<th>Class</th>
<th>Position Title</th>
<th>Annual Salary</th>
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<tbody>
<tr>
<td>Employed Outside State Gov</td>
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<td>Office of Exec Policy &amp; Progs</td>
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<td>Personal</td>
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**January Retirements**

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<th>Program Area</th>
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<th>Class</th>
<th>Position Title</th>
<th>Annual Salary</th>
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</thead>
<tbody>
<tr>
<td>Retirement</td>
<td>Office of Exec Policy &amp; Progs</td>
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<td><strong>Total</strong></td>
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**January Pay Actions**

<table>
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<tr>
<th>Pay Action Reason</th>
<th>Division</th>
<th>Program Area</th>
<th>Pos No</th>
<th>Class</th>
<th>Position Title</th>
<th>Salary % +/-</th>
<th>Annual Salary</th>
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<tbody>
<tr>
<td>Promotion</td>
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<td>Promotion</td>
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<tr>
<td>Reclass/Realloc</td>
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<td>Reclass/Realloc</td>
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<tr>
<td>Salary Adjustment</td>
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<td></td>
<td></td>
<td>Performance</td>
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### January Pay Actions

**Refreshed on: 1/19/16**

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<tr>
<th>Action Effective Date</th>
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<th>Action Reason</th>
<th>Employee Group</th>
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<tbody>
<tr>
<td>1/2/16</td>
<td>Movement Between Agencies</td>
<td>FTE - Lateral Transfer</td>
<td>UNCLASSIFIED FTE</td>
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<td>1/2/16</td>
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<td>FTE - Promotion</td>
<td>CLASSIFIED FTE</td>
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<td>FTE Promotion</td>
<td>CLASSIFIED FTE</td>
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<tr>
<td>1/2/16</td>
<td>Reclass/Realloc</td>
<td>Reclassification Upward</td>
<td>CLASSIFIED FTE</td>
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<tr>
<td>1/2/16</td>
<td>Reclass/Realloc</td>
<td>Reclassification Upward</td>
<td>CLASSIFIED FTE</td>
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<td>1/2/16</td>
<td>Salary Adjustment</td>
<td>Performance</td>
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<td>1/4/16</td>
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<td>FTE - Promotion</td>
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<tr>
<td>1/4/16</td>
<td>Movement Between Agencies</td>
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<td>1/4/16</td>
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<td>FTE Promotion</td>
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#### Summary Action

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<tr>
<th>Summary Action</th>
<th>No of Trans</th>
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<th>WM</th>
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<tr>
<td>Reclass/Realloc</td>
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<td>1</td>
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<td>1</td>
<td>1</td>
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<td>Salary Adjustment</td>
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<td><strong>Total Trans</strong></td>
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</table>

#### Movement Between Agencies

- Promotion: 1
- Reclass/Realloc: 1
- Salary Adjustment: 1

**Total Trans:** 2 4 1 2
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
• Working with the agency’s staff to maintain and create other reports
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