



BEACON

North Carolina

Office of the State Controller

BEACON Agency Change Control Board Kick-Off

Wednesday, January 28, 2009

Agenda



Agenda Item	Speaker(s)	Duration
Welcome	Jim Dolan	5 min
Meeting Purpose and 2008 Highlights	Jim Dolan	15 min
Change Control Process	Libby Williams	40 min
BREAK		10 min
Release Plan	Libby Williams/ Don Childrey	60 min
Next Steps & Wrap-up	Libby Williams	15 min
Total		2hrs 25 mins

Purpose & Objectives

- Purpose
 - Share process for agencies to submit new functionality and enhancement requests to the BEACON system
 - Review release plan strategy for 2009
- Objectives
 - Review CCB submission process
 - Address questions regarding CCB process
 - Ensure understanding of roles and responsibilities in CCB process

Change Control Defined

- The BEACON Change Control Board's mission:
 - Provide an organized approach for submission, prioritization, and release of stakeholders enhancement and new functionality requests to the BEACON HR/Payroll System
- The BEACON Change Control Board will:
 - Assess and prioritize change requests
 - Assign approved change requests to scheduled releases
 - Communicate with stakeholders through quarterly meetings, newsletters, and personal contact when appropriate

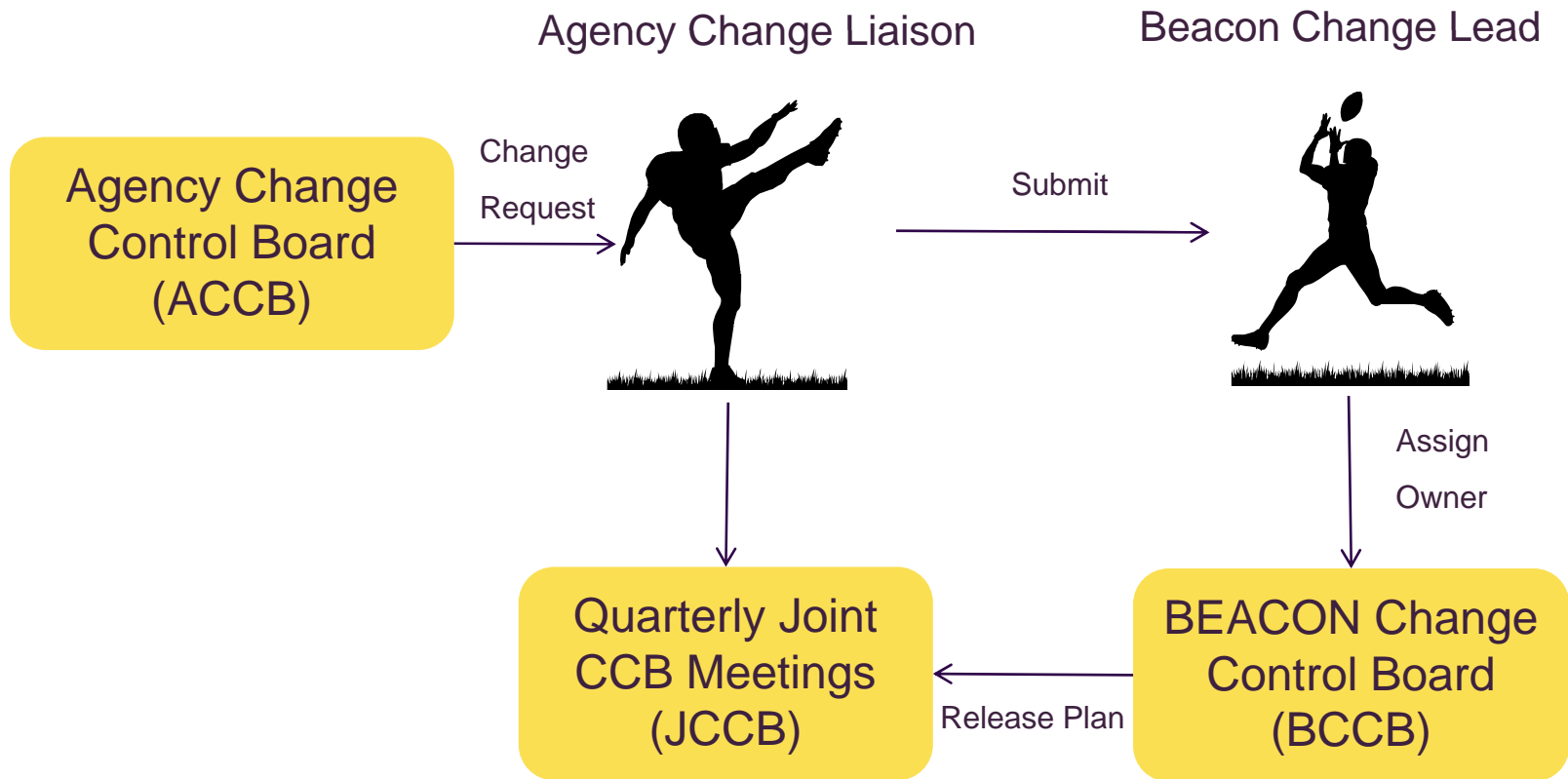


2008-09 Highlights

- 8000+ negative quota balances fixed
- ~ 40 new BI reports created since go-live
 - including EEO, LI, salary comparison reports
 - Enhanced longevity report
- Conversion of holiday leave to holiday comp automation
- Pay statement enhancements
- Year-end vacation roll-over to sick leave
- OrgPlus pilot program
- W-2 processing
- NC Flex and SHP enrollments successful

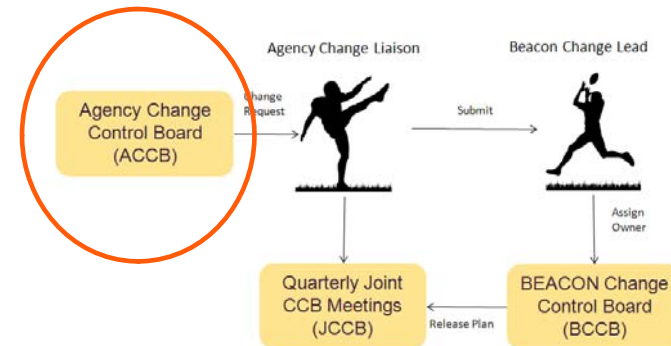
Change Control Process

Key Players



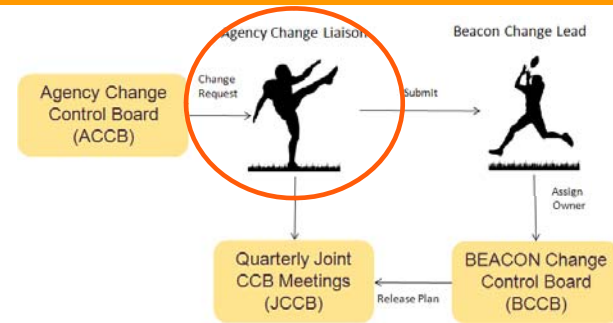
Agency CCB

- Charter:
Review and prioritize agency new functionality requests for the BEACON HR/Payroll System
- Proposed Agenda
 - Status of submitted requests
 - Review of items in upcoming BEACON HR/Payroll release
 - Review of new requests to be submitted to OSC BEACON CCB
- Recommended attendees
 - Agency Change Liaison - Chair
 - HR Director
 - HR Core User(s): OM, BN, PA
 - Payroll Core User(s): Payroll Officer, Time Admin, Leave Admin



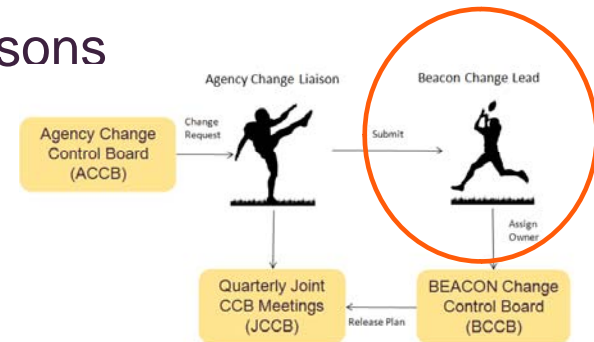
Agency Change Liaison – R & R

- Agency point of contact for enhancement and new functionality requests
- Conduct internal Agency CCB Meetings
- Meeting frequency should be at a minimum quarterly
- Complete and send in change request forms
- Communicate to your agency the status of change requests and the release plans
- Attend quarterly update meetings



Beacon Change Lead - R & R

- Point of contact for Agency CCB Liaisons
- Chair BEACON CCB Meetings
- Maintain repository for CCB documents
 - BEACON CCB Website contains forms, presentations, release plans
 - http://www.ncosc.net/BEST/change_control.html
- Communicate with agencies the status to change requests
- Organize quarterly agency CCB update meetings



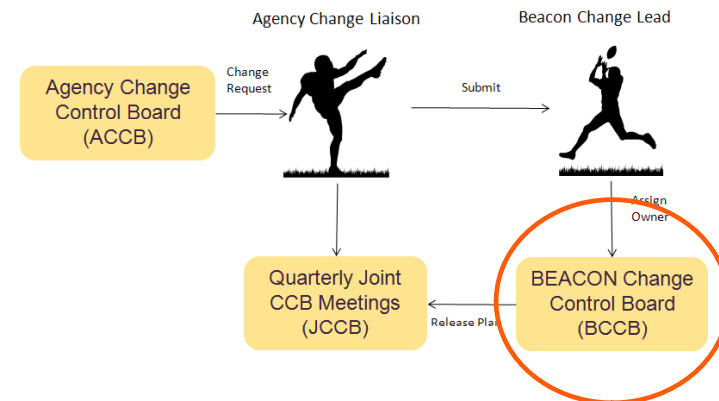
BEACON CCB

- Meeting Agenda
 - Review/verify upcoming release deliverables
 - Review, assign owner, prioritize, and disposition new requests
 - Review issues

- Meeting frequency is weekly; planning bi-weekly in Q2'09

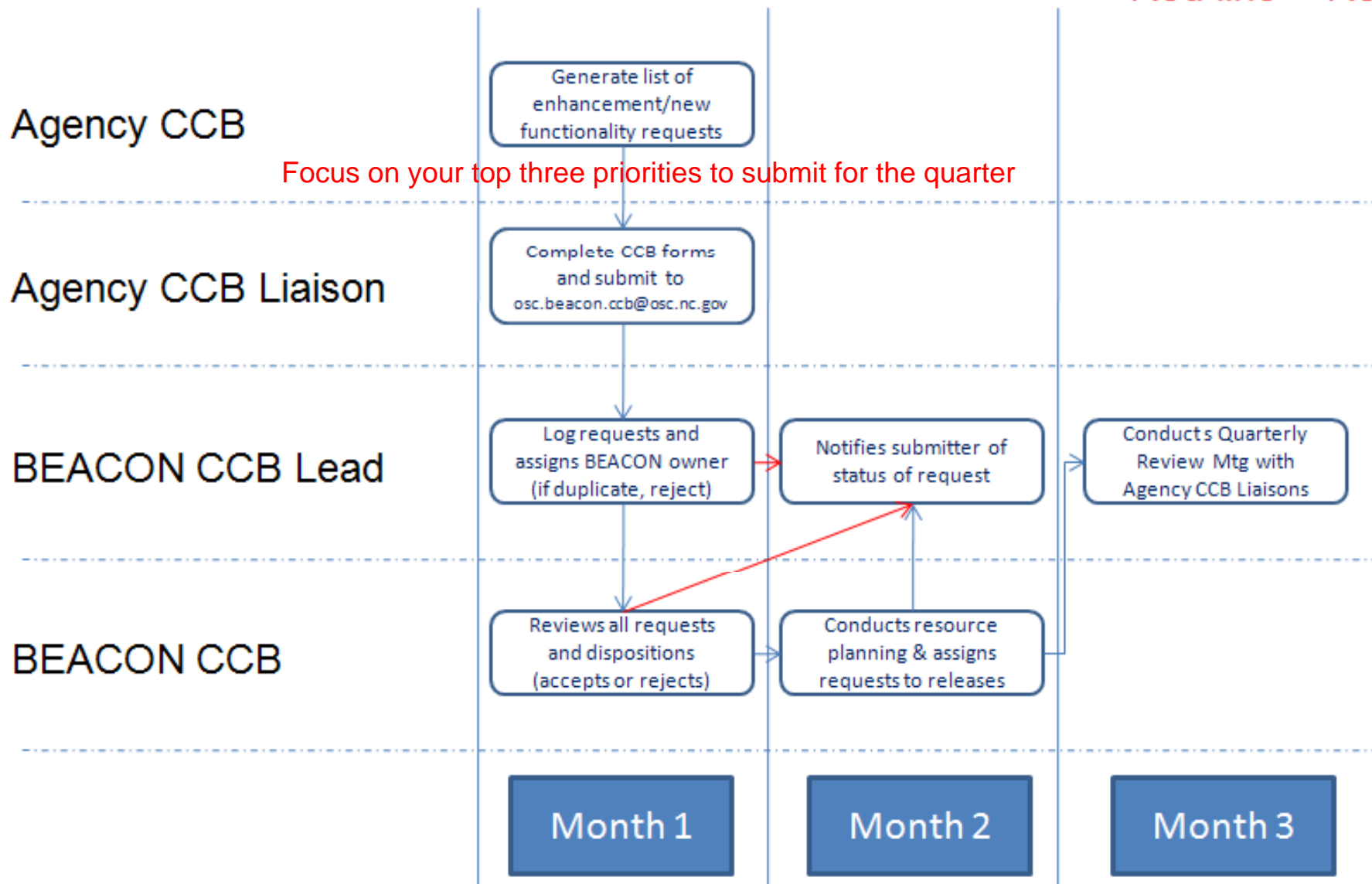
- Membership

- Chair: Libby Williams
- Mgmt Sponsors: Jim Tulenko and Jim Dolan
- BEACON Functional Team
- BEACON Technical Teams
- BEST Shared Services
- OSP: Dusty Wall
- State CIO: Jamie White and Nathan Herber



Agency Submission Process

Red line = Reject



Change Request Form - Template

Agency BEACON Change Request Form

(Form can only be submitted by Agency Change Liaison)

Agency: _____ Enhancement New Functionality

What area is this request pertaining to?

Payroll Time Personnel Administration Org Management Benefits Finance Security ESS/MSS

Business Intelligence (BI Reporting) Other

Description of Request: _____

Requested Completion Date: _____

Reason for Date Given: _____

Reason for Change (check one): Legislative Enhanced Process

Impact of Change (check one): # of Impacted Employees Productivity Improvement (Explain Below)

Business Justification: _____

Change Request Form - Example

Agency BEACON Change Request Form

(Form can only be submitted by Agency Change Liaison)

Agency: **DENR** Enhancement New Functionality

What area is this request pertaining to?

Payroll Time Personnel Administration Org Management Benefits Finance Security ESS/MSS

Business Intelligence (BI Reporting) Other

Description of Request:

Need to be able to save report formats in BI so that we do not need to regenerate each time;

Requested Completion Date: **3/1/08**

Reason for Date Given:

need to generate reports rapidly; currently can take up to 30 minutes to reformat report.

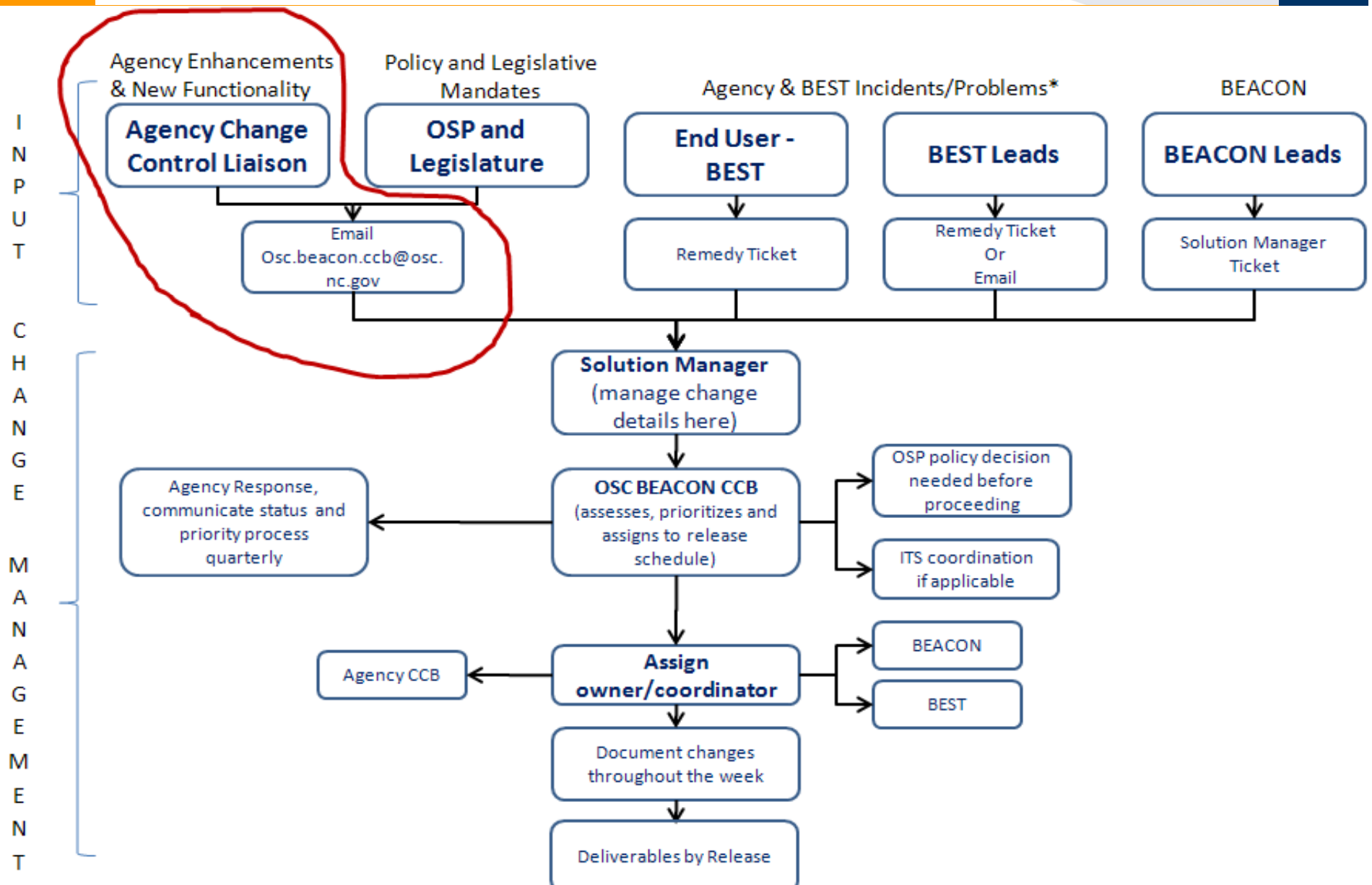
Reason for Change (check one): Legislative Enhanced Process

Impact of Change (check one): **10 core users** # of Impacted Employees Productivity Improvement

Business Justification:

On Monday mornings, we generate vacancy, actions, and various other employee reports for our weekly staff meetings. It currently takes about 30 minutes to generate each report because we have to do the reformatting. It would save lots of time and prevent errors if the formats were saved so that we can easily retrieve them.

BEACON Change Management Process



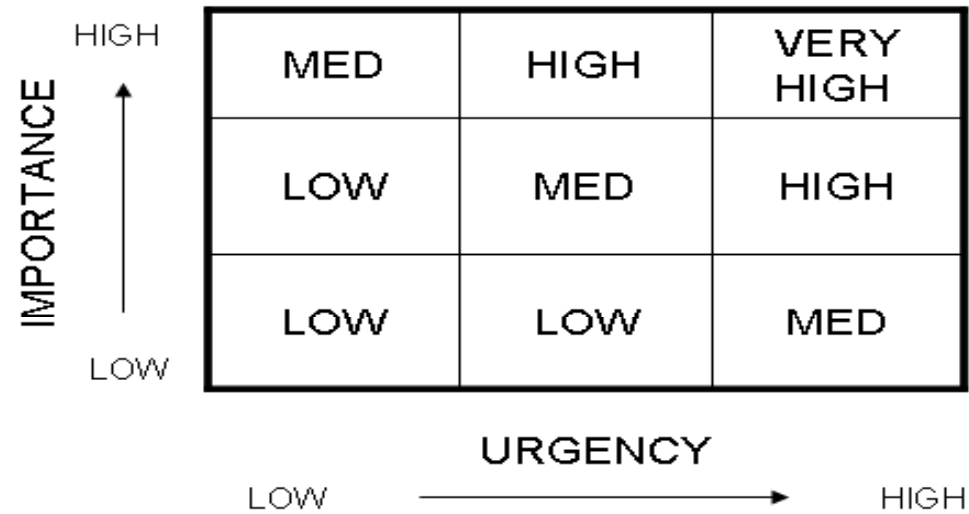
Priority Setting

1st Level: Sort by non-discretionary vs. discretionary

Nondiscretionary Requests (Must be addressed)	
Mandatory	System totally stopped, no workaround exists. Major security or regulatory requirement.
Incidents/problems (break/fix)	Process has stopped, no workaround, major impact or severe data integrity issue.
Policy change requests	Changes received from OSP.
Discretionary Requests (Should be reviewed and prioritized)	
Enhancement Requests	Usually business critical or process critical and enhances existing functionality already active in the system
New Functionality Requests	New functionality to enhance the user experience

Priority Setting cont.

2nd Level: Give a priority setting



Priority Setting cont.

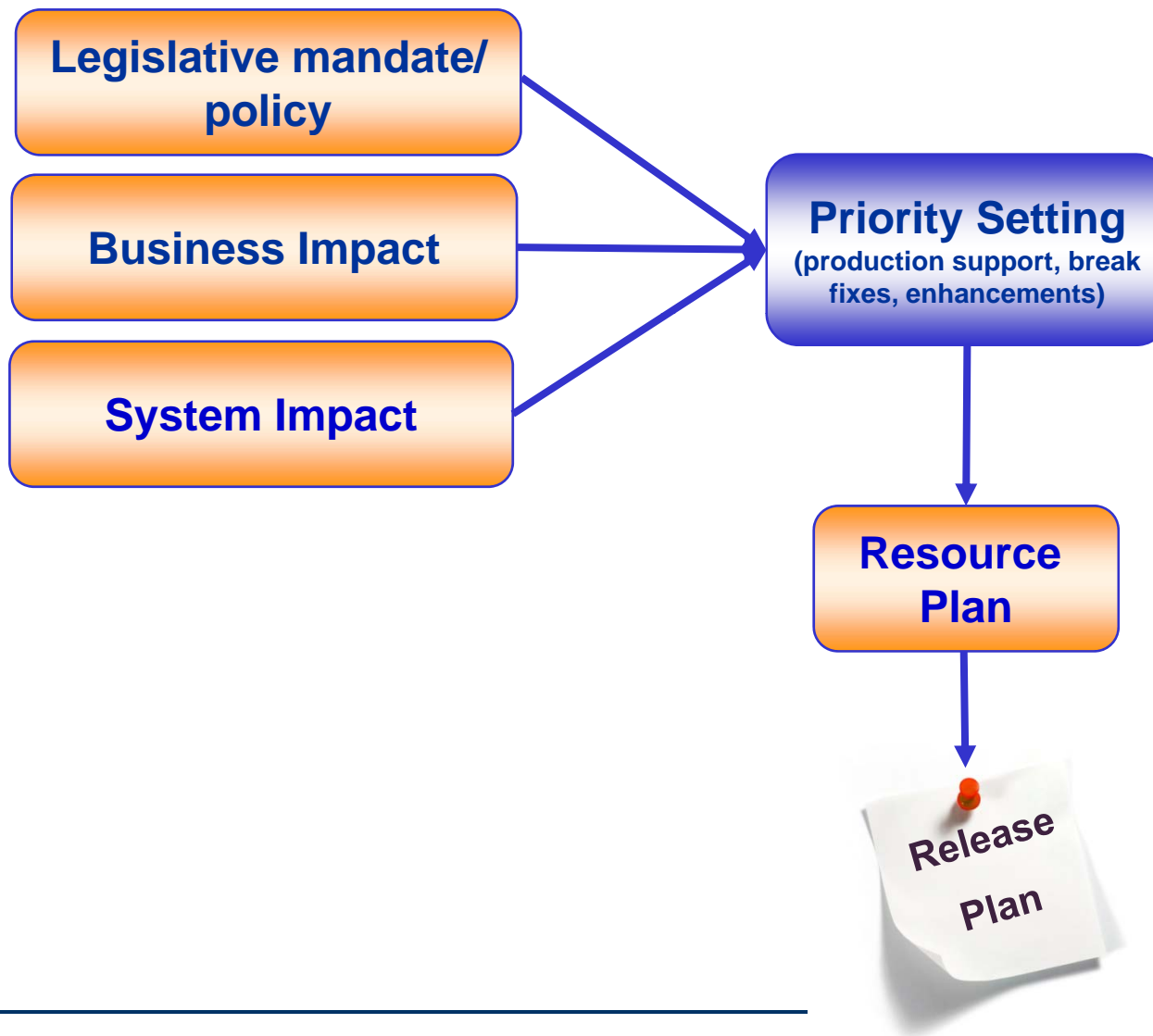
3rd Level:

Provide a business and technical score from internal analysis

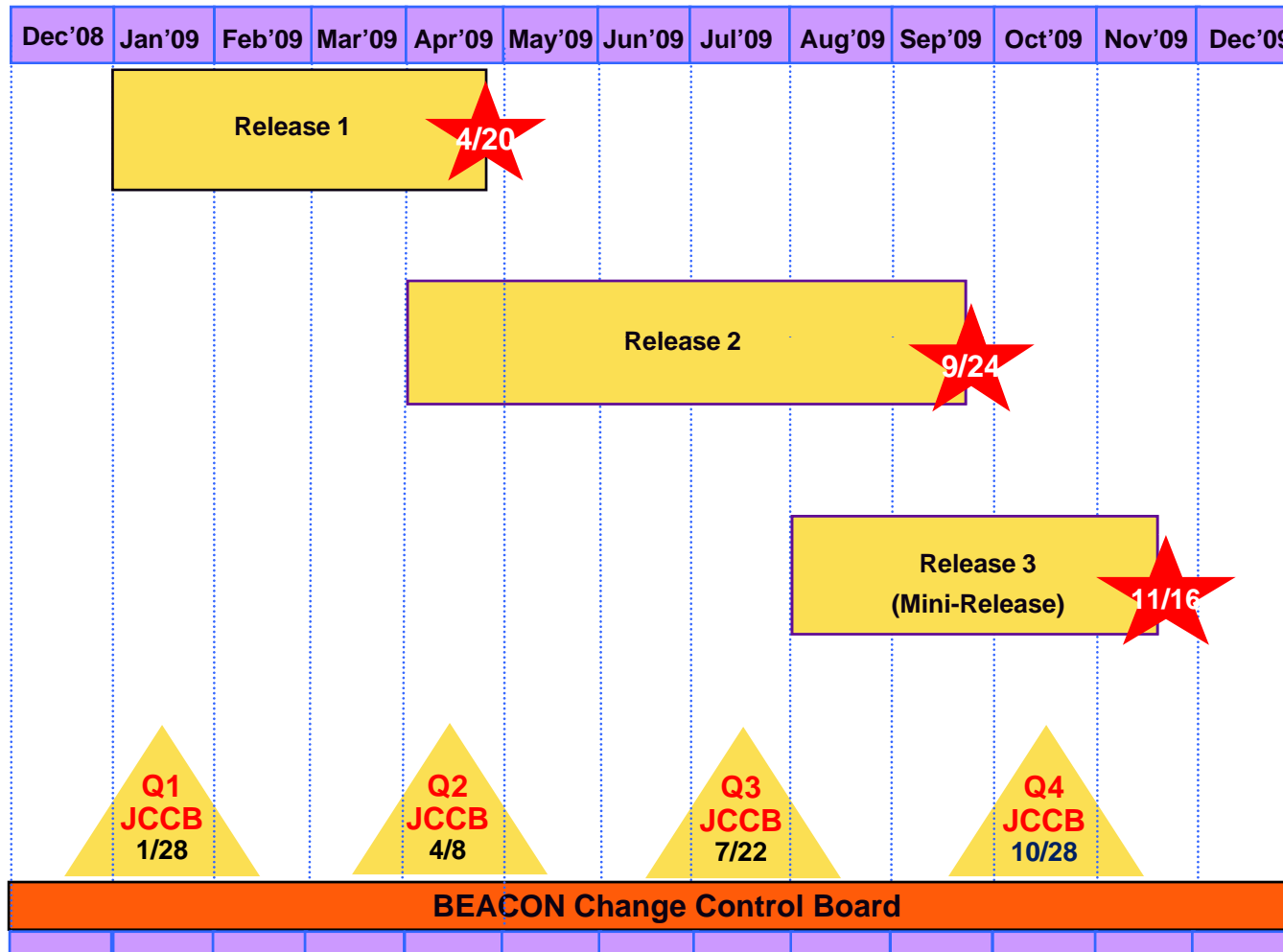
Non-Discretionary		yes/no	1
1	Is this item mandated by legislation or other legal requirements?	No	
2	Does this item support on-demand research or reporting for the Executive Branch?	No	
3	Does policy, rule have to implemented in the system?	Yes	1
Business (Discretionary)		yes/no	12
1	Is this item mandated internally by a specific agency policy, if so list policy reference or include copy of policy?	No	
2	Does this item support significant improvements to business process efficiencies?	yes	1
3	Is this item time sensitive - due within the next week?	No	
4	Is this item time sensitive - due within the next month?	yes	3
5	Is this item time sensitive - due within the next 3 months?	No	
6	Is this item time sensitive - due in over 3 months?	No	
7	Does this item resolve significant problems and/or issues affecting less than 100 users?	No	
8	Does this item resolve significant problems and/or issues affecting between 100 and 1000 users?	No	
9	Does this item resolve significant problems and/or issues affecting between 1000 and 10000 users?	No	
10	Does this item resolve significant problems and/or issues affecting more than 10000 users?	yes	4
11	Does this affect pay?	No	
12	Does the item fulfill commitment or promises made to any agencies?	yes	1
13	If implemented, will the item be transparent to the customer?	yes	
14	Is there a negative impact to data quality if we don't do this?	yes	3
15	Is there financial benefit - < \$100k	No	
16	Is there financial benefit - > \$100k and < \$500k	No	
17	Is there financial benefit - > \$500k	No	
Internal Questions (OSC/BEACON)			2
1	Does this change support significant improvements to technical process efficiencies?	No	
2	Are there technical cost-effective alternatives available?	No	1
3	Does this item increase annual recurring budget costs < \$50k?	No	
4	Does this item increase annual recurring budget costs >\$50k and <\$100k?	No	
5	Does this item increase annual recurring budget costs >100k?	No	
6	Does this item require one-time cost < \$50k?	No	
7	Does this item require one-time cost >\$50k and <\$100k?	No	
8	Does this item require one-time cost >100k?	No	
9	Is this item dependent on another item?	No	
10	Is another item dependent on this?	No	
11	Is there a negative impact to performance if we don't implement this item?	No	
12	Is there a negative impact to performance if we do implement this item?	No	1
13	Is the time required to implement this item less than 1 week?	No	
14	Is the time required to implement this item between 1 week and 1 month?	No	
15	Is the time required to implement this item between 1 month and 3 months?	No	
16	Is the time required to implement this item greater than 3 months?	No	
17	Are there cost- effective business alternatives available?	No	

Release Plan Strategy

Release Planning



Planned Releases for 2009



NOTE:

There will be instances where bug fixes, or enhancements will go in the system on dates other than the release dates; we'll take these on a case by case basis.

JCCB = Joint Change Control Board

Release 1 – Benefits

Ticket #	Deliverable	Notes
E	Updates to termination letter	Requires updates to 457 Plan due to vendor changes and adding Critical Illness information -new plan offering
E	Updates to LOA letter	Requires updates due to new plan Critical Illness.

Release 1 - Business Intelligence

Ticket #	Deliverable	Notes
BF	Org Unit hierarchy	Correct issues with reports when there are changes in the Org Structure (movement of positions or Org Units)
N	Enable "Save As" feature on reports	Allow an end-user to save their version of a report for later retrieval (dependent upon delivery of "Federated Portal" project)
N	PA add IT0052 info to BI reports	Add Range Revision balances to Employee Actions BI reports
N	886 – EEO reports	Create Legislatively mandated SB-886 reports

Release 1 – Org Management

BF/E/N	Deliverable	Notes
E	PPOSE-IT9022-SOC Code	Cosmetic changes to PPOSE transaction to rename the SOC code tab and to make other improvements as needed.
E	OM Jobs Report to show Start & End dates	Job report showing start and end dates for reporting on when jobs became active or inactive.

Release 1 – Payroll

BF/E/N	Deliverable	Notes
E	ORBIT change for retro reporting	Retroactive amounts covering more than one pay period need to be separated out into separate records when reported to the Retirement System.
N	Create payroll journal for employer expenses	Produce a version of payroll journal which also includes employer expenses
N	Bureau Census Report	Required US Census Bureau report – NC 9901
E	Combined Campaign interface	Load employee SECC contributions

Release 1 – Time

BF/E/N	Deliverable	Notes
BF	Time Statement Delivery (Jan'09)	Employee Time Statement showing beginning and ending balances, accruals, leave taken, adjustments, etc.
N	Mass Printing of Time Statement (Jan'09)	Program to allow for printing Time Statement in mass, similar to mass print of Pay Statements
E	FMLA Configuration – Allow Holiday Leave	Allow holiday leave to be counted toward FMLA
N	Add option to comp additional hours worked	Option to comp or pay additional hours for <ul style="list-style-type: none"> •Hours worked between 160 and 171 for LEO's on 28-day overtime periods. •Hours that result from pay-enhancing leave •Hours worked by part-time employees beyond their planned hours.

Release 1 – ESS/MSS

BF/E/N	Deliverable	Notes
BF	Cannot delete leave request	Leave requests that have not been approved prior to the date of the leave request can not be deleted.

Other deliverables

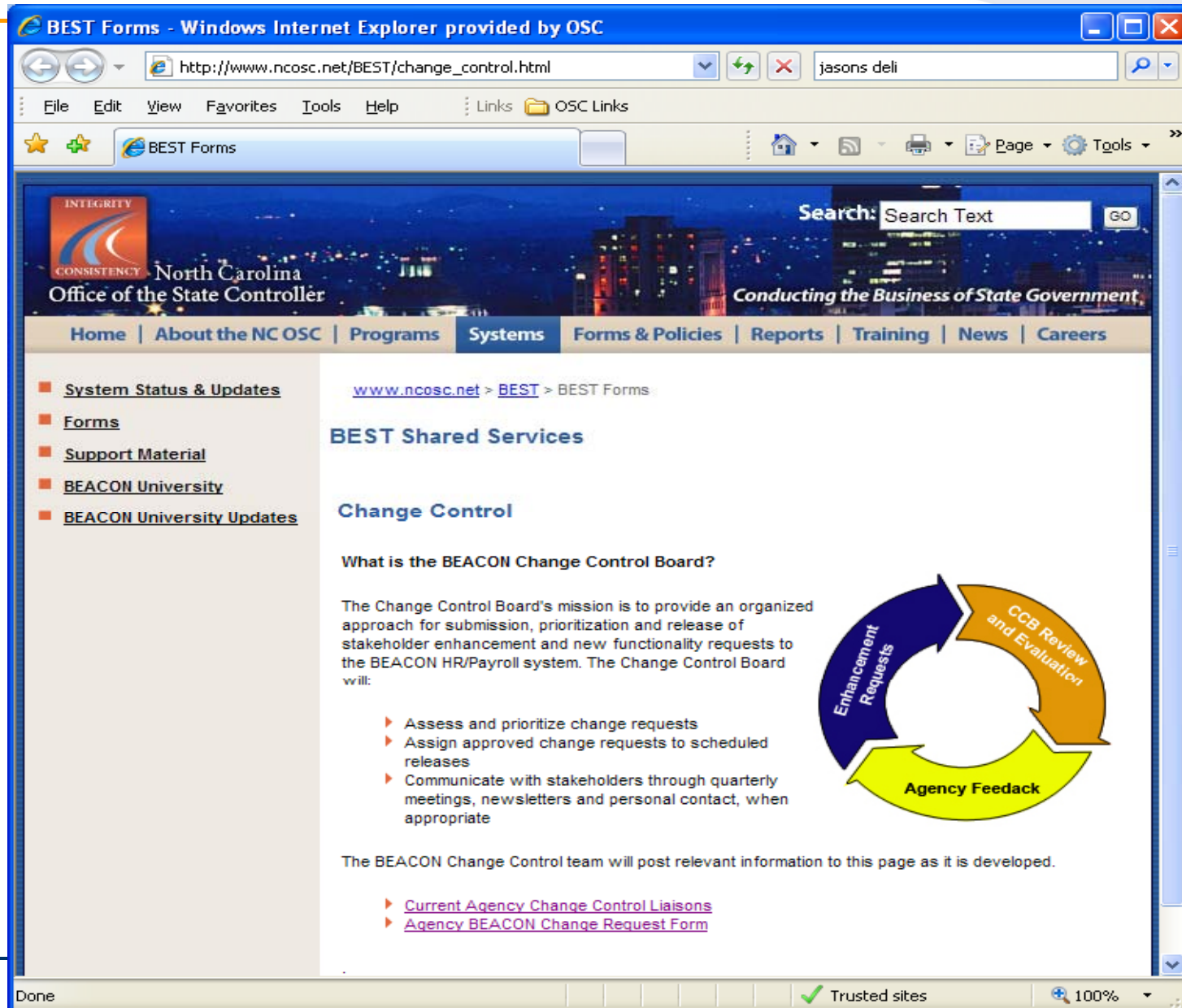
Area	Deliverable
Benefits	HRBENUSC0B01 Cobra Collection Event
Benefits	BN: Dental Census File
Finance	Develop Escheat Program/Process - Letter Only
Portal	Federated Portal
Portal	Federated Portal Stress Testing
Portal	DEV:W2 reprint - activate iView DEV
Finance	Test I027 Interface with Revenue
Finance	Change I036 FI to CMCS interface
Finance	Interface P000 data to NCAS monthly

Agency Change Liaisons

Agency Change Liaisons

Agency	Name	Agency	Name
Agriculture	McNair, Rosilyn	ESC	Avent-Kindred, Gloria
AOC	Wiggins, Margaret	ITS	Frazier, Pam
Auditor	Baggett, Cheryl	JJDP	Guzman, Patricia
CCPS	Domico, Dan	NC Auctioneer Licensing Board	Watson, Teresa L
Commerce	Mottershead, Chet	NC Board of Barber Examiners	Braam, Kelly
Corrections	Williford, Vicki	NC Board of Cosmetic Arts	McCloskey, Traci
DCR	Prout, April	NCCCS	Phillips, Jane
DCR (Battleship Comm.)	Rollinson, Elizabeth	NCEL	Clayton, Anna
DENR	Davis, Rod	NCSSM	Boyce, Connie
DHHS	Gruer, Kathy	NCSU	Simet, Brian
DOA	Williams, Barbara	OAH	Winston, Camille
DOI	Howell, Lisa	OSBM	Hairston, Ursula
DOJ	Gibson, Barbara	OSC	Dicken, Helen
DOL	Lipscomb, Nancy	OSP	Warburton, Brenda
DOR	McKinney, Eric	SHP	Harris, Beverly
DOT	Mccray, Angela	SOS	Shehdan, David
DPI	Knower, Kris	UNC - General Administration	Canady, Gwen
Elections	Russell, Ronda	WRC	Batker, Carol

BEACON Change Control Website



The screenshot shows a Windows Internet Explorer browser window displaying the BEACON Change Control website. The browser's address bar shows the URL http://www.ncosc.net/BEST/change_control.html. The website header features the BEACON logo and the text "North Carolina Office of the State Controller" and "Conducting the Business of State Government". A navigation menu includes links for Home, About the NC OSC, Programs, Systems, Forms & Policies, Reports, Training, News, and Careers. A search bar is located in the top right corner.

The main content area is titled "BEST Shared Services" and "Change Control". It includes a section titled "What is the BEACON Change Control Board?" which describes the board's mission and lists its functions:

- ▶ Assess and prioritize change requests
- ▶ Assign approved change requests to scheduled releases
- ▶ Communicate with stakeholders through quarterly meetings, newsletters and personal contact, when appropriate

A circular diagram illustrates the process flow: "Enhancement Requests" (blue arrow) leads to "CCB Review and Evaluation" (orange arrow), which leads to "Agency Feedback" (yellow arrow), which then loops back to "Enhancement Requests".

The page also includes a list of links:

- ▶ [Current Agency Change Control Liaisons](#)
- ▶ [Agency BEACON Change Request Form](#)

The browser's status bar at the bottom shows "Done", "Trusted sites", and "100%" zoom level.

Next Steps

- Next CCB Meeting Schedule
 - When: Wednesday, April 8, 2009 – 9am-noon
 - Where: BEACON Building at 3514 Bush Street
 - Agenda (Tentative):
 - Update/status of Release 1
 - Review of agency submitted requests (remember to submit top 3)
 - Plans for Release 2 (if available)
 - Review of CCB metrics
- Confirm your agency's change liaison; if changes, then send updates to osc.beacon.ccb@osc.nc.gov

BEACON CCB Contacts



BEACON Change Control Contact

Libby Williams - Lead

Email – libby.williams@osc.nc.gov

Phone – 919-431-6623

Jim Tulenko – Mgmt Sponsor

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Phone – 919-431-6520

Jim Dolan – Mgmt Sponsor

Email – jim.dolan@osc.nc.gov

Phone – 919-431-6511

BEACON Change Control Website:

http://www.osc.nc.gov/BEST/change_control.html

BEACON Change email address:

Beacon.osc.ccb@osc.nc.gov

Questions?