

**City of Madison
Software Evaluation
Improvement Opportunities**

#	Type	Critical/ Unique Req	Description	Supporting Evidence	Interview/ Workshop	Impact (1=High, 2=Medium, 3=Low)	Complexity	Categories		
								Cost Reduction	Process Efficiency	Improved Management / Reporting
1	System Capability		Integration of Recruiting paperwork and information between all agencies: Allow Agency access to candidates in Applicant Logs	Currently Agency has no direct system access to applicant logs	Human Resources					
2	System Capability		Ability to track status of employee (forms completion, etc.) throughout hiring process		Human Resources					
3	System Capability	X	Ability for new hires and/or seasonal workers to begin completion of forms (Application, W2, Certifications) and paperwork electronically before first day/orientation (on boarding processes)		Human Resources					
4	System Capability		Ability to create Miscellaneous invoices for outside trainers for training classes		Human Resources					
5	Process/Workflow		Electronic requests for re-classification		Human Resources					
6	Process/Workflow		Notifications sent /communication to HR improved when budgeted positions are established and when new positions are created.	Currently manual	Human Resources					
7	System Capability		Integration and visibility of grievance status and paperwork between all agencies		Human Resources					
8	Reporting		Ability to track and report on types of EAP programs utilized and improvements/results		Human Resources					
9	System Capability		Visibility to all Agencies for Employee files related to corrective actions, discipline, and performance procedures		Human Resources					
10	System Capability	X	Web-Based Self Service functionality for Employee information changes		Human Resources					
11	System Capability		Employee Survey Tool for surveying employee opinions		Human Resources					
12	Process/Workflow		Workflow/Approval requirements with electronic signatures		Human Resources					
13	Reporting	X	Web based reporting - General system improvement requirement		Human Resources					
14	Technical	X	User Security - Ability to set who can view what information based on title and status		Human Resources					
15	Reporting	X	Dashboard functionality - General system improvement requirement		Human Resources					
16	Technical	X	Auditing capabilities - Change Log of User and Time/Date - General system improvement requirement		Human Resources					
17	Reporting	X	Importing and exporting data from all agencies		Human Resources					
18	Process/Workflow	X	Employee Requests to Fill and Employee Change Requests can be made at the Agency level and forwarded to HR electronically		Human Resources					
19	System Capability	X	Employee Data - Tracking and Reporting by: Union Participation, Residency, Seniority, Direct Supervisor, Hour Type, Class Specifications, Fair Labor Status (Exempt/Non-Exempt), Hour Indicator, Employee Disciplinary History, Accidents, Violations, Race (Self-Identification)	Multiple detailed reporting requirements	Human Resources					
20	Reporting	X	Org Chart Creation capability (based upon employee/supervisor relationships defined in data)		Human Resources					
21	Technical	X	Drivers license and Social Security Number validity check - Would need to integrate with external State/Federal systems		Human Resources					
22	Document Attachment	X	Employee file with photo image capability		Human Resources					
23	Reporting	X	Employee ID creation		Human Resources					
24	System Capability	X	Projection/Forecasting of future employee compensation/benefits costs by employee, along with hiring needs for setting budgets		Human Resources					
25	Process/Workflow	X	Electronically manage creation and approval workflow for Agency Personnel Action Form		Human Resources					
26	System Capability		Provide for electronic tracking and data associated with Exit Interview for employee terminations, retirement, voluntary leave		Human Resources					

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27	System Capability	X	Ability to process payroll on multiple time cycles (e.g. Bi-Weekly and Monthly)	Currently the City uses two payroll cycles and the system must be flexible to provide for this.	Payroll					
28	Process/Workflow		Improve ability to provide proper employee information electronically from HR to Payroll when employee file is established		Payroll					
29	System Capability		Ability of system to provide real time changes of employee data		Payroll					
30	System Capability		Ability to have multiple employee search criteria options: e.g. Maiden name, etc.		Payroll					
31	Process/Workflow		Ability to track and apply changes to classifications, new laws, new regulations so that system accurately reflects current standards.		Payroll					
32	Technical		The use of user defined fields with multiple characters allowed and clear descriptions of codes		Payroll					
33	System Capability		Expanded leave calendar 1) Multiple leave types (FMLA, Vacation, Workers Comp, etc.) 2) Reflects the benefits applied/incorporated		Payroll					
34	Reporting		Track/report on employee by 52 week moving period for: Sick Usage, Gross Wages, Hours Worked		Payroll					
35	System Capability		Improve formal electronic tracking of leave within system		Payroll					
36	Reporting		Employee reports with totals: FT, PT, Premium Paid, all pay types, pay rules, workers comp, etc.		Payroll					
37	Process/Workflow		Electronic approvals: Time, Forms, Process/workflows		Payroll					
38	Reporting		FMLA - Family Medical leave tracking and reporting		Payroll					
39	Process/Workflow		Workers Compensation process to be improved. More automated and easier integration between City and 3rd Party Administrator in determining final payments.	Due to current labor contracts, there is some manual manipulation required prior to final processing of Workers Comp payments.	Payroll					
40	System Capability		Ability to continue paying employees after termination		Payroll					
41	Reporting		Employee reports with total hours worked and the dollars associated with them		Payroll					
42	System Capability	X	Improve ability to tie Comp time / Overtime to be attached to a specific GL account #		Payroll					
43	Reporting		Calculate cash value of compensation and benefits for each employee		Payroll					
44	Reporting		Payroll to be able to automatically calculate Retro Pay		Payroll					
45	System Capability	X	Ability to pay employee for 2 different jobs/ 2 different rates		Payroll					
46	System Capability	X	Ability to convert a temporary/hourly employee to a permanent employee		Payroll					
47	Reporting		Clear and understandable pay stub/check and ability to print duplicate		Payroll					
48	System Capability		Employee Scheduling software capability for most departments/agencies	Needs further review, as specifically noted for File, Police, Streets	Payroll					
49	System Capability		Attendance tracking		Payroll					
50	Reporting		Reporting - Improve ability to Calculate FLSA Overtime		Payroll					
51	System Capability	X	Ability to calculate Premium Pay	Extensive City Rules and Labor Contracts needs further definition	Payroll					
52	Technical	X	Provide for Data Integration or capabilities of Tele-Staff	Police - Scheduling and Hours tracking system	Payroll					
53	Technical	X	Provide for Data Integration or capabilities of Fire Agency's Access-SQL Server system	Fire	Payroll					

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54	Reporting	X	Detailed totals on employee summaries for reporting (OT paid, etc.)	Water Utility	Payroll					
55	Reporting	X	Improve annual reporting for Retirement System (need to note active employees, dollars, hours)	Note differing rules for calculation of payroll dollars/hours	Payroll					
56	Technical	X	Improve data integration with Retiree Life Insurance Billing System or Incorporate these requirements into new ERP system	Central Payroll	Payroll					
57	System Capability	X	Ability to perform payroll adjustments after employee returns from leave	Central Payroll	Payroll					
58	Process/Workflow	X	Improve ability to support electronic Payroll entry processes (various methods) by level and employee type AND allow for supervisor approval through workflow process		Payroll					
59	Technical		Minimal access to confidential data (SSN)		Payroll					
60	Technical		User Security - Ability to setup user profiles allowing and preventing access		Payroll					
61	Technical		Auditing capabilities		Payroll					
62	Reporting	X	Quarterly reporting of employee information to State (e.g. Unemployment)		Payroll					
63	Reporting	X	Improve ability to run Reports to include multiple years or user defined time span		Payroll					
64	Reporting	X	Sort capability by Payroll code – ad hoc/user level		Payroll					
65	Reporting	X	New hire data reporting		Payroll					
66	Reporting	X	941 Report		Payroll					
67	System Capability		Ability to know whether automatic renewal of a contract is allowed; Tracking of renewal date/type in the contract management database.		Procurement					
68	Reporting		Ability to modify procurement forms/templates from the system	Need to modify address info, Terms & Conditions and other data depending on the contract	Procurement					
69	Technical		Ability to email "link" to a transaction within the system (e.g. send electronic link to a specific PO)	Interest in completing this activity completely within the system vs. exporting data and sending as an attachment to stand alone email	Procurement					
70	Reporting		Configurable reporting on spend	Interest in reporting spend various criteria, e.g., vendor, commodity type, etc.	Procurement					
71	System Capability		Ability to identify whether a purchase is sole source		Procurement					
72	Process/Workflow		Incorporate the Limited Purchase Order process into the overall PO process	Currently there is no direct keying of LPO information into the system, and LPOs are not encumbered	Procurement					
73	Process/Workflow		Configurable workflow for purchase approval	e.g. configure by position, dollar value of purchase, etc.	Procurement					
74	System Capability		System inquiry allowing a requestor/buyer to look up the status of purchase		Procurement					
75	Process/Workflow		Workflow for payment approval	e.g. procurement card payment approval	Procurement					
76	Process/Workflow		Workflow functionality that provides task or milestone notifications for contracts		Procurement					
77	System Capability		Ability to verify budget authority by the budget element/level required	e.g. may not need to verify authority by individual object code, rather a "parent" level of the budget	Procurement					
78	System Capability		Ability to automate bid notifications to select vendors		Procurement					
79	System Capability	X	Cross-agency ability to view City contracts and Purchase Orders (with necessary security)	Currently there is no central contract database and limited access to see PO's from other departments	Procurement					
80	Process/Workflow	X	Improve ability to track Federal/State/Local funding to transactions during procurement to ensure relevant legal criteria are met - Vendor Setup or Purchase Order?	Civil Rights accountability	Procurement					

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81	System Capability	X	Maintain necessary history of purchase transactions	e.g. Metro maintains 5-7 years	Procurement					
82	Reporting	X	Data downloading flexibility		Procurement					
83	Reporting	X	Automated and configurable reporting functionality		Procurement					
84	Process/Workflow		Standard contract format cross-agency		Procurement					
85	Process/Workflow		Ability to verify budget availability and provide automated notification to agency of insufficient funds prior to AP Vouchering	e.g. prior to payment of invoice	Procurement (AP)					
86	System Capability		Better integration of P-Card data with the new system	Using JP Morgan for P-Card data download	Procurement (AP)					
87	Process/Workflow		Ability to view P-Card purchases more timely	Currently can be up to 2 week lag in viewing transactions in SXD (note that there is more up to date access thru JP Morgan website). Consider more frequent downloads.	Procurement (AP)					
88	System Capability	X	Improve ability for end users to enter P-Card transaction detail into the system (may need to be web-based for Library)	Web necessary due to library connectivity issues	Procurement (AP)					
89	Process/Workflow		Business rule to identify dollar threshold at which a vendor plan is required	Civil Rights accountability - \$25k currently?	Procurement (AP)					
90	Process/Workflow		Ability to track in Vendor master for Civil Rights and AP to know whether a Vendor plan is on file	Civil Rights accountability	Procurement (AP)					
91	System Capability		Identification of fixed asset at time of procurement		Procurement (AP)					
92	Reporting	X	Configurable reporting on payments	e.g., ability to query by vendor, fund, agency, contracts, etc.	Procurement (AP)					
93	Process/Workflow	X	Verification of legal requirements prior to payment	Civil Rights accountability	Procurement (AP)					
94	System Capability	X	Complete recognition of credits	Currently, credits to a contract do not reflected in the encumbered value in the system	Procurement (AP)					
95	System Capability	X	Inquiry access to chart of accounts/string master at agency level		Procurement (AP)					
96	Process/Workflow	X	Automated trigger to prepare a change order when an invoice is greater than the purchase amount on record		Procurement (AP)					
97	System Capability	X	AP drill down access to purchasing documents/records		Procurement (AP)					
98	Reporting	X	Ability to track and report on retainage by contract		Procurement (AP)					
99	Technical	X	Interoperability between systems/open source	Library will continue to operate separate system; however integration between the system and the ERP will be necessary as well	Procurement (AP)					
100	Reporting		Enhanced drill down/inquiry/look capability	e.g., for journal vouchers	GL/Financial Reporting (GL)					
101	System Capability		Various period closes	e.g., ability to have a hard close for a period by agency	GL/Financial Reporting (GL)					
102	Document Attachment		Document attachment functionality		GL/Financial Reporting (GL)					
103	Reporting		Ability to print financial statements in the format needed for presentation		GL/Financial Reporting (GL)					
104	Reporting		Downloads in user-friendly, electronic format		GL/Financial Reporting (GL)					
105	System Capability		More robust cost allocation abilities	e.g., the ability to "reach into" other modules for financial and other data (e.g. assets, number of employees, etc.)	GL/Financial Reporting (GL)					
106	Process/Workflow		Workflow approvals to reduce paper/manual processing	e.g. for journal vouchers, billing authorizations, deposits, etc.	GL/Financial Reporting (GL)					
107	Reporting		Drag and drop-type functionality for ad hoc reporting		GL/Financial Reporting (GL)					

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108	System Capability	X	Ability to see cross-agency transactions		GL/Financial Reporting (GL)					
109	Reporting	X	Ability to track and report by different date ranges for grants		GL/Financial Reporting (GL)					
110	Reporting	X	Ability to accommodate financial statement reporting in multiple formats	e.g. GAAP and PSC regulatory formats such as that required for Water Utility	GL/Financial Reporting (GL)					
111	Reporting		Robust reporting for Asset Management		GL/Financial Reporting (Asset)					
112	System Capability		Ability to link funding source(s) to assets	e.g. for grants	GL/Financial Reporting (Asset)					
113	System Capability		Parent-child relationship management for assets		GL/Financial Reporting (Asset)					
114	Process/Workflow		Workflow improvements in Asset Management area (procurement through disposal)		GL/Financial Reporting (Asset)					
115	System Capability		Depreciation to the grant level and by function	Currently an offline Access DB	GL/Financial Reporting (Asset)					
116	Document Attachment		Robust attachment capabilities for asset records	e.g. ability to include a photograph of the asset	GL/Financial Reporting (Asset)					
117	System Capability		Transparency of records regarding assets when multiple agencies have a relationship with the asset		GL/Financial Reporting (Asset)					
118	System Capability		Inclusion of replacement value for individual assets	vs. just historical cost (for risk management purposes)	GL/Financial Reporting (Asset)					
119	Reporting		Reporting functions for facilitating physical inventory (Report of on-hand inventory or assets)		GL/Financial Reporting (Asset)					
120	System Capability	X	Ability to make adjustments for assets		GL/Financial Reporting (Asset)					
121	System Capability	X	Pre-population of procurement transaction detail in asset records for fixed assets		GL/Financial Reporting (Asset)					
122	Reporting	X	Filters to report on assets by appropriate project, grant, etc.		GL/Financial Reporting (Asset)					
123	System Capability	X	Integrated cash receipting enterprise-wide		GL/Financial Reporting					
124	System Capability	X	Inclusion of a debt module with ability to allocate debt to capital projects		GL/Financial Reporting					
125	System Capability	X	More seamless integration with bank systems	Currently manual	GL/Financial Reporting					
126	Document Attachment		Need the ability to attach documents and link to other source information when analyzing and reporting grant data		GL/Financial Reporting (Grants)					
127	Technical		Need to maintain an audit trail of the history of individual grant activity		GL/Financial Reporting (Grants)					
128	System Capability		Need grant tracking ability and the ability to assign related grant information (including specific grant numbers) as well as report on all of this information within the system	Tracking of most detailed Grant related information is done manually or via Excel today.	GL/Financial Reporting (Grants)					
129	System Capability		Need the ability to incorporate the performance period in grant data (i.e. to acknowledge the grant life when different from the fiscal or calendar year)		GL/Financial Reporting (Grants)					
130	Reporting		Need robust grant reporting functionalities for financial and program information		GL/Financial Reporting (Grants)					
131	System Capability	X	Ability to support recurring invoice processing (related to contracts) within the system		GL/Financial Reporting (Misc)					
132	Process/Workflow		Incorporate process workflow for approvals for Interdepartmental Billings		GL/Financial Reporting (Misc)					
133	Process/Workflow		Desire to automate invoicing for elevator inspections	~1700 invoices/year	GL/Financial Reporting (Misc)					
134	Process/Workflow		Incorporate process workflow for billings of miscellaneous Agency billings. Agency would key in billing data/authorization, then approved by A/R and invoice processed.		GL/Financial Reporting (Misc)					
135	Process/Workflow		Budget controls to automate notification of exhausted funds and necessary date parameters		Budget					

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136	System Capability		Ability to produce Proforma and "what if" scenarios enterprise-wide		Budget					
137	Reporting		User-friendly and flexible report writer	e.g. pivot-table like functionality	Budget					
138	Reporting		Ability to report information in different formats	e.g. when budget data need to be reported differently to different agencies	Budget					
139	Reporting		Ability to incorporate fund balance into budget reporting		Budget					
140	System Capability		Ability to show carry-over funds in budget		Budget					
141	Reporting		Consider changes to the budget format currently presented	Discussed fact that City stakeholders should not expect the Budget document to look exactly the same as current	Budget					
142	Training		Budget system tutorial to assist in managing staff turnover/learning curve	e.g. documentation, on-line help features	Budget					
143	Document Attachment		Ability to attach documents in new ERP system		Budget					
144	Document Attachment		Integration between new ERP system and current document management system		Budget					
145	System Capability		Functionality to note/comment in the system why budget changes were made through budget iterations	e.g. for internal use/reference	Budget					
146	Reporting		Incorporate performance metrics into budget process		Budget					
147	System Capability		System integration to pre-populate/retrieve budget input data: positions, actuals, projections, functional area data	to avoid printing and re-entry of this information as is done currently	Budget					
148	Reporting		Consistent classifications and level of detail between budget and GL		Budget					
149	System Capability		Ability to easily extract system information into tools like Excel and Access		Budget					
150	System Capability		Ability to import budget related data into system from Excel for complex budget development		Budget					
151	System Capability		Ability to project salary and benefits for individual employees and aggregate the projections by agency		Budget					
152	System Capability		Ability to capture actual salary and benefit data for individual employees and aggregate the actuals by agency		Budget					
153	Reporting		Ability to produce and print one comprehensive budget document	Currently it is necessary to produce and print the budget document in multiple sections comprising 40+	Budget					
154	Technical		Robust query ability	e.g. to easily query enterprise-wide travel expenditures for a period	Budget					
155	Technical		Improved audit trail of changes to budget iterations and identify the change author and date	e.g. Identify the changes and change author from request stage, to Executive budget , through adoption and amendments	Budget					
156	Process/Workflow	X	Integrate with County budgeting process for Health	Unique need for Health Department	Budget					
157	Reporting	X	Improved ease of gathering information needed for single audit		Budget					
158	Process/Workflow	X	Workflow integration between Budget and HR to ensure authorization for new positions	Currently a manual communication process	Budget					
159	System Capability	X	Provide capability to input investment data for revenue projections into the budget process		Budget					
160	Process/Workflow	X	Operationalize the budget	e.g. Linkage with ordinance changes to determine budget impacts	Budget					
161	Reporting	X	Ability to do federal reporting	Need further detail	Budget					
162	Reporting	X	Ability to produce a separate budget for each fund	Currently there are approximately 200 funds	Budget					
163	System Capability	X	Ability to project revenues: loan repayment, TIF, etc and 5-year fund condition with "what if" modeling functionality		Budget					

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164	System Capability	X	Budget module in ERP which supports collaborative budget development and review from many users		Budget					
165	System Capability	X	HR ability to integrate Position Tracking for budgeting purposes		Budget					
166	System Capability	X	Ability to support multiple budget types (or ID's) in the system for analysis and projections		Budget					
167	System Capability		User-defined fields for employee and payroll data that may not be standardized across City agencies	Specific employee data elements are needed for transit, e.g. seniority ranking, which affects how scheduling occurs. Currently accommodated through Access/Excel database.	Utilities - Transit					
168	Process/Workflow		Consider financial hard close on monthly basis to prevent posting to a prior closed period	Transit has challenge to close a month due to late posting of items such as interdepartmental billings, Dane County postage and printing charges, and utility charges	Utilities - Transit					
169	System Capability		Record of detailed procurement data from P-card purchases prior to receipt of the P-Card statement	Transit currently maintains a separate database of P-Card purchases to document the specific details of P-Card purchases because there is	Utilities - Transit					
170	System Capability		Identification of individual funding sources for grant-related purchases that are fixed assets		Utilities - Transit					
171	System Capability		Improve processes and supporting Self-service for customers for inventory management of Metro Cards for "outlet" sales	Desire to grant outlet retailers (~96 outlets) of transit tickets controlled access to the system to manage their ticket inventories	Utilities - Transit					
172	Reporting		Real time leave/vacation balance data available to employees	Employees not have access to the balance as of the last payroll check only (additional leave may have been used in the interim)	Utilities - Transit					
173	System Capability	X	Self-service employee time entry that accommodates complex work/payroll rules and links to scheduling tools	Transit drivers have complex union contracts, with payroll impacts based on scheduling; this information is currently tracked in a separate database by Transit.	Utilities - Transit					
174	Reporting	X	Transit uses methods to allow accrual of vacation time. Other departments may grant vacation time in lump sum at beginning of the year. System should be flexible to accommodate both methods.	Transit employees accrue vacation time; therefore, it is necessary to access real time data when allocating leaves for the coming year.	Utilities - Transit					
175	Reporting		Ad hoc reporting with relational tables and real time data		Utilities - Transit					
176	Reporting		Provide improved ability for annual Vacation Pick process through reporting or other system enabled processes	Currently manual process	Utilities - Transit					
177	Technical		Improved integration through a common ERP system to allow the City access to ledger and financial activity for Water Utility	City does not currently have direct access as a separate general ledger is used by the Water	Utilities - Water/Storm/Sewer					
178	Reporting		Ability to produce financial statements which meet PSC reporting needs		Utilities - Water/Storm/Sewer					
179	Technical	X	Seamless integration between Utility Billing and GL	currently the data are shared through a manual upload	Utilities - Water/Storm/Sewer					
180	Technical		Integration between job costing and payroll	Currently duplicate time entries are required - one to support Job Cost data, another for Payroll (Accela vs. ERP)	Utilities - Water/Storm/Sewer					
181	Technical		Integration with Accela and GL - potentially for inventory management	Unsure how Accela will be utilized for general inventory management functions vs. ERP	Utilities - Water/Storm/Sewer					
182	Reporting		Consolidated financial reporting to eliminate manual JV's through GL currently		Utilities - Water/Storm/Sewer					
183	Reporting	X	Accommodate PSC reporting needs through chart of accounts string		Utilities - Water/Storm/Sewer					
184	System Capability	X	Flexibility in calculating depreciation: by asset class, different methods, individual assets		Utilities - Water/Storm/Sewer					
185	System Capability	X	Capability for the Utility billing software to accommodate both premise-based (current regulation which allows assignment to tax bill) and customer-based (future?)	Only applies if Utility Billing software functionality is in scope; Currently handled by CIS Infinity	Utilities - Water/Storm/Sewer					

Improvement Opportunities
Definitions of High / Medium / Low

Business Impact (Net Benefit / Cost Savings)

High	- Drives significant bottom line improvement
Medium	- Some bottom line improvement
Low	- Little to no bottom line improvement

Complexity of Implementation

	Process	People	Technology
High	- Significant process redesign required - Significant capital investments required	- Cultural change from the status quo - Additional resources to manage initiative change may be required - Significant training requirements for production staff	- Significant system modifications/interfaces required
Medium	- Some process redesign required - Some capital investments may be required	- Additional cross training required - Additional training requirements for production staff required	- Some system modifications required
Low	- Minimal process redesign required	- Some realignment of current resources may be required	- Use of manual systems / desktop software only