AGENCY SUPPORT TEAM LEADS MEETING

Thursday, August 20, 2009

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Agenda

- Welcome, Purpose and Outcomes
- Citrix Installation / Technical Readiness
- Cost Center Security
- Conversion and Interface Q & A
- Role Mapping Update
- Employee Readiness
- Training Registration

Meeting Purpose and Outcomes

- Purpose: To provide information related to current priorities for implementation preparation.

- Outcomes
  1. Determine technical readiness and next steps
  2. Familiarity with Cost Center security issues that need to be addressed
  3. Understanding of employee readiness activities and training registration process

South Carolina Enterprise Information System

Agency Support Team Leads Meeting

CITRIX INSTALLATION / TECHNICAL READINESS

RICHARD WICKER, DEPLOYMENT LEAD

STATE INFORMATION TECHNOLOGY

SC BUDGET AND CONTROL BOARD

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Citrix – User Access

- All users will, at a minimum, need internet access
- Employees using ESS/MSS (MySCEmployee) will connect via Portal
- Supplier Relationship Management (SRM) users will be accessed via the SRM web application
- Staff in finance, budget, grants, payroll, procurement and human resources will access many related SCEIS modules through the web access to Citrix
- Employees using the SCEIS reporting and imaging applications will do so through web access to Citrix

Citrix Installation and Testing

- Citrix installation should be completed by Sept 15
- Installation information available for self-installation
- On-site agency assistance is available; if needed contact your Agency Advocate
- Citrix testing needs to be conducted by Sept 15

Technical Readiness Documentation

- Internet Explorer supported versions
  - Internet Explorer 6 & 7 (version 8 not yet supported by SAP)
- Organizational Technical Infrastructure Readiness Guide
  - Outlines responsibilities, activities and requirements for successful connectivity to SCEIS production
- Citrix Install Guide
  - Provides guidance for: IE browser settings to support Citrix; Installation of Citrix; one time network time-test of internet connectivity
- Citrix ica32web.msi (installation download)
- http://www.sceis.sc.gov (click on Technical on the left navigation bar)

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COST CENTER SECURITY

Bruce Burnette and Kevin Lewis, Finance Team

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Topics

- Overview
- Approach and Design
- Examples of Authorization Levels
- Role Mapping Impact

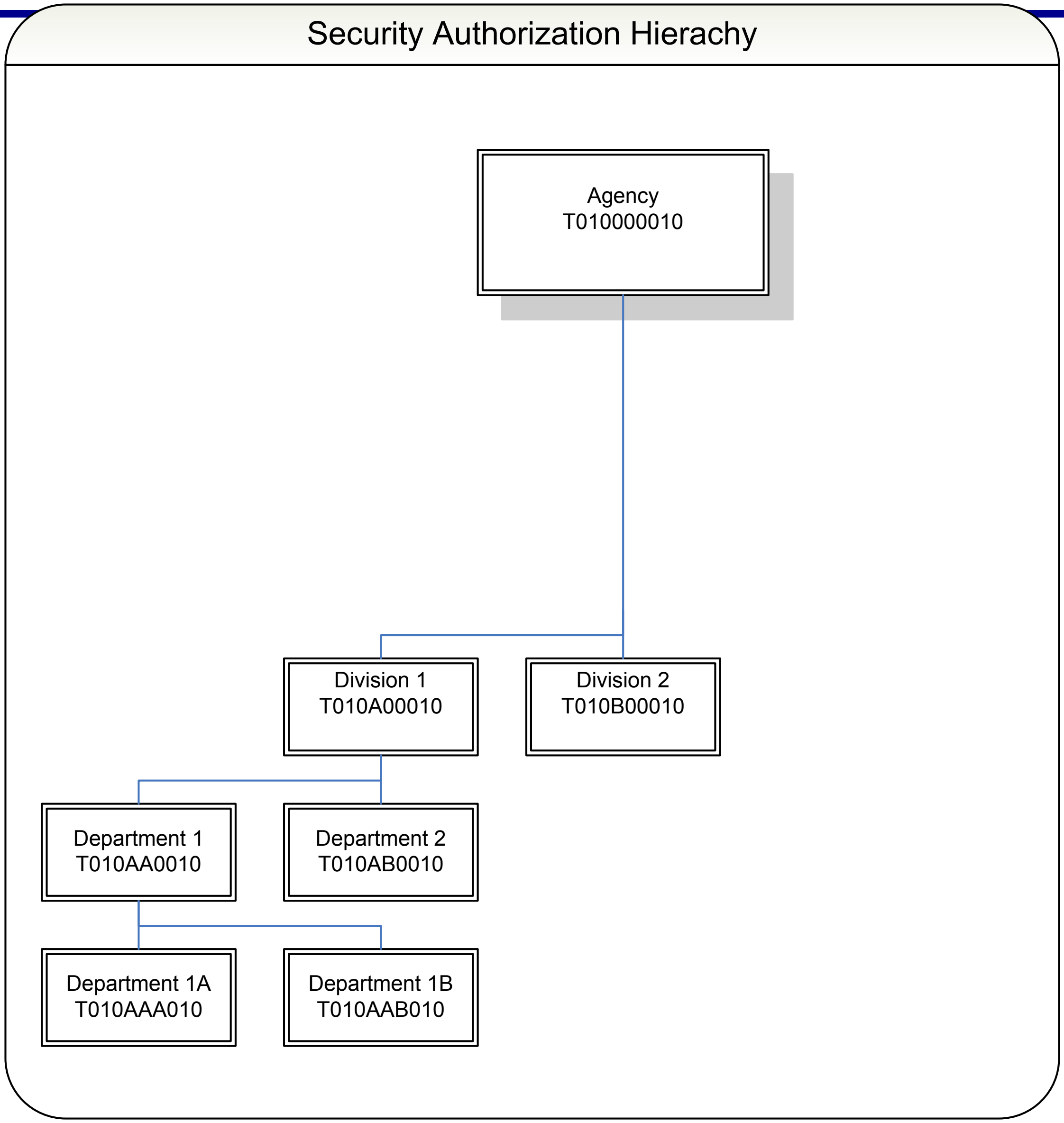
SAP Authorization Overview

- Authorizations are the key building blocks of SAP security.
- Authorization is the process of assigning values to fields present in authorization objects.
- In SAP, access to all system functionality is achieved through a complex array of authorizations.
- When users lack the necessary authorizations to perform a function in the system, results in the error message: "You are not authorized..."

SCEIS Approach

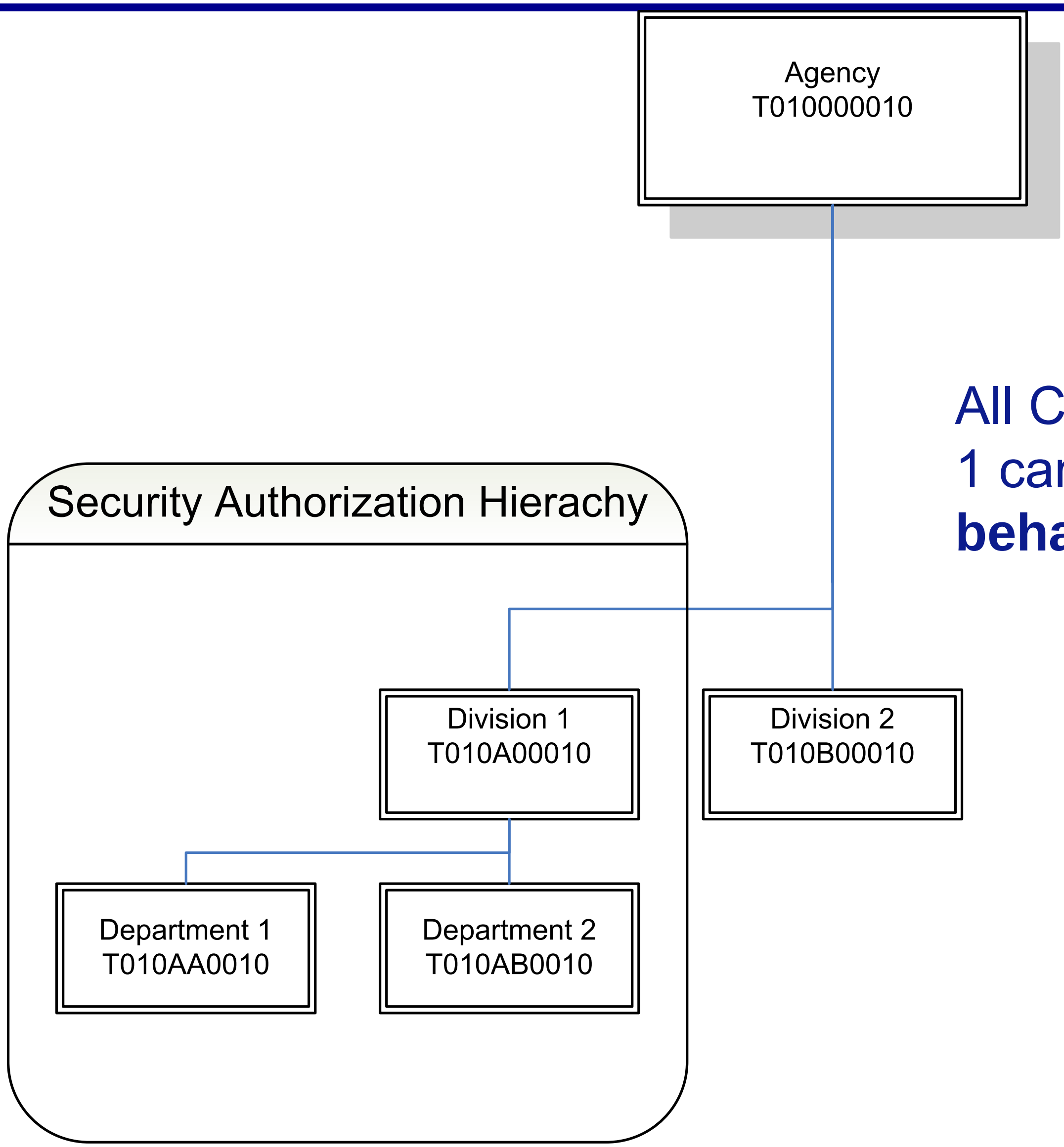
- Due to the size and nature of the Phase 3 & 4 agencies businesses, SCEIS acknowledged that limiting security by cost/fund center would be necessary for November, 2009 go-live.
- Agencies can choose to use the lower level authorization (5th or 6th char) but can leave it at the agency level (4th char).
- Focus for the November, 2009 go-live is to secure entry and update transactions.
- Display Transactions will be secured at an Agency level.

Example 4th Position



All Cost Centers within an Agency can post transactions on behalf of each other

Example 5th Position



All Cost Centers in Division 1 can post transactions on **behalf of each** other

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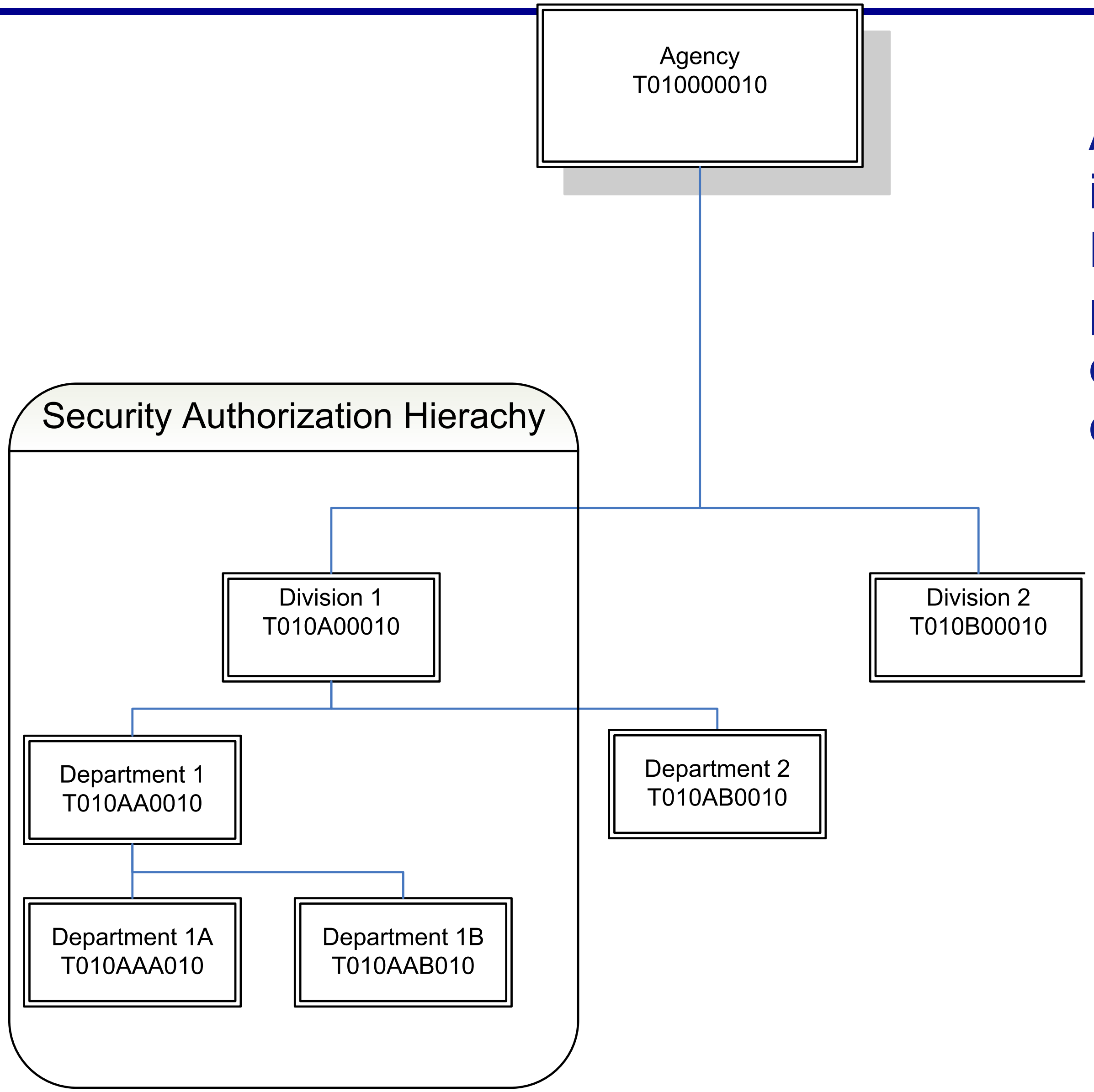
Example 6th Position



All Cost Centers in Division 1 / Department 1 can post transactions on **behalf of each** other

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Example Transaction Codes

- FV50 – Park General Ledger Document (JE)
- FV60 – Park Accounts Payable Document (Direct Pay)
- FMBB – Budgeting Workbench
- FMX1 – Create Funds Reservation
- ZARIDT – Create IDT Bill

Impact to Role Mapping

- All agencies will need to choose a level to control security, across all processes impacted.
  - E.g. AP and AR will need to be at the same level
- Workflow roles will be created with the same cost/fund center level authorizations

QUESTIONS

Agency Support Team Leads Meeting
DATA CONVERSION AND INTERFACE Q & A
Ed Strube, PMO

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Agency Support Team Leads Meeting
ROLE MAPPING UPDATE

Jennifer Rocks

Enterprise Change & Communications Advisor

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Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
General	Display Finance (AA, AP, AR, GL)	ECC	no
Accounts Payable	AP List Voucher Account Assignment	ECC	no
	AP Backup (backup to the AP Lead Workflow)	Workflow	no
	AP Listing Voucher Backup	Workflow	no
	AP Listing Voucher Scan	Workflow	no
	AP Travel Lead	Workflow	no
	AP Listing Voucher Lead	Workflow	Assigned to those mapped to Accounting Lead
	AP Lead	Workflow	Assigned to those mapped to Accounting Lead
	AP Supervisor	Workflow	Assigned to those mapped to Accounting Supervisor

Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
General	**Display Finance (AM, AP, AR, GL)**	**ECC**	**no**
Accounts Payable	AP List V[illegible] Account Assignment	ECC	no
			no
			no
			no
			Assigned to those mapped to Accounting Lead

- This role will grant access to these additional areas.
- Based on Display Access requests by the agencies, the SCEIS team developed this role, in addition to the other display roles such as FM Display, GM Display, Project Systems display, etc.
- All Display roles will be on-line training

Cont'd

Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
Accounts Receivable	AR Invoicing	ECC	Split from AR Clerk & Lead
	AR Receipt Cash	ECC	Split from AR Clerk & Lead
	AR Bank Deposits	ECC	Split from AR Clerk & Lead
	AR Reverse Document	ECC	Split from AR Lead
	AR Customer Master Request	ECC	no
	AR Lead	Workflow	no
	AR Backup	Workflow	no
Funds Management	FM Interagency Transfer	Workflow / ECC	no
	FM Funds Reservations Approver	Workflow / ECC	no
General Ledger	Cross Business Area Journal Entry Park	ECC	no
	GL Backup	Workflow	no
	GL Supervisor	Workflow	no

Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
Accounts Receivable	AR Invoicing	ECC	Split from AR Clerk & Lead
	AR Receipt Cash	ECC	Split from AR Clerk & Lead
	AR Bank Deposits	ECC	Split from AR Clerk & Lead
	AR Reverse Document	ECC	Split from AR Lead

- These 4 roles are derived from the AR Clerk and AR Lead roles. Some agencies needed a segregation of duties.
- Employees mapped to AR Clerk will have the first 3 roles here, and AR Lead will have all 4 roles listed here.
- For role mapping, we will ask that the agency "uncheck", or remove the access already granted that suites their agency
- AR roles will still attend the same training as originally assigned with AR Clerk & AR Lead

Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
Project Systems	Project Accountant (update to role)	ECC	no
	Project Manager (update to role)	ECC	no
	Project Display & Reporting	ECC	no
Sales and Distribution	Sales Master Data Administrator	ECC	no
	Agency Customer Master Data	ECC	no
	Product Costing (Voc Rehab)	ECC	no
Inventory Management	Material Revaluation	ECC	no
Business Warehouse	FI BW Reporting	ECC	no
	MM BW Reporting	ECC	no
Imaging	Imaging Workflow Recipient	OnBase	no
	HR PA Scan Operator	OnBase	no

Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
Project Systems	**Project Accountant (update to role)**	**ECC**	**no**
	Project Manager (update to role)	**ECC**	**no**
	Project Display & Reporting	**ECC**	**no**
Sales and Distribution	Sales Master [illegible] Administrator	ECC	no
Business Warehouse			
Imaging			

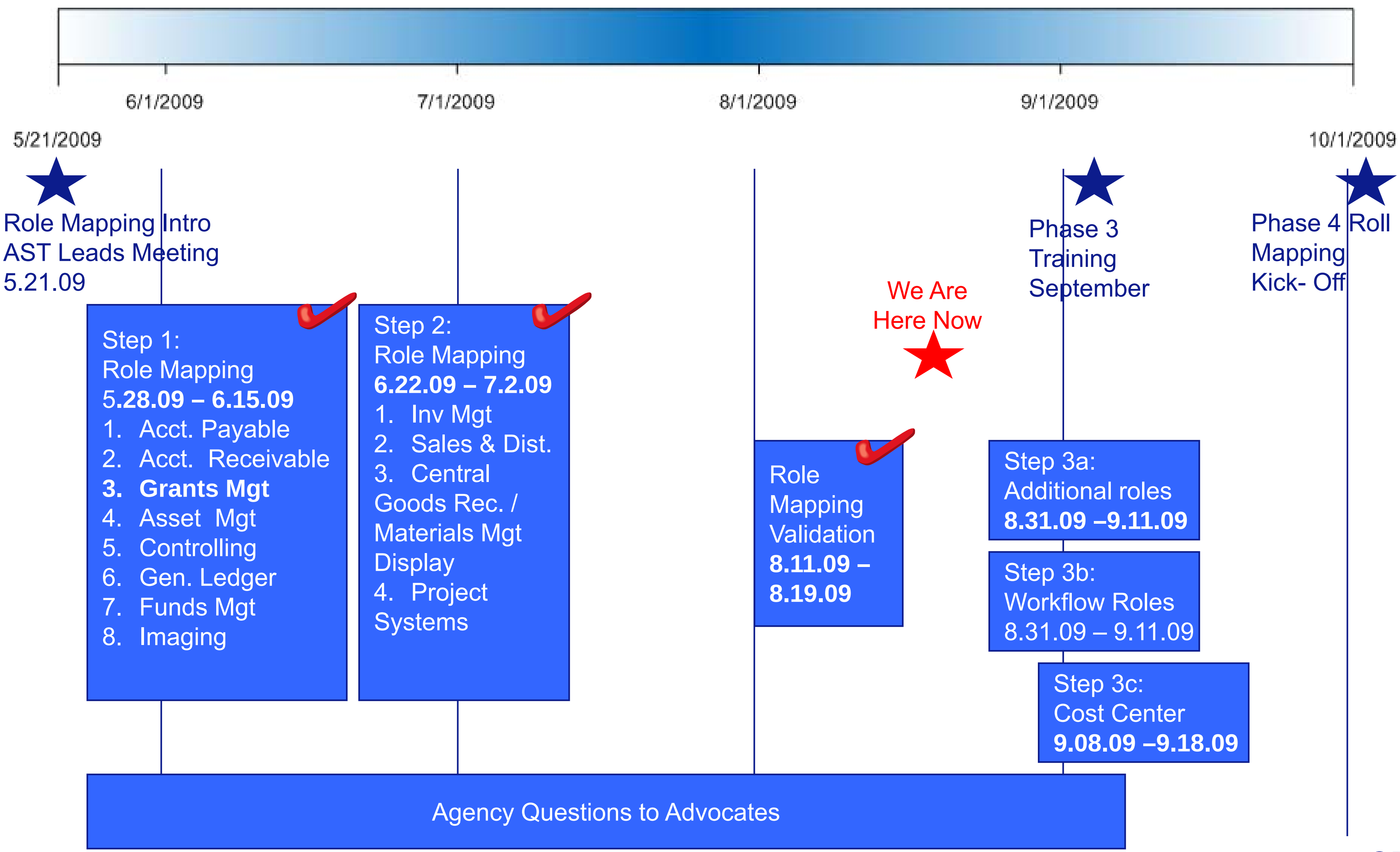
- The Project Systems roles were slightly modified. The Project Accountant and Project Manager absorbed the Project Master Data Maintainer role.
- Agencies will need to remove this role and replace it with a Project Accountant or Project Manager role.
- The Project Display and Reporting role is an additional role.
- Training for PS will be one course for 1.5 days.

Step 3 – Role Mapping: Additional Roles & Workflow

		ECC vs. Workflow Role	Automatic Assignment
Project Systems	Project Accountant (update to role)	ECC	no
	Project Manager (update to role)	ECC	no
	Project Display & Reporting	ECC	no
Sales and Distribution	Sales Master Data Administrator	ECC	no
	Agency Customer Master Data	ECC	no
Inventory Management			
Business Warehouse	**FI BW Reporting**	**ECC**	**no**
	MM BW Reporting	**ECC**	**no**
Imaging	Imaging Workflow Recipient	OnBase	no
	HR PA Scan Operator	OnBase	no

Training for BW will take place after go-live

Role Mapping – Phase 3 Timeline



Role Mapping Updates Pre Go-Live

1. Agencies will receive an up-to-date role mapping worksheet (identical to the role mapping validation worksheet recently collected)
2. As updates to employees occur, please indicate whether the employee is to be added or removed, or a role is to be added or removed. Advocates will routinely remind agencies about changes to role mapping
3. Agency will email the worksheet to their Agency Advocate, on a periodic basis. Agency will also copy the Agency Training Coordinator so that the employee can be enrolled in or deleted from the appropriate courses.
4. For post Go-Live security assignments, Agencies will use the SCEIS User Access Request form (located on the SCEIS website)

Agency Support Team Leads Meeting

EMPLOYEE READINESS

Jennifer Rocks

Enterprise Change & Communications Advisor

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Manager & Supervisor Toolkit Overview

- Audience - managers and supervisors of employees who will be frequent end-users of SCEIS
- Purpose
  - Provide a management perspective of SCEIS
  - Prepare you to discuss job changes and training with employees
- Why is the toolkit needed?
  - Provide information on key upcoming events
  - Eliminate surprises & rumors
  - Promote clear communication between supervisors & employees

Toolkit Contents

- Manager & Supervisor Presentation
- Reference materials that can be distributed to employees:
  - 1-page SCEIS overview
  - Frequently Asked Questions (FAQs)
  - SCEIS glossary
  - Training overview
  - Manager talking points

Steps to Help Prepare Employees

- Review Manager & Supervisor Toolkit and distribute handouts to employees
  - SCEIS Overview
  - FAQs and Acronym sheets
- Conduct staff or group meeting
  - Provide a management perspective of SCEIS
- Conduct one-on-one or small group sessions with end-users
  - Provide information on key upcoming events
  - Eliminate surprises & rumors
  - Promote clear communication between supervisors & employees

Group Meeting

- Hold a group meeting **within the next two weeks** to tell your employees that:
  - SCEIS is really coming!
  - You will be meeting with them one-on-one to talk about changes in the work they do and upcoming training
  - You will be allowed to attend the SCEIS training that is required

- Conduct **anywhere that you and your staff feel comfortable to have a discussion**
  - Keep it short – 10 -15 minutes
  - Keep it simple and upbeat – no need to alarm people
  - Use the Group Meeting Speaking Points handout in your toolkit

Employee One-on-One Meetings

- Schedule conversations with individual employees prior to the start of their instructor-led training (instructor-led training begins on September 8)
- Review notes and Toolkit prior to conversations
  - If appropriate, print SCEIS overview, acronym, training overview and FAQ documents for employee
- Utilize Individual Transition Plans (ITPs) that have been provided to your AST Lead to discuss the roles and training that has been assigned to the employee
- Reassure employees that they need and should attend required training
- Allow employee to ask questions and follow-up with Agency Advocates as needed for assistance
- Provide resources for employee to learn more about SCEIS, such as the SCEIS website (www.sceis.sc.gov)

Agency Support Team Leads Meeting

TRAINING REGISTRATION

Jennifer Rocks

Enterprise Change & Communications Lead Advisor

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SCEIS Registration & Enrollment Overview

- EC&C team will load Phase 3 SCEIS users into the SCEIS Training system
  - SCEIS will "register" users who have been assigned a SCEIS role (role mapping)
- Agencies may enroll students in the appropriate training beginning Monday, August 24th
  - Students are not able to self-enroll
  - Agencies will be able to enroll students in all SCEIS courses
- Students need to be enrolled in the appropriate on-line and instructor-led training
- Confirmation emails will be sent to students for each on-line or instructor-led course that they have been enrolled

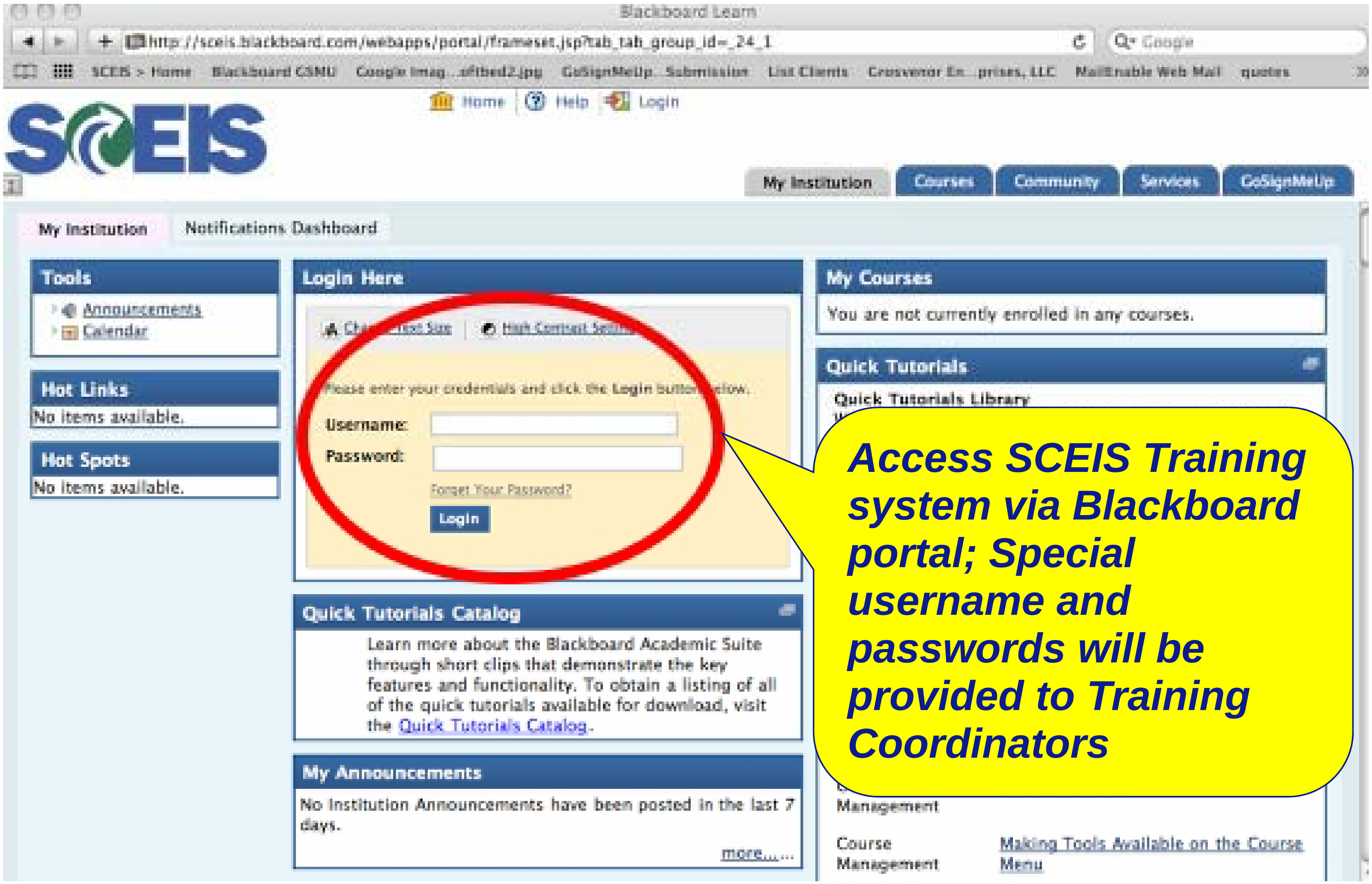
SCEIS Training Enrollment Tools

- SCEIS Training System – on-line system used to enroll students
- Individual Transition Plans – document that lists each employee and the roles and courses assigned to them
- SCEIS Training schedule – spreadsheet that lists the course name, date, time and facility available for all instructor-led courses
- SCEIS Course to Roles crosswalk – spreadsheet that lists each SCEIS course and the roles assigned to that course
- SCEIS Training System Quick Reference Card – document that provides instructions for enrolling students

SCEIS Training System

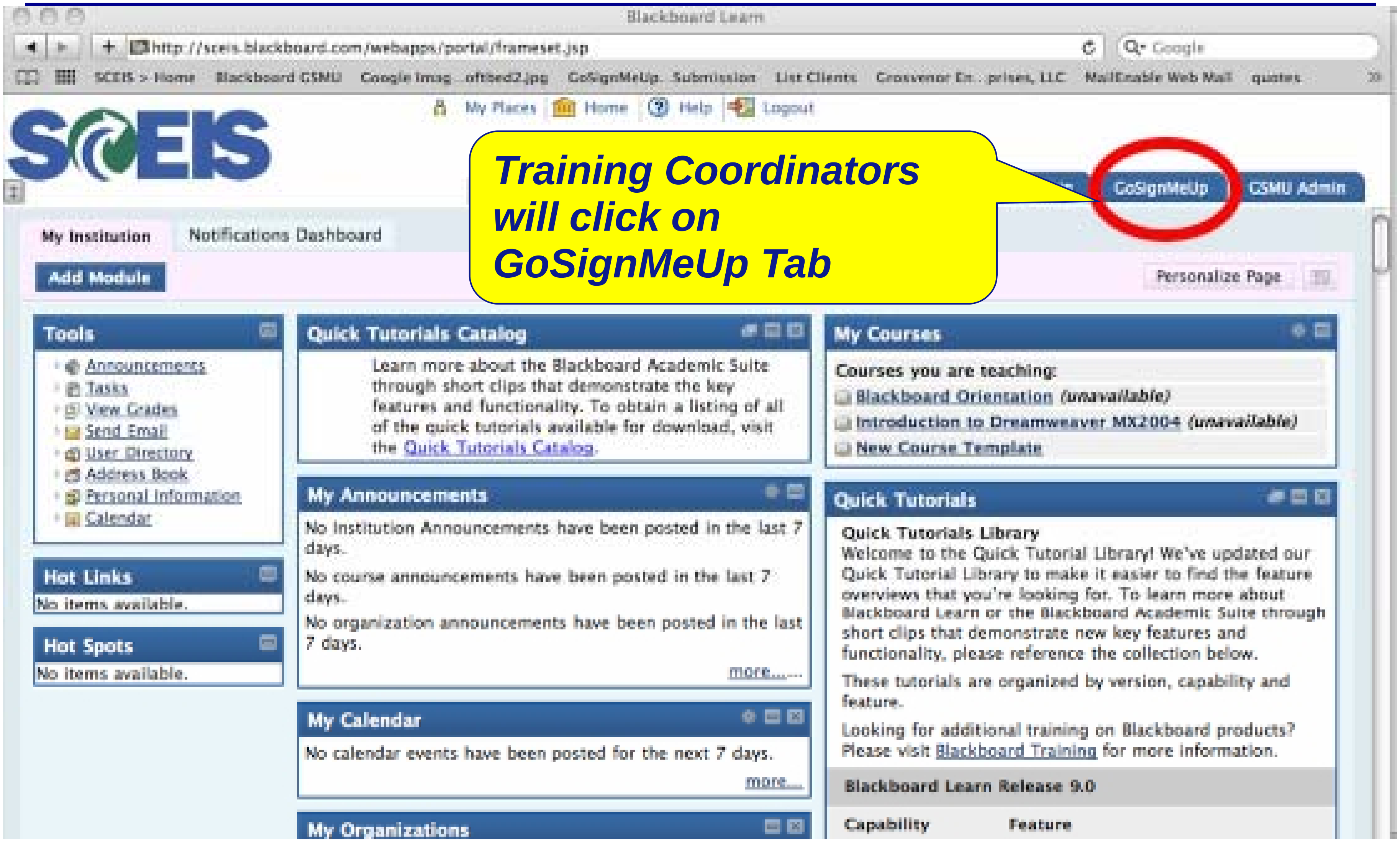
- Utilizing Blackboard technology for managing and facilitating SCEIS end-user training
  - Enroll students (GoSignMeUp)
  - View assigned training courses
  - Complete on-line courses
  - Access instructor-led materials
  - Track and report completion of courses
- Access to SCEIS Training system will be role-based: Student, Trainer, and Training Coordinator

SCEIS Training System

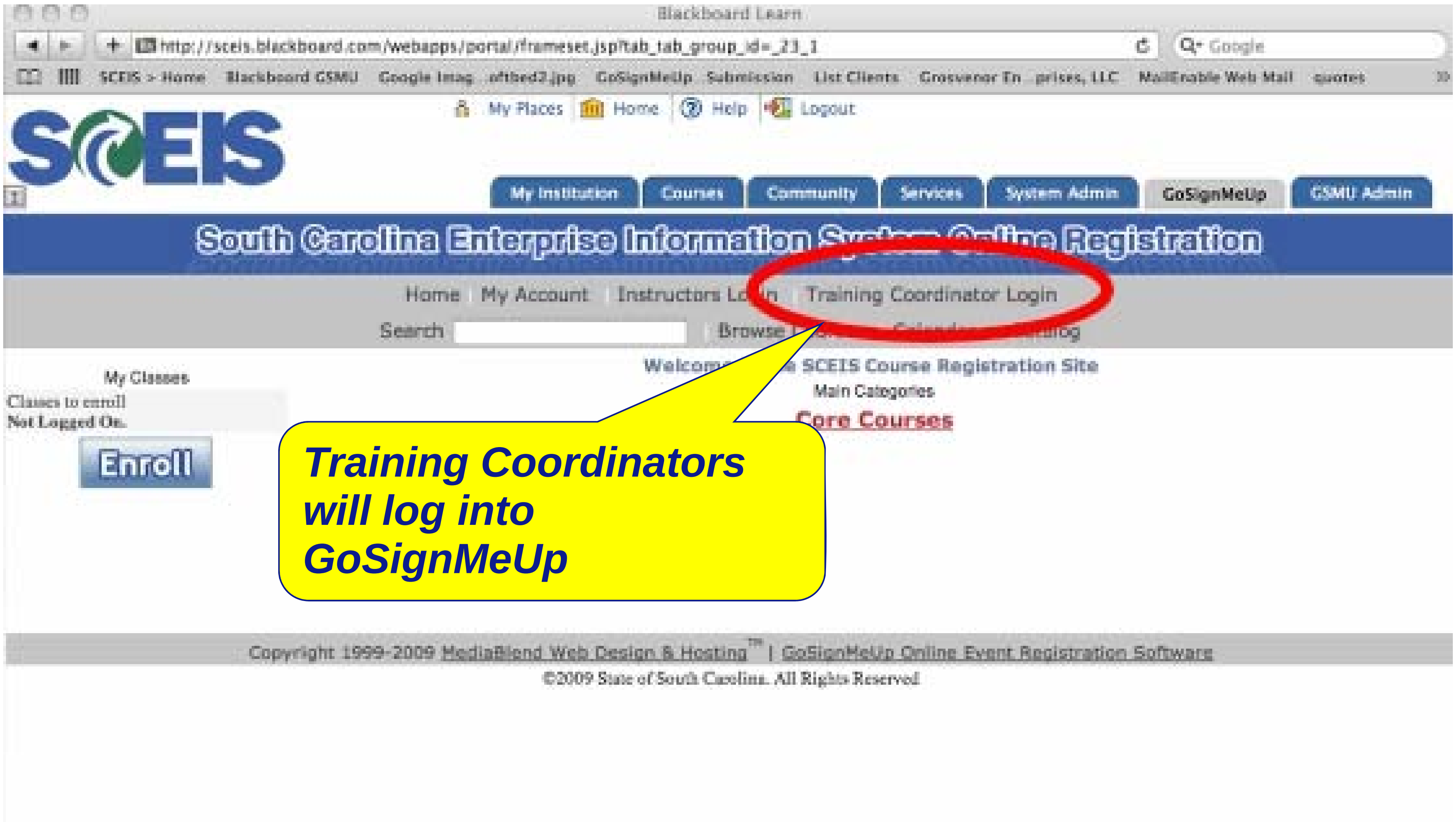


Access SCEIS Training system via Blackboard portal; Special username and passwords will be provided to Training Coordinators

SCEIS Training System, cont.



SCEIS Training System, cont.



SCEIS Training System, cont.

Click on "Enroll Returning Student" and begin to assign courses. "Returning student" means that employee is loaded into system

Training Coordinator

- Access GoSignMeUp tab within SCEIS Training System (Blackboard) to:
  - Enroll students into classes (both on-line and instructor-led)
  - Edit student's records/information, such as adding email addresses
  - Add/drop/cancel courses for employees
  - View enrollment report
  - View Transcript report (courses that have been completed by employee)

Student

- Access SCEIS Training System (Blackboard) to:
  - View courses to complete
  - Access on-line training courses
  - Complete course survey and/or knowledge check
  - Access instructor-led course materials
  - View class/training announcements,
  - Access links to other support materials

Training for the SCEIS Training System

- One hour workshops for training coordinators to enroll students into classes
  - Monday and Tuesday (August 24 and 25); SCEIS, Browning Road, Room 202A
- Notification with RSVP request to be sent to training coordinators today, August 20
- If needed, agency on-site assistance available beginning Wednesday, August 26
- Contact your Agency Advocate if you would like assistance at your agency

Training Completion

Completion of all required SCEIS courses → ***Security access at Go-live***

- At the end of most courses, employees will be asked a series of questions. A 70% passing grade is expected. Employees may take the course as often as needed.
- Some on-line courses may require employees to complete a survey in the SCEIS Training system to show completion of the course.
- Users who do not complete all course requirements and require SAP access at go-live can be granted access on an ***exception*** basis. Agency Head approval will be required in such cases.

SCEIS Training System Next Steps

- Register for SCEIS Training system workshop (SurveyMonkey)
- Begin coordination of class preferences within agency before Monday
  - EC&C to email SCEIS Training schedule to agencies today
  - Add columns for Preference 1, Preference 2, and Preference 3
- Review updated Individual Transition Plan (ITP) reports
  - EC&C to email reports today and tomorrow
- Contact your Agency Advocate if you would like assistance at your agency for enrolling employees

Agency Support Team Leads Meeting
UPCOMING ACTIVITIES
Tammy Mainwaring
Enterprise Change & Communications Lead

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Upcoming Activities

- Complete training enrollment for SCEIS FI and MM training
- Complete legacy application modifications for interface to SCEIS
- Complete employee group and/or one-on-one discussions with FI and MM employees
- Validate technical readiness/user connectivity (September 15)
- Provide Project Systems Types and Project Manager data (Project Systems agencies only)

Upcoming Activities

- AST Lead meeting – *Thursday, September 17, 9:00 a.m. Midlands Technical College, Airport*
- *Agency Training Coordinator meeting – Thursday, September 17, 11:00 a.m. Midlands Technical College, Airport*