



MEETING MINUTES

State of Louisiana ERP Project

LA-RP-001

Blueprint Workshop / Linear Assets: Reporting & Analysis

1 Day; 11/18/2008 @ 08:30 to 4:30

Location: DOTD HQ Annex Building

Attendees:

No.	Name	Invited?	Attended?	Comments
1.	Mark Suarez	Y	Y	ERP
2.	Boyd Barbier	Y	Y	ERP
3.	Charles Pilson	Y	Y	ERP
4.	Shanker Shrestha	Y	Y	ERP
5.	Deanna Sowards	Y	Y	ERP
6.	Amanda Ratcliff	Y	Y	DOTD
7.	Deidre Hill	Y	Y	DOTD
8.	Lori Humm	Y	N	DOTD
10.	Mike Cannon	Y	Y	DOTD
11.	Carmen Hernandez	Y	Y	DOTD
12.	Rhonda Foster	Y	Y	DOTD
13.	Ronald Hudson	Y	Y	Agile Assets
14.	Chad Vossburg	Y	Y	DOTD
15.	Jackie Rogillio	Y	Y	DOTD
16.	Jude Lassergine	Y	Y	DOTD
17.	Cawanda Lockman	Y	Y	DOTD
	District 02			Via Video Conference (Not received sign-in sheet)
	District 03			
	Roylene Hulin	Y	Y	DOTD
	Betty Malgrough	Y	Y	DOTD
	District 04			Via Video Conference
1.	John Sanders	Y	Y	DOTD
2.	Jill Skinner	Y	Y	DOTD
3.	Richard Haynes	Y	Y	DOTD
4.	Darrell Goza	Y	Y	DOTD
5.	B Keith Tindell	Y	Y	DOTD
6.	Patricia Anderson	Y	Y	DOTD
7.	Don Maddox	Y	Y	DOTD

	District 08			Via Video Conference
1.	Thelma Woodward	Y	Y	DOTD
2.	Kent Hardin	Y	Y	DOTD
3.	Robert Martin	Y	Y	DOTD
4.	Jana Procell	Y	Y	DOTD
5.	Pam Gates	Y	Y	DOTD
	District 62			Via Video Conference (Not received sign-in sheet)

<i>Agenda Item and Notes</i>	<i>Owner(s)</i>	<i>Action Items & Assignments</i>	<i>Comments / Follow-up</i>
1. Logistics, Ground Rules, & Introduction	Mark Suarez	<ul style="list-style-type: none"> • None 	
2. Project Timeline	Mark Suarez	<ul style="list-style-type: none"> • None 	
3. Workshop Objectives	Mark Suarez	<ul style="list-style-type: none"> • None 	
4. Business Process Review <ul style="list-style-type: none"> • Glossary • Concepts & functionality • Leading practices • Enterprise readiness challenges 	Charles Pilson	<ul style="list-style-type: none"> • See action items & assignments below. 	Hard copies provided

5. Action Items

Person Assigned	Action Item	Additional Comments/Notes
Rhonda Foster	1. Provide a list of ZW reports	
Thelma	2. Performance Indicator Reports	
Thelma	3. Fax copy of accident report to Mark	
Charles Pilson/Mark Suarez	4. Collect information on how storm reporting data is done in other SAP modules (FEMA, Facilities, and Building)	
Charles Pilson/Mark Suarez	5. How to handle storm related project numbers in SAP	
Lori Humm	6. Will location information be passed to SAP?	
Rhonda Foster	7. Get missing data information reports from Rhonda	
Charles Pilson	8. Check that ZP136, ZT06 and ZT33, ZT29 will still be available in SAP HR	
Everyone	9. Send copies of anything you capture in Excel that is a regular report that you use	
Charles Pilson/Mark Suarez	10. Talk to district and maintenance managers about report requirements	
Charles Pilson/Mark Suarez	11. Talk to Ron regarding contributions to and reporting from BI.	
Charles Pilson/Mark Suarez	12. How to tie together Work Orders for Storms/etc that later becomes FEMA reimbursable?	

Discussion:

INTRODUCTION

Today's session is on **reporting requirements**, data required. Please provide copies of those to Mark.

- Is there a report that you often have to provide to your management?
- What additional data needs to be collected to provide those reports?

- Main reports used at different levels at the agency; reports that you use yourself or reports given to bosses?
- FEMA reimbursement information?
- Is there information that you need to be capturing?

This is the last formal blueprint session. We have moved from the high level planning to scheduling, to execution of the work (day cards, done in Z-WORD). Today we are looking at reports that are created from all the information that we collect.

THINK ABOUT: Is there information that we are not putting in that you might need in a report?

Goal is to get everyone to report on their basic reports.

***QUESTION:** What if DOTD provides a list of reports and the day after the system is setup, we think of more reports we need? Charles says the system is very flexible, that people will be trained to create reports as needed. The point is if there is information being collected, you should be able to get a report out of it.*

REPORTING BASICS

Charles will present an overview of how reports work in Agile Assets as a way to help you think about what types of reports that you will need. Reporting is the management part. The main source of report data is the database itself. In Agile, you can always right-click and export any data on the application window and sub-windows (Ad-hoc reporting). If you can see it on a screen, you can get the data out into a spreadsheet.

There are reports that you will look at on a regular basis. Those are reports that you will save. There will also be public reports that can be edited by each user and saved to their own report file.

You can also create your own “**Dashboard**” where you have a series of reports that provide information that you need to be alerted to immediately and need to act on. Reporting is about finding problems, or making sure that work is adhering to plan – Planned Vs Actual planning is a large part of management. Examples are: “Where am I spending my money?” “Am I being efficient?” “What activities am I doing right now?” “To-Do Lists” “Last year Vs this year”

One rule of reporting is not to try to collect too much data – typically, you will want a report that *summarizes* data for you, for example, by road, by gang. Another way to get data is to *filter* it, for example, you only want to see a part of the data by gang or by district. To create a report, you use *facts* (miles, tons, measurements, names), and *dimensions* (by work order).

Types of reports are: Jasper (very specific format – a third party reporting software), Standard (tabular/columnar lists), Graph (pie, bar), GIS (looking at maps – looking at locations of work orders)

Charles demonstrated Agile’s reporting: can see a list of reports with check boxes for “Is public” and “On Dashboard”. It’s easy to add a report to the Dashboard by right-clicking and “Put on My Dashboard”.

Jasper reports will likely be created by report designers for you. These are reports that are more complex in design – not typically in just rows and columns but these are reports that might do calculations from data this is on the screen. Carmen provided an example of a “Tree Limb Cutting Report”.

WHAT TYPES OF REPORTS DO YOU WANT?

Send in examples and please specify the priority – need to see everyday, need to see every month?

See Table in Appendix 1

Discussion of what information is recorded and not recorded due to legal “fishing expeditions”.

Discussion of reimbursement reporting: SAP is likely to drive reporting by Project numbers. Agile will only have work order reporting costs. Other costs that are not related to a work order but are related to a disaster cannot

come from Agile. Agile contains the location information – it will be the only place to get location based information (**Key Decision 1**).

Labor costs will be contained in SAP. Reports that need labor costs will come from SAP.

Budget reports – are there any kinds of reports that you use for reporting budgets that you keep in Excel. (**Action item 9**)

FRICE – W (Forms, Reports, Interfaces, Conversions, Enhancements, Workflows)

Reports

1. Existing ZW Reports
2. Possibly ZT06, ZT33, ZT29, ZT27, ZT08 – out of SAP
3. Pre-scheduling Inspections Report
4. Printout of WO (See LA-SC-002)
5. Printout of WR (with WO s)
6. Reimbursement Report (Accident Report)
7. All DOTD - Check Table Reference Report (ZW05)
8. Overtime Sheet (need to add from/to time)
9. FEMA/FHWA reports
10. Budget Planned Vs Actual Reports (Items 1 – 10 Reports)

Interface

1. Contributions to BI (possible Interface)

Key Decisions

1. If FEMA/FHWA reimbursement reporting, comes from Agile, this will only contain work order based costs for the storm related project numbers and other costs will come from SAP
2. Work order based reports for FEMA/FHWA will come from Agile, unless location information is captured in SAP (**See action item 6**).

Integration Points

1. All aspects of Agile
2. Possibly BI
3. SAP (sends cost data at Day Card level)

Organizational Impact

1. New Reporting System to be learned (relatively similar to SAP but will require re-training)

Parking Lot

1. Carry forward all ZW reports
2. How will SAP handle FEMA/FHWA disaster projects – PS Module

Appendix 1: Report examples

REPORTS USED			
Type of report	Currently In	Source	Notes
Work Orders		ZW01 ISIS	
Overtime reports (HR)	Excel	Input from paper Daily Work Report	Bi-weekly; done after payroll is completed. Rhonda is setting up to be able to do from Z-WORD (data is in Z-WORD)
Equipment Report (WO)		Z-WORD	After payroll Check to make sure that no mistakes in ISIS number entry. Check to make sure no excessive hours. ZW02,
Materials Used (WO)		ZW03	
Attendance (hours) (HR)		ZT06 ISIS	**Reports from ISIS will stay with ISIS
Absence reports (HR)		ZT33 ISIS	ZT33 used for PPRs ZP136 – also a leave type of report
MOPS Daily Work Report/Number of complaints (Location)		MOPS HISTORICAL, otherwise ZW01	The attorneys will request this information (What complaints on a segment of road?) Cannot provide them the number of work orders very easily. Note that the dollar information is not given to them, but MOPS does provide. Currently Has to be done by each function – would like to do as control, mile marker. Queried by control section.
CostID (HR)		ZW08	This is payroll; is useful for cost IDs other than work orders
Reimbursement report (accident)/ Vandalism			
Inspection Reports			
Disaster Reports <ul style="list-style-type: none"> • Disaster equipment report (Costs) • Disaster material report (Costs) • Labor hours (rate/costs) • Materials (1 cost - average) 			FEMA/FHWA “Summary reports” ties info to backup doc <ul style="list-style-type: none"> • Equipment: Who operated, what work order is it tied to • Until Equipment Watch is approved, need to capture the rental rate and the operating rate • FEMA/FHWA reporting is on only on work order xactions • STORM FUNCTION NUMBERS • Sometimes a storm is not declared a disaster so a project number is not opened up for reimbursement.
“Disaster Labor Costs”		ZT29	Labor portion of disaster reporting. A bi-weekly payroll report

REPORTS REQUESTED			
Type of report	Currently In	Source	Notes
Equipment hours per year			Actually obtainable from ZW02. Inspection data will be collected in the fleet module of SAP (PM).
Performance Indicators Report			Activity codes that are tracked on a monthly basis.
Disaster reports			Would like a subtotal within a subtotals Would like to have a report that can report on a storm function numbers, but also do a subtotal of the project numbers
Missing information			Would like to have reports that show where information is missing.