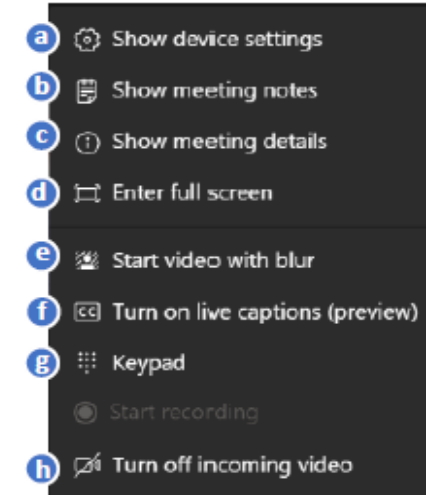
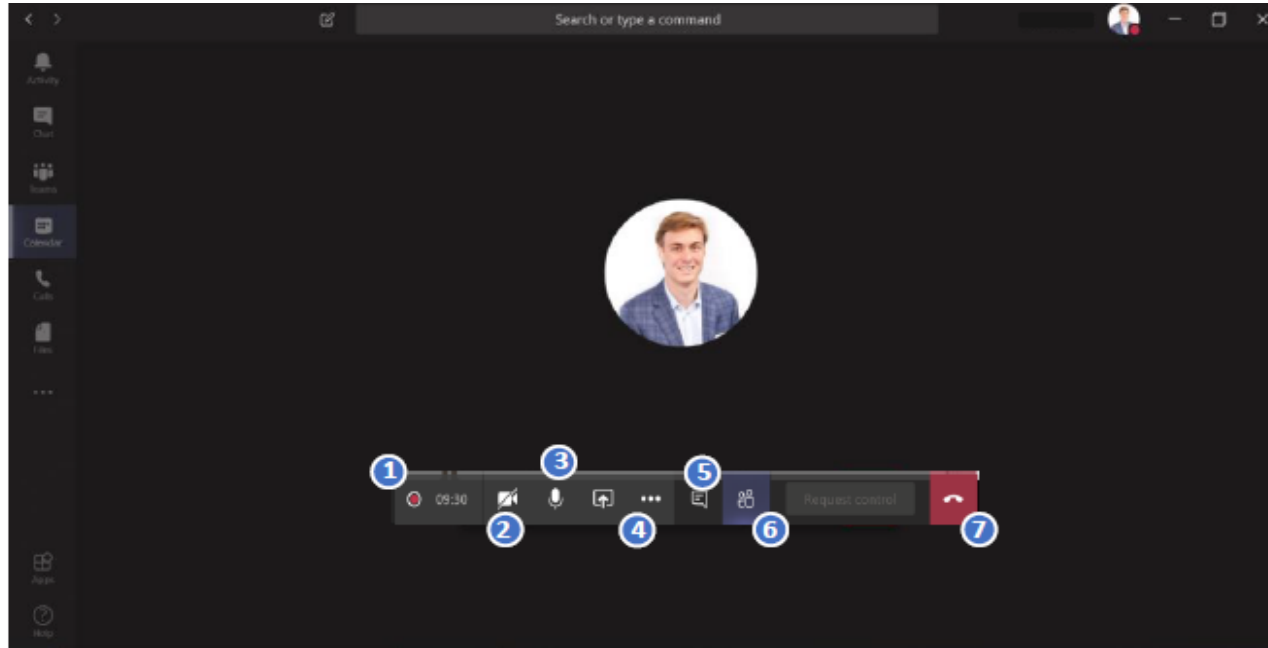


During a Call – Control Options



4: More Actions

1. Display if call is being recorded and the ongoing duration of call
2. Allows users to turn Camera On/Off
3. Allows users to mute/unmute microphone
4. Prompts more actions for users (**See right**)
5. Allows users to open and utilize chat function
6. Allows users to show participants
7. Allows users to hang up and leave the call

- a) Allows users to change personal audio and visual settings
- b) Allows users to take notes within call
- c) Prompts meeting details including dial-in info and shareable link
- d) Allows user to view meeting in full screen ('Esc' to exit full screen)
- e) Allows users to blur their background when camera is on
- f) Prompts closed captioning to be turned on
- g) Prompts keypad to allow user to call-in others
- h) Allows users to turn off incoming video from other participants



Change Executive/Agent Monthly Meeting

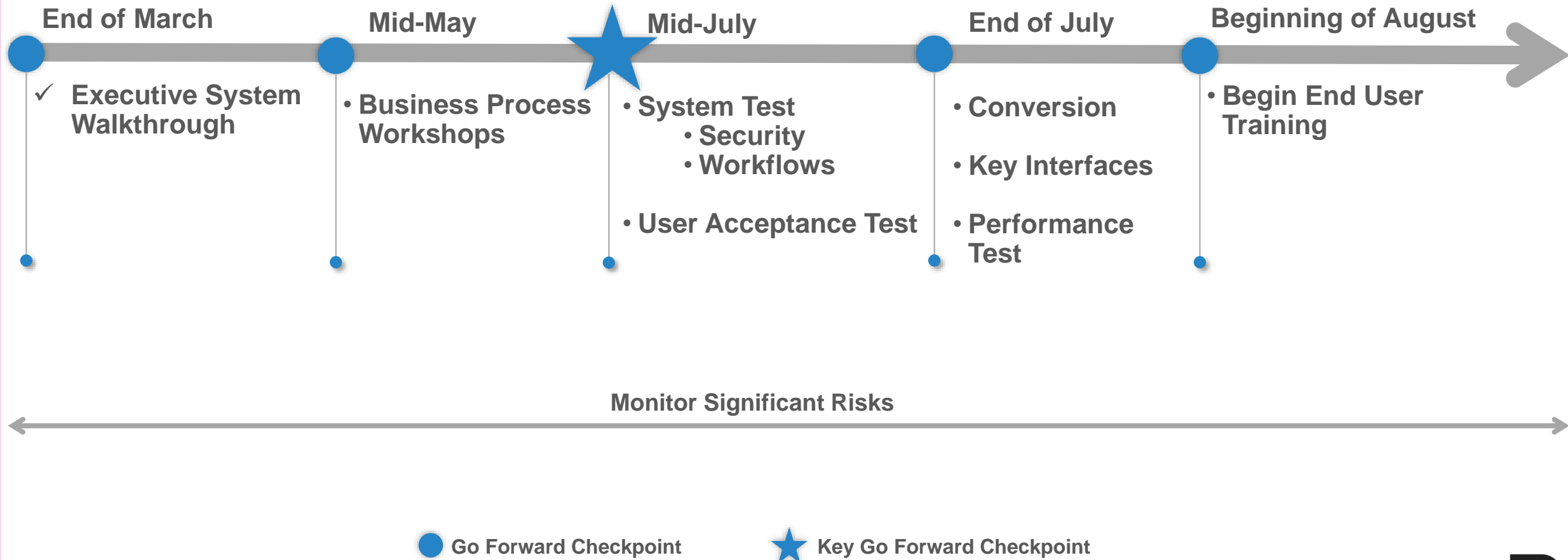
April 29, 2020

Agenda

- Project Status
- Business Process Workshops
- Change Impact Tool
- Role Mapping Activities
- Department/Office Task

Project Status

Rollout 1 Readiness Milestones



Business Process Workshop (BPW)

Business Process Workshops (BPW)

Objective: Communicate Business Process

- Present new Countywide business processes
- Discuss complex high-impact changes affecting many or all departments
- All County Departments/Offices invited
- Provide context for ERP roles within business process
- Provide guidance on ERP Role Mapping activities

Business Process Workshop (BPW) Topics

- Chart of Accounts (CoA) Setup, Process General Ledger & Budget Management
- Central Source to Pay
- Department Source to Pay
- Central Accounts Payable
- Department Accounts Payable
- Project Costing, Customer Contract & Grants
- Invoice to Cash

Business Process Workshop Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
Topic:	Chart of Accounts (CoA) Setup, Process General Ledger & Budget Management	Central Source to Pay	Department Source to Pay	Central Accounts Payable	Department Accounts Payable
Date:	May 4, 2020	May 5, 2020	May 6, 2020	May 7, 2020	May 8, 2020
Time:	9:00 AM – 1:00 PM	9:00 AM – 4:00 PM	9:00 AM – 4:00 PM	9:00 AM – 1:00 PM	9:00 AM – 1:00 PM
Topic:	Project Costing, Customer Contract & Grants	Invoice to Cash	Department Source to Pay		
Date:	May 11, 2020	May 12, 2020	May 13, 2020		
Time:	9:00 AM – 1:00 PM	9:00 AM – 1:00 PM	9:00 AM – 4:00 PM		

Business Process Workshop Invitees

Business Process Workshop Topic	Department Invitees
Chart of Accounts (CoA) Setup, Process General Ledger & Budget Management	<ul style="list-style-type: none">- Change Executives- Primary Change Agents- Finance & Budget Business Leadership Council- Finance & Budget Liaisons- Key Finance & Budget Representatives
Source to Pay	<ul style="list-style-type: none">- Change Executives- Primary Change Agents- Finance & Supply Chain Management Business Leadership Council- Finance & Supply Chain Management Liaisons- Central Finance & Procurement
Accounts Payable	<ul style="list-style-type: none">- Change Executives- Primary Change Agents- Finance Business Leadership Council- Finance Liaisons- Central Accounts Payable- IWA Support Group- Accounts Payable Liaisons
Project Costing, Customer Contract & Grants	<ul style="list-style-type: none">- Change Executives- Change Agents
Invoice to Cash	<ul style="list-style-type: none">- Change Executives- Change Agents- Finance Business Leadership Council- Finance Liaisons

Change Impact Tool

Change Impact Tool

As the Department/Office representative you will document Change Impacts in the fields below based on the information provided to you by the Project Team in the Column outlined in green

Business Process Area: Asset Creation & Maintenance		People	Process	Technology	Communication
Process	Sub-Process	<ul style="list-style-type: none"> • How will this change affect my department's end users? • Who will be affected? • How will their roles and responsibilities change? 	<ul style="list-style-type: none"> • What changes to our operating procedures are needed? • What changes to our forms and materials are needed? • What changes to our reports are needed? 	<ul style="list-style-type: none"> • What changes are needed to our existing systems? • Do we need any hardware or software? • Do any of our systems need an interface to the new system? • What is our plan to meet Data Conversion requirements? 	<ul style="list-style-type: none"> • Who needs to know these changes? • How and when will they know?
Asset Management	Create and Maintain an Asset				
Asset Management	Depreciate Asset				
Asset Management	Adjustments to Asset				
Asset Management	Retire Asset				
Asset Management	Process and Record Asset Transfer				
Asset Management	Asset Service and Maintenance				
Asset Management	Physical Inventory				
Asset Management	Asset Reporting				

Role Mapping

ERP Role Mapping

Objective: Assign end users to new ERP system roles

- All users require at least one role to transact or view within the ERP
- One person may have multiple roles
- Departments will assign their resources to the ERP roles

ERP Role Mapping Process

01



Role Mapping: Assigning end users to the new ERP system roles

- ERP roles are necessary to perform transactions in the ERP system
- All users require at least one role to transact or view within the ERP

02



Resources Available

- Role Descriptions
- Business Process Graphic
- Business Process Workshops
- EDGE Website
- Role Mapping Tool
- Existing FAMIS & ADPICS user list

03



Steps to Complete Role Mapping

- Utilize Business Process Graphic to determine roles necessary for Department
- Assign Department users to ERP roles in the Role Mapping Tool.

04



Where to go for Help?

- Department Change Agent
- Department Change Executives
- EDGE@miamidade.gov
- Daily Office Hours



**Remember
Communicate to
End Users**

Role Mapping Template

Last Name*	First Name*	Middle Name or Initial	Email Address* (Department-provided email)	Phone Number* XXX-XXX-XXXX	County Employee eKey Number*	NonCounty Employee ID Number*	General Ledger/Commitment Control	Accounts Payable	Accounts Receivable	Grants Manager	Project Costing	Procurement	Supplier	Supplier Contract	eSupplier	Billing	Cash Management	Strategic Sourcing	Asset Management	Additional Information
Smith	John	A.	john.smith@miamidade.gov	555-123-4567	e987654															

Step 1: Submitter Information

- Enter the name(s) of the individual responsible for completing the worksheets and submitting the workbook on the 'Cover' tab

Summary of Role Request Form	
Department:	
Submitted by:	
Submitter Phone:	
Submitter Email:	
Date Submitted:	

<i>Provide additional information below to identify individuals who assisted in completing the worksheets in this workbook -</i>	
Worksheet:	<i>Role Mapping</i>
Completed by:	
Completer Email:	
Last Revised Date:	

Step 2: Review Instructions Guide

Thoroughly review the 'Instructions' tab before completing the Role Mapping Template. The instructions outline step-by-step how to complete each field in the template and define available choices.

- Always use the dropdown menu when available

Role Mapping Instructions				
Thoroughly review this instruction document before completing the County Role Mapping Template. The steps below outline how to complete each field in the template and defined available choices. Always use the dropdown menu when available.				
Steps	Tab	Column (If Applicable)	Field (If Applicable)	Instructions
1	Cover	All	All	Enter the name(s) of the individual responsible for completing the worksheets and submitting the a workbook.
2	N/A	N/A	N/A	Submit your completed Role Mapping Workbook via email to the EDGE Project Team - EDGE@Miamiidade.gov Note: Update the Subject Line to include your department name and the submission date.
3	Role Mapping	All	All	Review the Role Mapping Materials
4	Role Mapping	A-G	End-User Contact Information	Complete the contact information for the end-user. Fields with an asterick (*) are required. Note : Accurate spelling of names is required for successful user access in EDGE. Name must be individual's legal name. It must not be a nickname. For example, if individual's legal first name is William, do not indicate the first name as Bill.
5	Role Mapping	H-GK	Business Area	Review Roles in the system in columns M-GP. Select from the drop-down menu Add , Remove or Update in the appropriate row and column for each end-user role in the system. Note : The Remove or Update drop-down should ONLY be used after your departments initial submission
6	Role Mapping	GM	Total Roles Changed	This field is available to illustrate the number of roles which have been updated within the row.
7	Role Mapping	GN	Notes/Explanation for Role Assignment	Enter Notes/Explanation for role assignment as needed.
8	Cover	All	All	Enter the name(s) of the individual responsible for completing the worksheets and submitting the overall workbook.
9	N/A	N/A	N/A	Submit your completed Role Mapping Workbook via email to the EDGE Project Team - EDGE@Miamiidade.gov Note: Update the Subject Line to include your department name and the submission date.

Step 3: Contact Information

Complete the contact information for the end users within your department that will need access in the ERP system.

- For Non-County Employee(s), include the Employee ID Number assigned i.e., T01234, C01234 etc.

Last Name*	First Name*	Middle Name or Initial	Email Address* (Department-provided email)	Phone Number* XXX-XXX-XXXX	County Employee eKey Number*	NonCounty Employee ID Number*
Smith	John	A.	john.smith@miamidade.gov	555-123-4567	e987654	

Step 4: Review Available Roles

- Review the list of roles with their associated description
- Below is a sample list of roles by their associated Business Area

General Ledger/Commitment Control
Accounts Payable
Accounts Receivable
Grants Manager
Project Costing
Procurement
Supplier
Supplier Contract
eSupplier
Billing
Cash Management
Strategic Sourcing
Asset Management
Additional Information

General Ledger/Commitment Control	Allocation Processor	Central Allocation Maintainer	Central Appropriation Approver	Central Appropriation Processor	Central GL Batch Processor	Central Chart of Accounts (CoA) Approver
	The Allocation Processor is responsible for processing Allocation Groups and verifying the allocation results.	The Central Allocation Maintainer is responsible for the creation and maintenance of Allocation Rules and Groups.	The Central Appropriation Approver has the ability to post Countywide controlling budget totals.	The Central Appropriation Processor has the ability to create Countywide controlling budget jobs. It is used to process new appropriation transactions interfaced from Hyperion.	The Central General Ledger (GL) Batch Processor has the ability to schedule and process General Ledger batch processes and jobs.	The Central Chart of Account (CoA) Approver is responsible for approving chartfield requests.

Step 5: Add End User Role(s)

- Identify end user(s) role by selecting the **Yes** option from the drop-down menu

Email Address* (Department-provided email)	Phone Number* XXX-XXX-XXXX	County Employee eKey Number*	NonCounty Employee ID Number*	General Ledger/Commitment Control	Allocation Processor	Central Allocation Maintainer	Central Appropriation Approver	Central Appropriation Processor
					The Allocation Processor is responsible for processing Allocation Groups and verifying the allocation results.	The Central Allocation Maintainer is responsible for the creation and maintenance of Allocation Rules and Groups.	The Central Appropriation Approver has the ability to post Countywide controlling budget journals.	The Central Appropriation Processor has the ability to create Countywide controlling budget journals. This user also has access to view Appropriation transactions interfaced from Hyperion.
john.smith@miamidade.gov	555-123-4567	e987654			<div>Yes</div>			<div>Yes</div>

Step 6: Processor vs Approver

- For end user(s) who are assigned *Processor/Requestor* role(s) should not have an *Approver* role
- Row(s) within each Business Area will be highlighted in **Red** to prompt awareness

Phone Number* XXX-XXX-XXXX			General Ledger/Commitment Control	Allocation Processor	Department Appropriation Approver	Department Appropriation Processor
County Employee eKey Number*				The Allocation Processor is responsible for processing Allocation Groups and verifying the allocation results.	The Department Appropriation Approver is responsible for approving department appropriation budget update requests.	The Department Appropriation Processor is responsible for the creation of a budget journal to request or transfer budget for the department.
555-123-4567	e987654				Yes	

Phone Number* XXX-XXX-XXXX			General Ledger/Commitment Control	Allocation Processor	Department Appropriation Approver	Department Appropriation Processor
County Employee eKey Number*				The Allocation Processor is responsible for processing Allocation Groups and verifying the allocation results.	The Department Appropriation Approver is responsible for approving department appropriation budget update requests.	The Department Appropriation Processor is responsible for the creation of a budget journal to request or transfer budget for the department.
555-123-4567	e987654				Yes	Yes

- The EDGE Project Team will not accept submitted worksheet with these error(s) unless it includes an ***Exception Request Email***
- ***Exception Request Email*** must be submitted with your submission and approval from Department Executive(s)

Step 7: Workflow

- Two roles require additional end user information
 - Requisition Processor
 - Purchase Order Buyer
- Any user assigned Requisition Processor and Purchase Order Buyer will require additional information
- Enter user information on the "Requisition Processor Workflow" or "Purchase Order Buyer Workflow" tabs, as appropriate
- Always use the dropdown menu when available

Step 8: Submit Department Role Mapping

- The Role Mapping Instructions Guide includes a direct link to your department submission
- Your complete Role Mapping Template should be emailed to EDGE@Miamiidade.gov by **May 19, 2020**
 - Subject Line: Role Mapping – Department Name_Date
 - i.e. **Role Mapping - Fire_052020**

N/A	N/A	N/A	Submit your completed Role Mapping Workbook via email to the EDGE Project Team - EDGE@Miamiidade.gov Note: Update the Subject Line to include your department name and the submission date.
-----	-----	-----	--

Role Mapping - DEPT NAME_DATE - Message (HTML)

File Message Insert Options Format Text Review Help Tell me what you want to do

Paste Basic Text Names Include Tags Voice My Templates

Clipboard

Send

From Karla.Goris@miamidade.gov

To EDGE@Miamiidade.gov

Cc

Bcc

Subject Role Mapping - DEPT NAME_DATE

- Once the Role Mapping is emailed to the EDGE Project Team
 - A confirmation email will be sent from the EDGE Project Team to the Change Agent/Executive

We Are Here For You

- Role Mapping Office Hours will be held daily **May 13, 2020 – May 22, 2020 at 11:00 AM – 12:00 PM**
- Questions/Comments can be submitted to the EDGE Inbox
 - EDGE@MiamiDade.gov
- The submitted Role Mapping will be reviewed by the Project Team
 - **Only** if necessary, will further feedback be provided

Your Role: Change Executives/Agent Role

- ☐ Attend Business Process Workshops
- ☐ Confirm invited department representatives attend the Business Process Workshops
- ☐ Coordinate department completion of the Change Impact Tool
- ☐ Coordinate department completion of the Role Mapping Template
- ☐ Submit completed Role Mapping
- ☐ Coordinate questions between project team and your department

Department/Office Task

Integration Inventory Task

- The EDGE team has identified an inventory listing of HR interfaces
- *Interfaces vs Reports vs Online Pages*
 - Interfaces – A file exchanged between two systems for further processing
 - Report – Document received/pulled from an application/system
 - Online Pages – Real time data can be viewed
- If you have any current integration with HR applications (i.e., PeopleSoft) not already listed in the Integration Inventory, please contact the EDGE team
- Submit your complete spreadsheet via email to EDGE@MiamiDade.gov by **May 15, 2020**

Integration Inventory Task

ID	Interface Title	Source	Target	Inbound/ Outbound	Partner(s)/Departments Identified	Yes/No	Department/Office/Trust	Comments
INT-AB-237	Outbound Absence Balances	PeopleSoft	MDFR TRANSIT	Outbound	MDFR TRANSIT			
INT-HR-005	Applicant Information	PeopleSoft		Outbound				
INT-HR-008	Employee Information (Job, Personal, Position)	PeopleSoft		Outbound				
INT-PY-070	Inbound Uniform and Tool Allowances	Multiple	PeopleSoft	Inbound				
INT-PY-078	Ability to accept interface of adjustment for W-2 purposes		PeopleSoft	Inbound				
					TimeClocks (OPS, Time Track, KABA) MDFR Transit/OPS Animal Services (GRPS 1-4) Parks/Recreation Public Works & Waste Mgmt Seaport Operations & Security			
INT-TL-045	Inbound Time and Labor - Time	TimeClocks (OPS, Time Track, KABA)	PeopleSoft	Inbound				
					TimeClocks (OPS, Time Track, KABA) Transit/OPS Animal Services (GRPS 1-4) Parks/Recreation Public Works & Waste Mgmt Seaport Operations & Security			
INT-TL-069	Inbound OPS Time and Labor (Inbound Schedules)	TimeClocks (OPS, Time Track, KABA)	PeopleSoft	Inbound				
INT-TL-066	Inbound Time and Labor - Absence	MDFR OPS (Transit)	PeopleSoft	Inbound	MDFR Transit/OPS			

- **Yes/No** – Indicate if your department is currently using the interface
- **Department/Office/Trust** – Select your Department/Office/Trust
- **Additional/Comments** – Provide additional

Contact Us



Email us EDGE@Miamiidade.gov



Visit the EDGE
Website <http://www8.miamidade.gov/employee/edge.page>

Questions?

