Budget, Finance & Human Capital Management Business Leadership Council

February 24, 2020

Welcome

Agenda

- Purpose and Background

- Rollout 1 Update

- Rollout 2 Human Capital Management Overview

- Labor Distribution Process

- Next Steps

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# Business Leadership Council (BLC) Purpose

- Review decisions, issues and system modification that arise from the EDGE Project Team

- Provide input to the EDGE Project Team from your respective department

- Provide details/clarification regarding department specific legacy systems

- Bring issues or concerns to the EDGE Project Team

- Contribute to the resolution of issues or concerns

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Our World Today
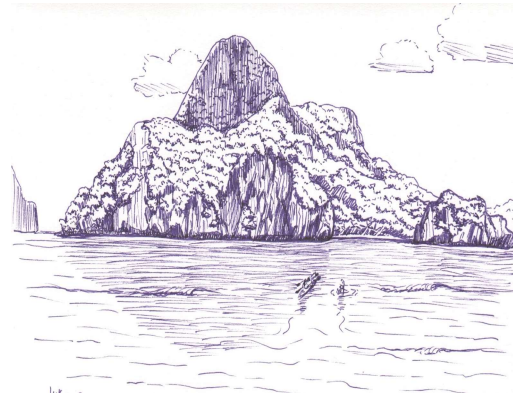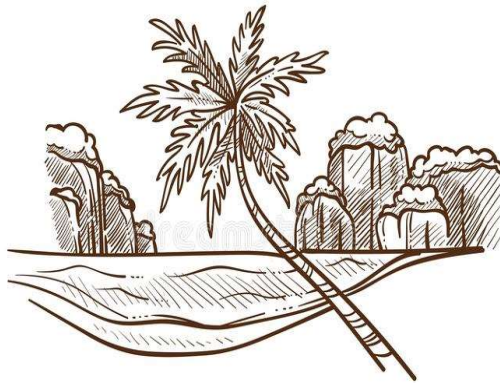
FINANCE

BUDGET

PROCUREMENT

HR/Payroll

MIAMI-DADE COUNTY
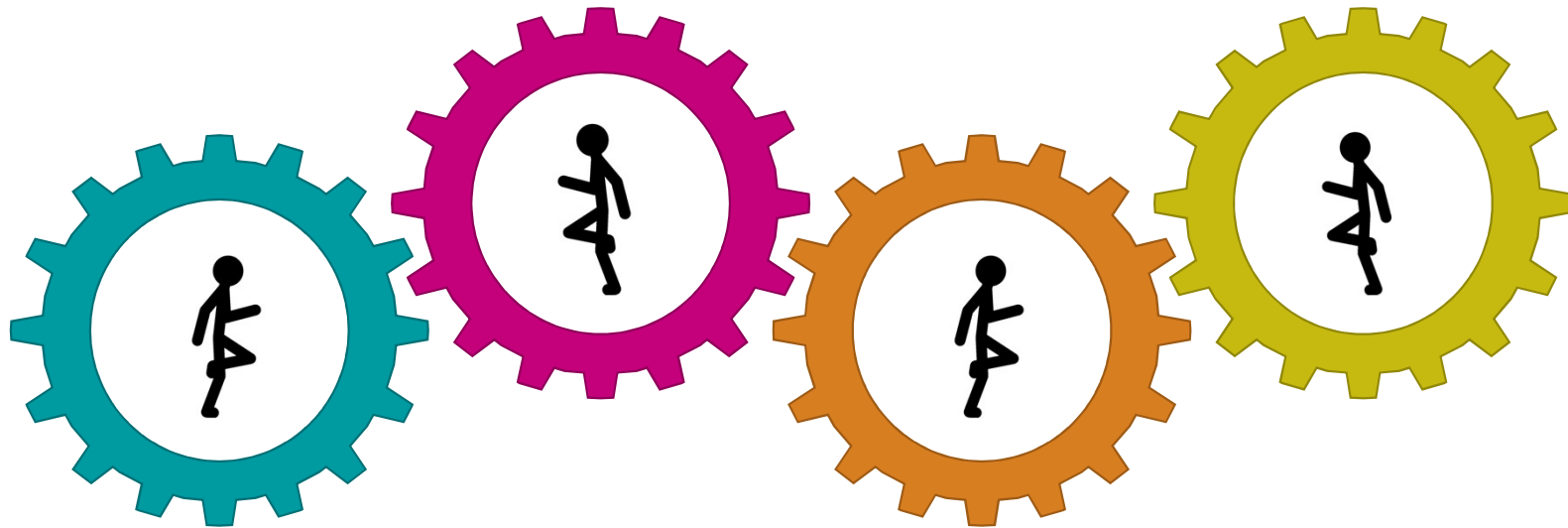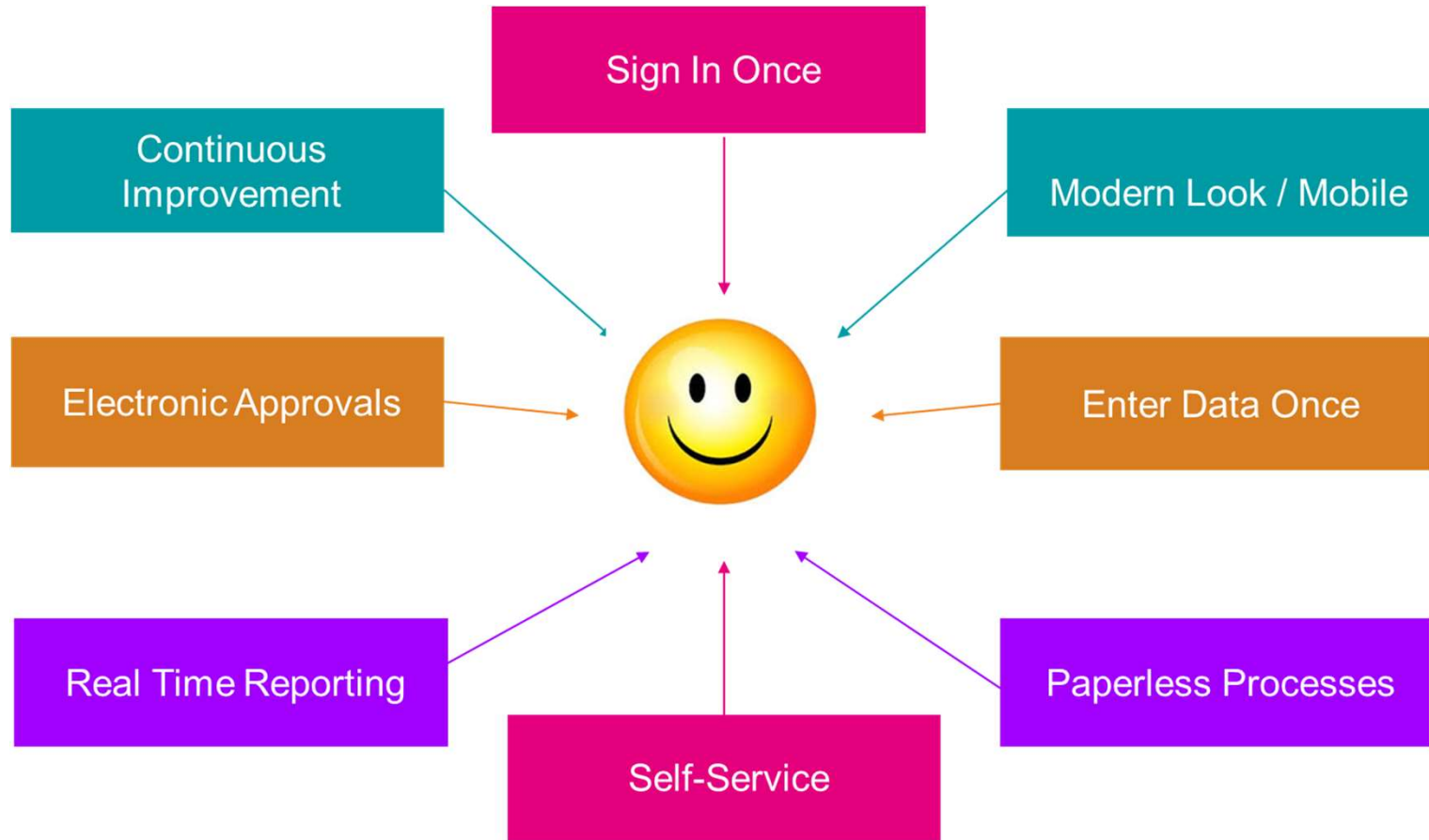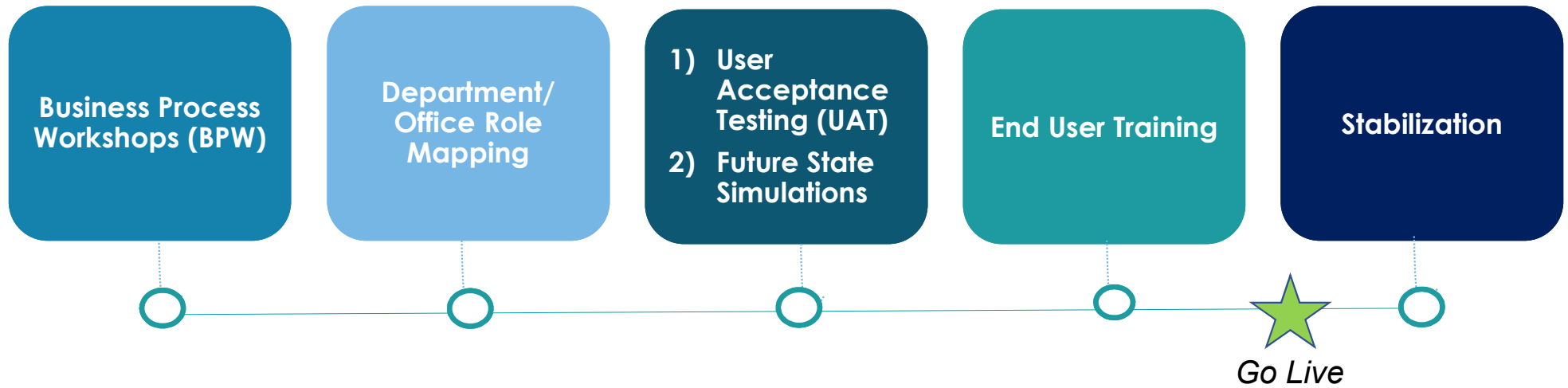
Your World Tomorrow…

Budget, Finance, Supply Chain Management, and Human Capital Management working together to help support the integrated ERP system

ERP Benefits

Sign In Once

Continuous Improvement

Modern Look / Mobile

Electronic Approvals

Enter Data Once

Real Time Reporting

Self-Service

Paperless Processes

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Department Monthly Time Commitment

| Business Process Workshops (BPW) | Department/ Office Role Mapping | 1) User Acceptance Testing (UAT) 2) Future State Simulations | End User Training | Stabilization |

Go Live

Rollout 1 FIN/ SC	March 2020	April 2020	May – July 2020	August - October 2020	October – December 2020
Rollout 2 HR	June 2020	July 2020	August – October 2020	November 2020 – January 2021	January – March 2021
Resource Duration	40 – 55 hours per Month	40 – 72 hours per month	40 – 80 hours per month	24 – 80 hours per month	

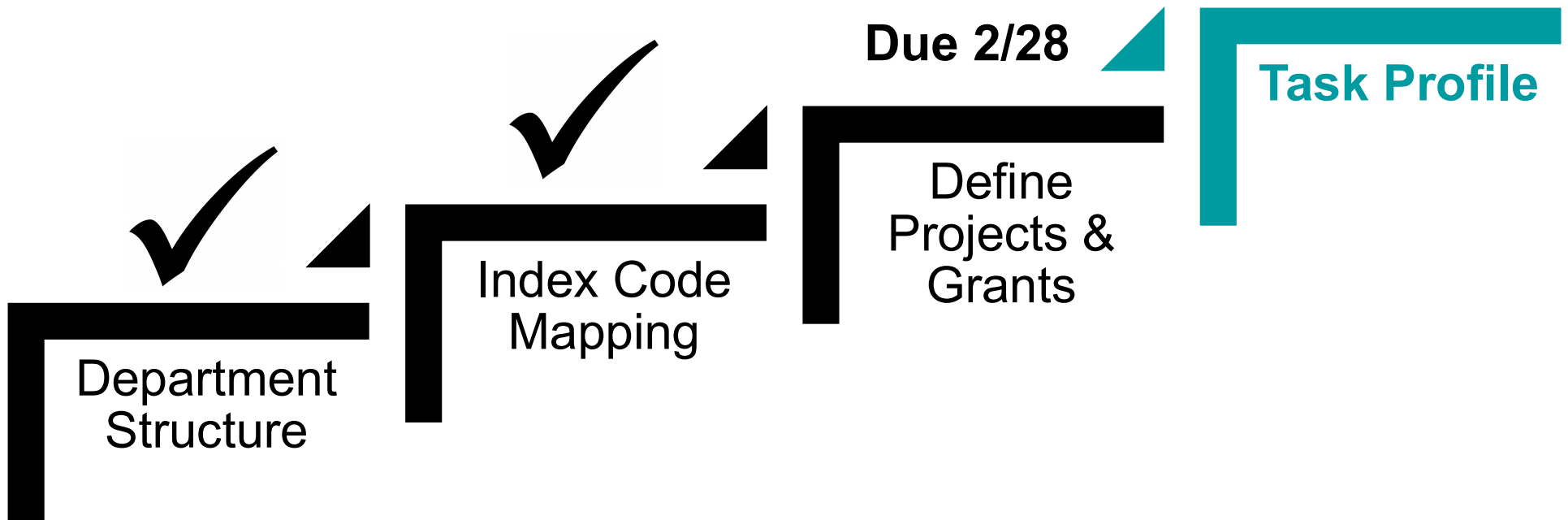*Note: Hours are monthly estimates and may vary based on department/office size and complexity*

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Where We Are as a Project

Department Structure ✓

Index Code Mapping ✓

Due 2/28

Define Projects & Grants

Task Profile

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Chart of Account Today vs Tomorrow

FAMIS COA	BAT	RFRO	MDC PeopleSoft COA	PeopleSoft Element
			One GL Business Unit (GL BU)	Chart Field
Fund Structure (Fund Type/Fund/Subfund)	Sub Fund	Sub Fund	Fund	Chart Field (self-balancing)
Organization	Entity		Department	Chart Field
		Budget Activities/ Strategic Area	Trees based on Department	Tree
Project	Activity/Program		Depends on Project Use	Chart Field
Grant	Project/ Grant		Grant	Chart Field (self-balancing)
GL, Sub Object Code	Sub Object	Accountability Ordinance	Account	Chart Field
Function			For Expenses, the Department Attribute For Revenues, the Account	Tree
Program (Budget Reporting)			Not Used	
Subsidiary			Other PS module, Account	Chart Field
User Code			TBD – Continually working with Parks	Depends on the research
Index Code	Entity		Depends on the meaning of the Index Code in FAMIS	Depends on the meaning

Chart of Account Today vs Tomorrow

A sample operating expense Index Code for FINANCE:

FAMIS Terms	FAMIS Values	PEOPLESOFT Term	PEOPLESOFT Values
INDEX CODE:	$ PRETAM448419	N/A	
FUND TYPE:	GF	TREE	
FUND:	040	TREE	
SUBFUND:	001	FUND CHARTFIELD	G4001
FUNCTION:	572	DEPARTMENT ATTRIBUTE	
PROGRAM:	CRPR070310010011	N/A	
ORGANIZATION:	PR44441410	DEPARTMENT CHARTFIELD	PR25030000
PROJ PJDTL:		FUND or PROJECT or NOT CONVERTED	
GRANT GR DTL:		GRANT CHARTFIELD	NO_GRANT
N/A	N/A	Project	PRTAMIAMIPARK
N/A	N/A	Activity	SECURITY

Rollout 2: Human Capital Management

Rollout 2 Modules

- **Absence Management** – Automates absence eligibility processing and enables self-service requests and approvals.

- **Benefits** – Automates eligibility checking and respond to Human Resource or qualifying life events that might affect benefits enrollment, based on eligibility and event rules.

- **Core HR** – Provides the foundation for your human resource management system. The data entered in the Administer Workforce business process is available to all the Human Resources business processes as well as the other applications in the PeopleSoft HCM suite.

- **ePerformance*** – Self-service application used to evaluate an employee's performance and update the employee's person profile.

- **Payroll** – Provides the tools to calculate earnings, taxes, and deductions efficiently; maintain balances; report payroll data and integrates with Finance

- **Talent Acquisition Management*** – A complete, integrated system that enables organizations to effectively manage workforce acquisition across all employment categories

- **Time and Labor*** – Facilitates the management, planning, reporting, and approving of time, and calendar and schedule creation and usage, from one global web-based application.

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Rollout 2 Key Changes

WHAT'S NEW

**Departmental Structure
Person Profile
Self Service
Absence Management**

Change Ahead

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Rollout 2 Key Terminology

Today	EDGE
Department	Human Resources Business Unit
DDL	Department ID
Pay Grade/ Salary Steps	Salary Grade
Employee Status	Employee Class
Bargaining Unit	Union Code
Pay Exception	Rate Code
Payroll Attendance Record Code (PAR Code)	Time Reporting Code (TRC)
Money Adjustment	Earnings Code
	Task Profile

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Process Overview for Labor Distribution

Labor Distribution Business Process

County Departments	County Departments	County Departments	County Departments	Central Departments	Central/County Departments
Create or Update COA and Projects	**1. Create or Update Task Profiles**	**2. Create or Update Task Groups and assign Taskgroup**	**3. Enter /Process Time**	**4. Process Payroll**	**5. Labor Distribution**

Automated Integration

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Step 1 - Task Profile

Step 2 - Task Group

Assign Taskgroup

Maintain Time Reporter Data

Betty Loche   ID   KU0007   Employment Record   0

     Organizational Relationship   Employee   Badge Detail   Group Membership

Time Reporter Data   🔍 | |◀ ◀   1 of 1 ▼   ▶ ▶| | View All

*Effective Date	01/01/2002 📅
*Time Reporter Type	Elapsed Time Reporter ▼
Elapsed Time Template	🔍
Punch Time Template	🔍
Time Period ID	🔍
*Workgroup	KUWRKGRP1 🔍 Positive Reporting/Needs App
*Taskgroup	PRTAMIAMI 🔍 TAMIAMI Park Taskgroup
Task Profile ID	PRTAMIPK 🔍 TAMIAMI Park Default
TCD Group	🔍
Restriction Profile ID	🔍
Rule Element 1	🔍
Rule Element 2	🔍
Rule Element 3	🔍
Rule Element 4	🔍
Rule Element 5	🔍
Time Zone	PST 🔍 Pacific Time (US)

*Status   Active ▼   ➕ ➖

Payroll
☑ Send Time to Payroll

Commitment Accounting
☑ For Taskgroup
☑ For Department

Save   Return to Search   Notify   Refresh   Update/Display   Include History   Correct History

Step 3 - Enter and Process Time

Timesheet

Step 4 – Process Payroll

Timesheet → [cycle diagram: Load Pay sheets/Payline Update, Calculate, Review Error Messages, Correct Errors] → Confirm Payroll

Step 5 – Labor Distribution

Paycheck   **Position Funding String**   **Time Reporter Data**   **Timesheet**

How do you count it for Finance?

This comes from Hyperion Budget

Default Task Profile here will override Position Funding

Enter Task Profile here will override TL Data

OR   **OR**

[X] **Project Costing**   [✓] **Project Costing**   [✓] **Project Costing**

Do I need this?

- You'll need this if

  - You have Capital Projects, Operating Projects, or Grant Projects

  - If you are charging to anything else other than your default

  - If you are tracking labor cost on spreadsheet and create journal entries to move or report cost, reach out to EDGE team

Next Steps

- Decide if your department will be using task profile by **February 28**th

- Please submit your response via email to EDGE@miamidade.gov

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Questions
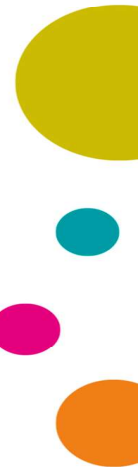
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Website http://www.miamidade.gov/employee/edge.page

EDGE Website