MTA Business Service Center
9.2 Upgrade Improvements

MTA Finance Committee
December 2016
Evolving priorities, consistent principles

**Priorities**

<table>
<thead>
<tr>
<th>2011-2015</th>
<th>2016-2017</th>
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<tbody>
<tr>
<td>Stabilization</td>
<td>Employee and Vendor Portal</td>
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<td>Transparency</td>
<td>Recruitment</td>
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<td>Customer Service</td>
<td>Enabling Mobile</td>
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<td>Accuracy and Standardization</td>
<td>Training</td>
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<td>Marketplace</td>
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<td>Pension Integration*</td>
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**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:

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

**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
A portal for bidders and suppliers
Informative recruitment pages show application status
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.

92% attendance rate achieved due to agency leadership.
MTA Marketplace: Standardized Catalog Ordering

Agencies

MTA HQ  NYCT  MNR  LIRR  B&T  MTA BUS  SIRTOA

ERP

PeopleSoft

My MTA Marketplace

Nov 2016 Release:

Future Releases: STAPLES  CDW  GRAINGER  DELL  HP  VERIZON

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
<table>
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<tr>
<th>Systems initiatives in 2017</th>
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<tr>
<td><strong>Continue Applying Updates</strong></td>
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<td>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</td>
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<td><strong>Pension Phase II</strong></td>
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<td>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.</td>
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<td><strong>Procure to Pay Phase II</strong></td>
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| 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 Mgmt. (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