

MTA Business Service Center 9.2 Upgrade Improvements

MTA Finance Committee
December 2016



Evolving priorities, consistent principles

Priorities

2011-2015	2016-2017
Stabilization	Employee and Vendor Portal
Transparency	Recruitment
Customer Service	Enabling Mobile
Accuracy and Standardization	Training
	Marketplace
	Pension Integration*

Principles: Standardization, Simplification & Savings



* Phase I for MNR, LIRR and Police defined benefit plans

New functionality added to high volume processes

Employee Portal

Each employee has access to a personalized view of:

- Paychecks: 26 to 53 checks/remittance per year
- Service Requests: Status of their tickets
- Benefit Plans: 4+ plans (medical, dental, vision, prescription)
- User Productivity Kits - Step-by-Step/Guided Training Knowledge
 - 1,724 Individual Kits across 37 Training Modules

Vendor Portal

Introducing self-service for bidders and suppliers

- Bid Events, Bid and PO Status, Categories and supplier details
- Suppliers: 7,496 Vendors, 13,491 Contacts
 - Registered To Date: in progress
- Bidders & Suppliers: 13,000
 - Registered To Date: in progress
- Vendor maintenance forms: 516 per month

Mobility

New functionality for the following transactions

- Receipts: 3,027 per month
- Approved Requisitions: 5,267 per month
- Plus, mobile access to personal details (Pay, Benefits)

Recruitment

Enhanced functionality for applicants and HR

- Job Postings: 219 per month
- Applicants: 47,227 per month
- New Hires: 488 per month

Functionally rich employee portal

The screenshot displays the My MTA Portal interface, which is a functionally rich employee portal. The main navigation bar includes sections for HR PAYROLL, FINANCE PROCUREMENT, METRICS DASHBOARD, AP WATERFALL, and IN QUEUE. A sidebar on the left provides quick access to various services: My Personal Information, My Benefits, My Time, My Pay, My Verification of Employment, My Tax Favored Programs, My Talent Management, My Learning, My Job Search, My BSC Applications, My Time Approvals, and My Work Schedule.

The main content area features several key sections:

- My Benefit Providers:** A table listing various benefit plans such as NYS Empire Plan - 001 (Medical), METLIFE Dental (Dental), EyeMed Vision (Vision), and NYSLRS (Pension).
- New Procurement Categories Are Here:** A notification stating that procurement categories will change as of November 21, 2016.
- My Service Request:** A section indicating "No Service Request Found."
- My Team Learning:** A table showing learning entries for Angel Barbosa, including courses like "Approving Requisition," "Approving POs," "Workplace Violence Prevention," "Siebel Upgrade," and "Sexual Harassment in the Workplace." The table includes columns for Name, Course, Reqd, Status, Due date, and Type/SubType.
- My Pay and Holiday Schedule:** A calendar view for December 2016, highlighting specific dates.
- My Worklist Alerts:** A notification indicating "You have 1 Worklist Alerts."
- Announcements:** A section for "Mandated Courses for 2016, available via My Learning ribbon."
- All BSC Forms:** A button to access all BSC forms.
- Reports List:** A section for viewing reports, currently showing "All".

On the right side of the portal, there are several navigation buttons: "Employees / Retirees Sign In" (orange), "Employment" (purple), "Contact the BSC" (blue), and "First-Time User Password Setup" (yellow). A footer banner reads "Partnering to deliver excellent service..." with a "Privacy Policy" link.

A portal for bidders and suppliers


Hello - a p | [mta info](#) | [Home](#) | [Sign Out](#)

My Sell Events

Events Personalize | Find | 1-5 of 5 | First | Last

Event Name
Defect Test 02
Defect Test 02
ESup03 Retest Defect 290
MTAHQ_RFP_SERVICES
MAINTAIN EVENTS USING A CONTACT

[See all of my events](#)

Quick Links

- [Bid Results](#)
- [Plan Holders List](#)
- [Early Payment Program](#)
- [View Events and Place Bids](#)
- [My Event Activity](#)
- [My Quote Groups](#)

My Events

Event ID	Due Date	Version#	Round#	Category
0000000039	2016-09-16	1	1	
0000000008	2016-08-29	1	1	
0000000080	2016-08-19	1	1	

[Show All Results](#)

Upcoming Shipments

PO BU	PO ID	PO Line	Item	Description	Qty	Due Date
LIRRD	4000082109	1	3081226b	connector,clasp, traction motor lead, 1100/24 cable, emd 8109922, power parts 1607 /sw1001, mp15ac/	9	2016-08-12
MTABC	2000161122	1	76-87-0033	radius rod lwr	41	2016-08-04
MNCRR	1000074139	1	45053538	bit hex shank 1/4 in. #2 phillips tip for drywall	1	2016-07-20

[Expand All](#)

My Buy Events

Events Personalize | Find | 1 of 1 | First | Last

Event Name	Status
Defect Test	Accepted

[See all of my events](#)

Bidder/Supplier Categories

- [.net Applications Consultant](#)
- [Artificial Intelligence](#)
- [BEARINGS](#)
- [BUILDING&CONSTRUCTION MATERIAL](#)
- [BUS SERVICES](#)

[View All](#) [Edit Quote Groups](#)

PO Acknowledgement Status

No Rows to Display



Informative recruitment pages show application status

My MTA Portal

Filter by

- Business Unit
 - MTA Headquarters (46)
 - New York City Transit (45)
 - Metro-North Railroad (28)
 - Long Island Rail Road (18)
 - MABSTOA (17)
 - Bridges and Tunnels (9)
 - MTA Bus Company (4)
 - MTA Capital Construction (3)
 - SIRTOA (3)
 - MTA Business Service Cent. (2)
 - Less...
- Department
 - No Value (24)
 - Off of Enterprise Applica... (5)
 - Office of IT Security (5)
 - Project Mgmt Detail (5)
 - Chief Officer Infrastruct. (4)
 - Human Resources (4)
 - Labor Relations (4)

175 matches found

Search Results

Assistant Manager-Project Controls - 87501
 Department: Project Mgmt Detail | Location: Queens | Business Unit: Long Island Rail Road | Posted Date: 01/12/16

Asst. Trans. Mgmt.
 Department: Capital

Computer Specialist
 Department: Revenue
 Posted Date: 09/12/15

My MTA Portal

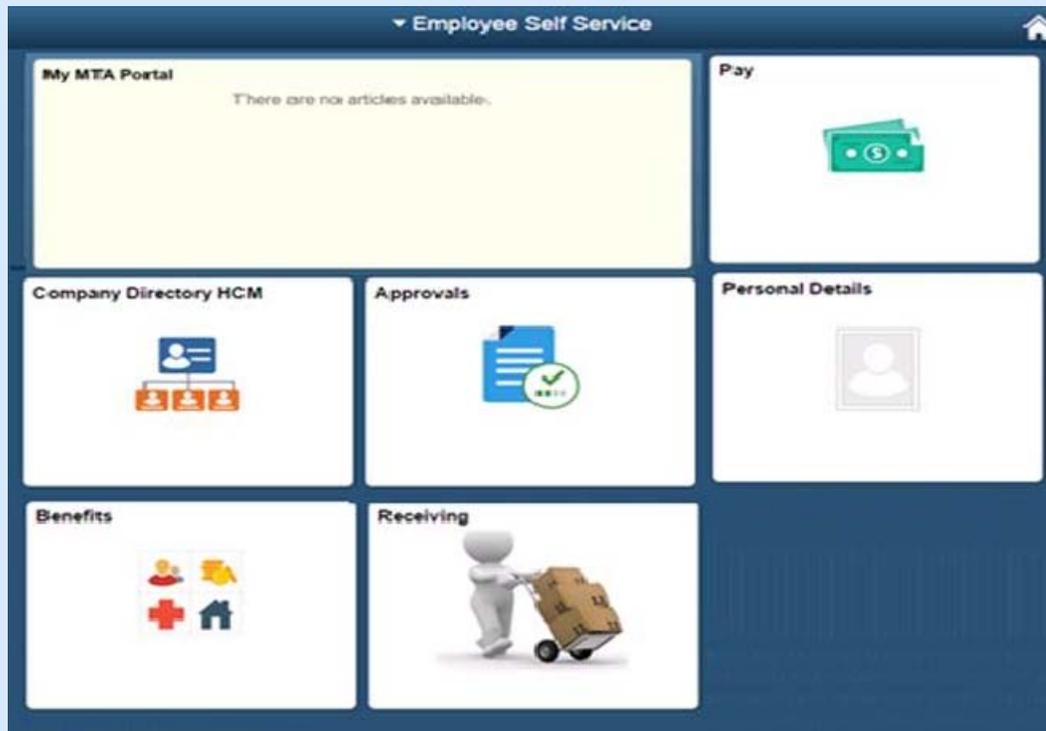
My Activities

Display applications from All Applications

Job Title	Job ID	Job Posting Status	Location	Status	Screening Results	Disposition Status	Date Created	Date Submitted	Date Withdrawn	Withdraw Application
Application Dev SpecialistLvl 3-6	87924	Open	34th St Station	Submitted		Applied	12/05/2016 3:54PM	12/05/2016 3:55PM		Withdraw
Supervisor-Communications	88178	Open	Engineering	Submitted		Applied	12/05/2016 3:51PM	12/05/2016 3:53PM		Withdraw
Asst Mgr IT Administration	88063	Open	2 Broadway	Submitted		Applied	12/01/2016 1:54PM	12/01/2016 1:55PM		Withdraw
HR Coordinator	86900	Open	2 Broadway	Not Submitted			07/20/2016 7:41AM			Withdraw
Dir Prgm Mgmt Office	81432	Closed	333 West 34th Street	Submitted		Applied	11/12/2014 2:10PM	11/12/2014 2:08PM		Withdraw
Sr Operations Analyst HRIS	74019	Closed	333 West 34th Street	Submitted		Position Filled	12/09/2011 4:00PM	12/09/2011 3:57PM		Withdraw
Facilities Sourcing Manager	85808	Closed	333 West 34th Street	Submitted		Applied	06/02/2016 3:56PM	06/02/2016 4:00PM		Withdraw
Manager Human Resources	85660	Closed	2 Broadway	Submitted			03/14/2016 8:04PM	03/14/2016 8:11PM		Withdraw
Application Developer 2	86148	Closed	420 Lexington Avenue	Not Submitted			04/20/2016 10:06AM			Withdraw
Manager - Staffing, Deployment and Support	81341	Closed	Randalls Island	Submitted			10/16/2014 7:09PM	10/16/2014 7:08PM		Withdraw
Deputy Director Payroll	85774	Closed	333 West 34th Street	Not Submitted			04/21/2016 3:11PM			Withdraw
Deputy Chief Procurement Officer -			333 West 34th				06/02/2016			Withdraw



Mobile devices facilitate common transactions



- Allows authorized employees to approve transactions while out of office
- Reduces phone calls
- Speeds up receipting and payment for delivered goods and services

Can eliminate delays in paying invoices



Improvements in training ensured that we benefit fully from new features

THE UPGRADE UPDATE
SEPTEMBER 2016

MTA PeopleSoft 9.2 Upgrade
Simplicity — Standardization — Savings

MESSAGE FROM THE PROJECT TEAM

GO LIVE NOV 21
Dear Colleagues, September activities changing for you (activities up to an Through our Agency Readiness Team hot topics such as training, workflow process changes. From now on we w "FAQ Sheet." The first one is attached. Look for answers to Workflow App PeopleSoft 9.2 Upgrade Project Manager FSCMComm@mtabc.org

UPKs ARE COMING VIA MY LEARNING ON OCTOBER 3

UPK
To get ready for Go-Live, end users will receive training via online Productivity Kits (UPKs). You will receive an email letting you know UPKs are available in ELM. UPKs have four different modes that support system transactions:

- SEE IT** Watch an animated demonstration of all steps in a process.
- DO IT** Click buttons to display step process and enter window displays each step.
- TRY IT** Follow prompts to take all the actions required to complete the steps in a process.
- PRINT IT** Print the step-by-step instructions to use the process.

CUTOVER: GRAYOUT AND BACKUP

WHAT PEOPLE WANT TO KNOW

Q. If I have a requisition that is "Approved"
Your requisition must reach "Approved" by November 16. If you created a requisition that goes live on November 21 and you are at the time of the Blackout, it will be canceled.

Q. How will I know if any of my requisitions are being canceled at the start of the blackout?
Procurement will provide the agency with a list of requisitions that are being canceled at the start of the blackout.

Q. What about transactions that are canceled?
Only the activities specified in the Agency Readiness Plan but not completed before the Blackout when the system goes live on November 21 will be canceled.

REMINDER ABOUT QUERIES & FAVORITES

Queries
Users with access to Query Manager should take a screenshot of tables, fields, or criteria for each query created from March 2016 until Go-Live, as these queries will need to be recreated within PeopleSoft 9.2. Using the "View SQL" tab may be helpful if you read SQL.

Favorites
If you have saved your frequently used PeopleSoft pages in Favorites, be sure to make a list before Go-Live. Favorites from 9.0 will not be converted - you will need to recreate them.

KEY PROJECT MILESTONES

- Grayout for new features
- End-User Training
- Instructor-Led Training
- UAT concludes
- Grayout for for

CONTACT AND INFORMATION

To see the Learning Spotlights and Agency Readiness presentations, visit the PeopleSoft 9.2 Upgrade website: www.mymta.info/bscproject/

Your Agency Readiness Team members are listed on the website. They are prepared to facilitate your readiness for Go-Live and ensure that your questions are answered. Please feel free to contact them.

What's on your mind? Contact us with your comments and questions: FSCMCommunications@mtabc.org

OCM ORGANIZATIONAL CHANGE MANAGEMENT

Training Delivery Method
Summary

UPK (User Productivity Kit)	WBT – Procurement ONLY (Web-Based - UPK Training)	ILT (Learning Labs)
<ul style="list-style-type: none"> Training that end users can complete on their own time; targeted for infrequent users of the procurement modules who may not enter the system on day 1 PeopleSoft transactional content to be available via the Oracle User Productivity Kit (UPK) before SIT testing begins in June 2016 	<ul style="list-style-type: none"> Business process-based courses with links to UPK delivered through a web-based platform targeted for frequent users of the procurement modules WBT courses expected to begin in September 2016 and end in October 2016 (WBT courses are expected to be completed by users before attending Learning Labs). In order to be completed prior to the November 2016 go-live 	<ul style="list-style-type: none"> Business process overviews and exercise-based guided workshops (by an instructor) where end users can put into practice knowledge acquired through WBT and SPL Learning Labs should be delivered no more than 5 weeks prior to the November 2016 go-live (4 is ideal)
Additional Considerations: <ul style="list-style-type: none"> The 6 courses to be delivered via WBT and LL to cover the end-to-end process of MTA procurement lifecycle are: <ol style="list-style-type: none"> Requisitioning Approving Requisitions Approving POs Transactional Procurement Source-to-Contract Collaboration 		The primary user groups are: <ul style="list-style-type: none"> Requesters Approvers (Req, and PO) Buyers (and Buyer Managers) Collaborators Suppliers CMC Casual Receiver

92% attendance rate achieved due to agency leadership

MTA Marketplace: Standardized Catalog Ordering

Agencies



Nov 2016 Release:

STAPLES

Future Releases:

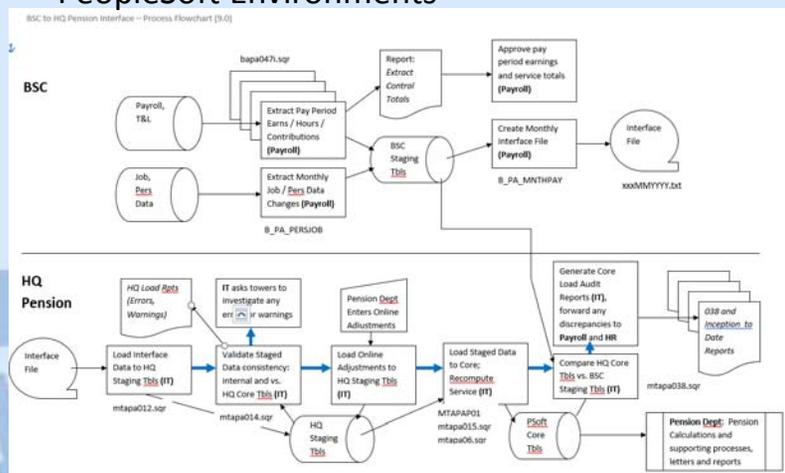


Supplier Catalogs

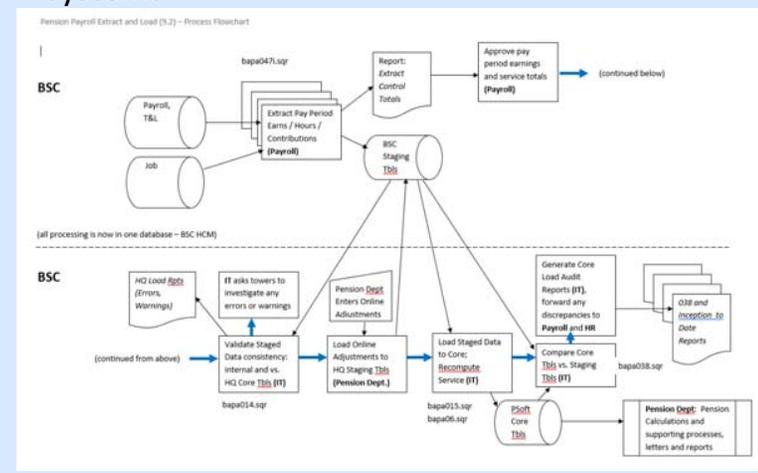
Integrating Pensions with BSC's PeopleSoft provides key benefits

- All data is now in one PeopleSoft 9.2 Environment
- Quality reports built according to Actuary's specs
- Automated COLA process
- System-based calculations for Bargaining Units covered under MOU's from 2007 through 2015 with ability to make updates for future collective bargaining
- Additional exception reporting to validate / reconcile data
- Increased Performance
- A foundation for adding new pension plans, e.g. Pension Phase II (MaBSTOA)

Before: Two completely separate PeopleSoft Environments



After: Data does not cross PeopleSoft systems



Benefits of Upgrading PeopleSoft

Simplicity

- New PeopleSoft easier to use, more intuitive
- Opportunity to correct “pain points”
- One source for information
- New “My MTA Portal” customized for each employee
- More self-service options

Standardization

- PeopleSoft built around industry best practices
- Now that shared services platform is proven, opportunity to leverage capabilities across all agencies
- One platform improves data quality and business analytics

Savings

- Removing customizations saves on upgrade costs
- Improved user productivity with new “work center” views
- Increased transparency allows more educated decision-making

Appendix



Upcoming people and process Improvements in 2017

- Expand Leadership and Project Management Skills at the BSC
- Analyze Capital Processes with an Eye Towards Simplification
- Travel and Expense Processing
- Benefit Claims Billing
- Expand Category Management strategy to capitalize on further savings
- Simplify Payroll Cycles
- Automate Onboarding and Benefit Enrollment
- Accounts Payable: Optical Form Recognition to Replace Manual Document Management



Systems initiatives in 2017

Continue Applying Updates

Strategy to ensure PS Platform remains up to date with latest releases to address Fit/Gaps, Customization Retrofits and Bug Fixes to sustain Oracle PeopleSoft support

Pension Phase II

Continues the consolidation of MTA Pension plans (MaBSTOA, SIRTOA, MTA Bus Plans and LIRR Closed) to the MTA BSC Human Capital Management / Pension Administration system.

Procure to Pay Phase II

Increase functionality within the Procure-to-Pay Supplier Relationship Management by implementing 4 additional modules:

1. Supplier Contract Management
2. eSettlements
3. Procure and Spend Analytics
4. Services Procurement

Reduced customization to lower maintenance costs

- 24% Customization Reduction for Human Capital Mgmt. (HCM) and Enterprise Learning Mgmt. (ELM)
- 36% Customization Reduction for Finance, Supply Chain Mgt. (FSCM) and Enterprise Performance Mgmt. Upgrade (EPM)

Allows the MTA to:

- **Maintain the highest level of Oracle production support**
- **Integrate and simplify processes across MTA Agencies**
- **Optimize use of IT resources**
- **Benefit from software Improvement**



BSC Generates Savings and Avoids Unnecessary Costs

BSC generates savings 3 ways:

- Streamlined and automated processes allowed for consolidation of personnel from the Agencies
 - \$14.3 million in recurring annual savings
- BSC performs functions that original plan assumed would stay at the Agencies
 - \$2.5 million in annual savings to the Agencies
- By consolidating various computer systems into just one PeopleSoft platform, the MTA saves by not having to periodically update and replace Agency legacy systems
 - \$84.5 million in savings every 5 years



Extended Services in Human Resources

- Employee Portal:
 - Consolidates external and internal portals
 - Provides managers a view of training completions, compensation
 - Personalized user experience for forms
 - New user self-service
 - New training tools
- Recruitment:
 - Provides better screening for hiring managers and current status for applicants
- Mobility
 - Displays Access to personal information, benefits & pay advice
- Integrated Pension*
 - Integrates earnings and service information



*Phase I of Pension the defined benefit plans was completed on 2/4/2016

Extended Services in Procurement

- Vendor Portal (Bidders and Suppliers):
Vendor access to information and procurements via self-service
- Strategic Sourcing (Internal Procurement):
Introduction of vendor rotation, vendor performance, all procurements electronic, creation of procurement standards
- MTA Marketplace (Internal Staff):
Common portal for standardized catalog ordering
- Vendor Rotation Functionality
- Vendor Performance Functionality
- Mobility:
On-the-go view of personal Info and processing of approvals and receipts
- Executive Dashboard:
Visualization of workload and resource capacity

