Department of Business and Financial Services:
Update Regarding the ORACLE Finance & Human Resource Management System Strategic Action

Loudoun County School Board Meeting

March 12, 2019
## LCPS Strategic Plan

### Topic: ORACLE Finance & Human Resource Management System

<table>
<thead>
<tr>
<th>STRATEGIC ACTION</th>
<th>PERFORMANCE MEASURE</th>
<th>DESIRED OUTCOME (TARGET)</th>
</tr>
</thead>
</table>
| By 2020, LCPS will complete implementation of ORACLE financial, human resources and payroll management systems to provide greater data access, resource management and increased transparency. | • Number of staff and vendors trained in ORACLE Financials  
• Number of staff trained in ORACLE Human Capital Management – human resources, benefits, time & attendance, and payroll modules  
• Increase the number of custom ORACLE Business Intelligence reports available  
• Develop a finance management dashboard or report with metrics surrounding ORACLE customer support  
• Addition of ancillary modules (Position Control, Hyperion Budget, and Online Vendor Solicitation)  
• Addition of new functionality (Laserfiche document management, Affordable Care Act, Transportation Time & Attendance) | FY16 Baseline  
Begin upgrade to Release 12.2.4 ORACLE Business Intelligence Enterprise Reporting (Financial and Procurement Systems Phase 1 & 3).  
FY17  
Finish upgrade to Release 12.2.4 ORACLE Business Intelligence Enterprise Reporting.  
FY18  
ORACLE Human Capital Management (Phase 2) go-live.  
100% implemented & rollout with Position Control.  
FY19  
Direction on Budget Planning and Online Vendor Solicitation.  
FY20  
100% operational. |

**Goal 3: Deliver effective and efficient support for student success.**
## Progress to Date  --  FY17

<table>
<thead>
<tr>
<th>Desired Outcome</th>
<th>Desired Outcome (Target)</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upgrade to ORACLE Financials Version 12.2.4</td>
<td>FY17</td>
<td>Met</td>
</tr>
<tr>
<td>Business Intelligence Enterprise Reporting</td>
<td>FY17</td>
<td>NA</td>
</tr>
</tbody>
</table>

**Performance Measures**

- Staff are trained, training sessions established for new employees, and ongoing refinement of training.

- ORACLE Business Intelligence reporting no longer supported and will be phased out December 2019. New reporting tool being rolled out.
### Progress to Date -- FY18

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<th>Desired Outcome</th>
<th>Desired Outcome (Target)</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORACLE Human Capital Management Phase 2 Go-Live</td>
<td>FY18</td>
<td>Met</td>
</tr>
<tr>
<td>100% Implemented &amp; rollout with Position Control</td>
<td>FY18</td>
<td>Met</td>
</tr>
</tbody>
</table>

**Performance Measures**

- ✔ Staff are trained, training sessions established for new employees, and ongoing refinement of training.
- ✔ Report with customer support metrics was developed and is utilized.
- ✔ Affordable Care Act reporting currently outsourced; reviewing ORACLE solution.
- ✔ Transportation Time & Attendance interface complete and in use.
- ✔ Position Control established.
# Current FY19

<table>
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<tr>
<th>Desired Outcome</th>
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<th>Status</th>
</tr>
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<tbody>
<tr>
<td>Direction on Budget Planning</td>
<td>FY19</td>
<td>On target to meet.</td>
</tr>
<tr>
<td>Direction on Online Vendor Solicitation</td>
<td>FY19</td>
<td>On target to meet.</td>
</tr>
</tbody>
</table>

**Performance Measures**

- ✓ Hyperion Budget module currently being reviewed.
- ✓ Online Vendor Solicitation module not efficient in entirety. Using components of module and 3rd party software for online solicitations and contract management.
Milestones

- Processed fiscal year end payroll accruals.
- Supported early hiring efforts by managing early release of positions within position control.
- Worked collaboratively with Human Resources and Talent Development to initiate new contract payments for FY19 positions.
- Rolled out online benefits open enrollment through employee self-service.
- Issued 16,454 W2s for calendar year 2018.
Next Steps

<table>
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<tr>
<th>Desired Outcome</th>
<th>Desired Outcome (Target)</th>
<th>Status</th>
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<tbody>
<tr>
<td>100% Operational</td>
<td>FY20</td>
<td>On target to meet.</td>
</tr>
</tbody>
</table>

- Two items under review before achieving 100%.
  - Hyperion Budget
  - Affordable Care Act Reporting
- Ongoing review of business practices and opportunities to leverage ORACLE functionality for efficiency and improvements.
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