BREAZ
BUSINESS RE-ENGINEERING ARIZONA

IN THE SPOTLIGHT

John Valentine
BREAZ Logistics Team
Security and Workflow Lead

My name is John Valentine. I have worked for the State of Arizona for over 7 years. I was the Business Systems Application Manager at ADOT for the first 6 years, before moving to the BREAZ Project last year. Prior to working with the State, I managed Training and Communications teams for Target Corporation and Citibank. While most of my work has been with finance and systems, my very first job out of college was as a high school special education teacher. I attended USD and SDSU while picking up my Bachelor's and Master's degrees. Many people ask if I liked going to college in San Diego, but these schools are actually in my home state of South Dakota.

My time with the BREAZ Project has been both challenging and fun. I work with the Logistics Team.   We cover facilities and inventory management, as well as system security and workflow for Advantage, TRIRIGA and Maximo, which is my main focus.   There is a lot of information to learn and I count on my teammates on the BREAZ Project to help me out. It is truly a team effort and I appreciate working with such a great group of people.

Most recently, I have been meeting with the departments to discuss security roles and workflow for the financial functional areas. My CGI partner, Maranda Chui, has taken the lead on much of the systems work behind the scenes and I am excited to work with her to make sure everyone is ready to roll for User Acceptance Testing (UAT) and Go-Live next July. I've always been a proponent of change, and feel that change is the catalyst that helps move us from good to great!

Outside of work, I enjoy spending time with my family.   My only daughter just started her senior year at Hamilton High School in Chandler, and my parents just moved here full time from South Dakota. I run 3 miles most days and like to stay active with hiking, biking and swimming. In the past year, I've competed with other members of the BREAZ Team in the Ridiculous Obstacle Challenge and the Warrior Dash. We certainly know how to work hard and play hard as a team!

NEWS FLASH

TRANSACTION CODE (TC) CROSSWALKS

For those agencies currently using AFIS, Transaction Code (TC) is a familiar term. In Arizona Advantage, the agencies will be using Event Types, which are similar to TCs in AFIS. An Event Type, by definition:
"… controls smaller components of accounting activity that are used to perform a specific accounting, budgeting or non-accounting activity. It brings in specific rules for data entry concerning referenced transactions, customer codes, vendor codes, and all defined chart of account elements in the system."

With the implementation of Arizona Advantage, the end-users will use Event Types much as they do TCs today. Because the Arizona Advantage end-user will be using Event Types that will not mirror TCs, the BREAZ Project Team is working on mapping Event Types to TCs. This will assist the end-user in becoming familiar with Event Types. This will become a useful reference for July 1, 2015 forward.

Two examples of Event Types and their corresponding AFIS TCs are:

- Deposit of Revenue: Arizona Advantage Cash Receipt (CR) Event Type AR01 (Earned Collected Revenue) --> AFIS Batch type 2, TC 190
- Payment Request – Miscellaneous: Arizona Advantage General Accounting Expenditure (GAX) Event Type AP01 --> Batch type 4, TC 222

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TRAINING TALK

What will my training experience look like?

We know you have been hearing lots of buzz around training. Let's take a look!

Step 1: Enroll in courses – In early 2015, you will be able to log into YES and be able to see the list of courses that you will be required to attend to gain access to the new AFIS system. It will be your responsibility to log into YES and sign up for your required courses.

Some of these courses will be hands-on, taught by an instructor and presented in a classroom. Other courses will be Web-Based Training (WBT) sessions that you can attend at your desk, via the Internet. The learning path for your job responsibilities will help you get ready for the new AFIS.

Step 2: Complete introduction WBTs – Prior to attending instructor-led courses, you will need to take a couple of required WBT courses. The first course is an introductory course that introduces everyone to the new AFIS. Topics that will be covered include:

- Welcome to AFIS
- High-level overview of AFIS
- New global business procedures
- Available resources
- Relationship with other systems

The second WBT that you must complete will be a navigation basics course. This WBT will provide basic navigation training which includes topics like:

- Basic navigation throughout AFIS
- Basic inquiry
- Basic document entry
- Generic processing buttons
- Screen explanations
- Help
- Reporting

Additional WBTs may be a part of your learning path. Once you have successfully completed the required WBTs, you are ready to attend classroom training.

Step 3: Read related Statewide Arizona Accounting Manual (SAAM) -- SAAM will be revised to support the statewide business processes and the new AFIS. You will be required to read the appropriate information prior to attending End-User (EU) Training.

Step 4: Attend EU Training – In May and June, 2015, you will attend the end-user courses you registered for in Step 1. When you attend your courses, you will bring a copy of the training guide that will be sent as part of your registration confirmation email, something to write with, and that is all. Your hands-on instructor-led courses may last anywhere from 2 hours to a maximum of 8 hours for one functional area. Be ready to listen, learn, and try the concepts being taught.

Step 5: Access to system granted – Once you have successfully complete all of your required courses, you will be granted access into the new AFIS system starting on July 1, 2015. You MUST attend the required courses to be granted access.

These 5 steps will prepare you to successfully cross over into the new AFIS system. Get ready!

POSITIONING FOR SUCCESS
AGENCY TRANSITION
Featuring
Department Of Revenue

Meet Agency Coordinator:
Tom MacConnel

BREAZ: What is your job title?
TOM: Revenue Accounting Administrator

BREAZ: How long have you worked for the State of Arizona?
TOM: I just hit 28 years with the state on June 30. A little known fact is that I am a GAO Alumni, as I spent the first year and a half at GAO before moving onto Revenue.

BREAZ: What do you enjoy most about working for your agency?
TOM: The daily "opportunities to excel" that result from being in the taxation business has kept me coming back every day. This, of course, presents opportunities to work directly with the taxpayers we serve and there is satisfaction in helping to assist with the desired outcome for our customers.

BREAZ: What are your expectations for the new system and business processes?
TOM: The hope is that the system will be able to make revenue reporting available for the major tax types for the Department administers to our stakeholders who then can use it on demand. Also, we expect to leverage the Data Warehouse and standard reporting for expenditure and budget analysis. Additionally we hope to leverage the technology available to take the manual work out of some of our processes.

BREAZ: How are you getting your agency prepared?
TOM: We are following the "Cindy Smith (DHS Controller) Model" for approaching the transition to the new system. Although we are a bit behind we expect to have examined and identified changes to our processes by the end of the summer. Additionally, as Agency Coordinator, I have been meeting with the identified Functional Leads to work thru the different facets of the project including transition, workflow, UAT planning, etc. As we work our way through the transition process, we will be working with the team members directly to discuss and document changes to our procedures as a result of the project.

BREAZ: How do you see your agency operating after the new system goes live on July 1, 2015?
TOM: The vision is that we will have created some efficiency, especially in the revenue accounting arena, so that we will be in a position to better serve the taxpayers of Arizona as well as our co-workers. We also hope that with better reporting tools the department will be in a position to better manage the resources appropriated.

FUNCTIONALLY SPEAKING
TRANSACTION CODES, FORMS & REPORTS

At the April Agency Coordinator meeting, we presented the Arizona Advantage cash receipting process as part of the General Accounting Spotlight. During the presentation, we referred to the AFIS Transaction Codes (TC) and GAO forms that are currently used by most agencies when recording transactions like cash receipting in Arizona Advantage. At that time, we realized just how important it was to provide:

- Agencies that use AFIS with a crosswalk of AFIS TC to Advantage Event Types and

- All agencies a list of current GAO forms and their disposition (Eliminate, Keep & Change, Keep As-Is).

Prior to the April meeting, the BREAZ Functional Team started building a TC to Event Type crosswalk and is currently in process. In addition, the BREAZ Project Team has been working on forms disposition and building an inventory of reports. There has been significant analysis done to build these reference materials, which will be distributed in late August.

The **TC Crosswalk** is large, encompassing all Advantage Documents and Event Types, but probably only 20-25 of those Event Types will be used in critical processes for July 1, 2015. We are concentrating on the critical processes for the crosswalk being distributed in late August. Two examples of Event Types and their corresponding AFIS TCs are:

- Deposit of Revenue: Arizona Advantage Cash Receipt (CR) Event Type AR01 (Earned Collected Revenue) --> AFIS Batch type 2, TC 190

- Payment Request – Miscellaneous: Arizona Advantage General Accounting Expenditure (GAX) Event Type AP01 --> AFIS Batch type 4, TC 222

Although the **Forms Disposition** worksheet is complete, the form revisions are still in progress. The worksheet will include a Disposition Category that summarizes the reason for the disposition (e.g., Workflow, Combine Similar Forms, and Policy Change) and the current forms will be attached for reference. Three examples on the worksheet are (Form Number, Form Name, Disposition, and Disposition Category):

- AFIS-101, Appropriation Load Information, Eliminate, Workflow

- GAO-5, Warrant Copy Request, Keep & Change, Update Form Field(s) or Verbiage

- GAO-6, Warrant Replacement Request, Keep As-Is, NA

The **Reports Inventory** will provide a list of reports based on functional areas. We plan to provide first drafts of these reports at the end of August 2014, to provide insight to report content. Two examples from the worksheet are (Report Title, Report Description, and Functional Area):

- Detailed Appropriation Activity by Unit and Task, Detailed Appropriation Activity by unit and Task broken out by revenue source and expenditures, General Ledger

- Transaction Register by Department, Listing of fixed assets by department, Asset Management

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STATE TRAINING TEAM UPDATES

Please Welcome
Jacqueline Todd
Newest member of the BREAZ State Training Team

Jacqueline joined the BREAZ Project July 14, 2014, after almost 10 years at Arizona State University. Jacqueline's experience includes previous Advantage use, facilitating a Train the Trainer program for a variety of software products to students at ASU and many years of staff training and leadership development. Jacquie is excited to be a part of the BREAZ Project and looks forward to Go-Live in July 2015!

In other State Training Team News ...

We are still in the process of confirming training locations statewide for May and June 2015. We would like to say thank you to Game and Fish for making your site available. The list of agencies opening up their sites for us is growing! If you would like to be added to the list of training sites please contact us via e-mail at BREAZ@azdoa.gov. The State Training Team is continuing site visits and would love the opportunity to come meet with you at your site.

Thanks for Your Help!

PROJECT ACTIVITIES AT A GLANCE
August – October 2014

- Workforce Transition Planning
- System Testing
- Integration Testing
- Interface, Conversion and Report Software Construction
- Training Guide Development

AUGUST WORD SEARCH PUZZLE

Give it a try. See how many of the words listed in the right-hand column you can find in the word search box on the left below.

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N U M W K N C G V R W E W T S
W O B C L L N O E P R M I E N
I T I W O I A P E U Q I N E O
U U X T N N O W T K D J T H I
T N U I A R V I S P C Z E S T
E R A I T I D E A S I W R K C
S R M I V N R E R I O T F R A
T H N E E D T P P S F R A O S
I G A P D Q K D O O I W C W N
N K X L E N H G R R S O E O A
G E W O R K F L O W P I N Y R
N A V I G A T I O N H P T O T
M O O R S S A L C G D B A Q D
H S S P D N T K A D Z M M U H
B O O L P G P Z G W N C E F C
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APPROPRIATION
CLASSROOM
CONVERSION
CROSSWALK
DEPOSIT
EXPENDITURE
INTERFACE
NAVIGATION
REPORTING
TESTING
TRAINING
TRANSACTIONS
WBT
WORKFLOW
WORKSHEET

Solution to the July Puzzle

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+ + + + N C + L + + + + + + + + + K + +
+ + G + + O A + + + + + + + + + L + + +
+ R O T A N I D R O O C + + + A + + + +
+ + L + R F + T N + + + + B W + + + + +
+ + A E Z I D R A D N A T S Y Y + + + +
+ + T + + G O O V I + + S C T + + + + +
+ N A + + U + P I + C O N I + + + + + +
I + C + T R + P G + R E D + I + + + + +
+ U + I + A S U A C I O R + N + + + + +
+ + N + + T M S T C M E + P T T + + + +
E G + P + I R C I M T R A V E L + + + +
+ C + + E O O F O A S B O S R D + + + +
+ + R + + N F C N + + + T H F + + + + +
+ + + U T E D G + + + E + E A + + G + +
+ + P R O F I L E S R + + L C + N + + +
+ W O R K S H O P S + + + L E I + + + +
+ L L + E + E + + + + + + M + O + + + +
S + I D Y T I R U C E S + O + + V + + +
+ E C + + + + + + + + + + Y + + + + N +
+ + Y + + + + + + + W + + + + + + + I
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Over, Down, Direction

ASBO(10,12,E)
CATALOG(3,8,N)
COMMODITY(8,13,NE)
CONFIGURATION(6,1,S)
CONTROLS(8,11,SW)
COORDINATOR(12,3,W)
CROSSWALK(10,9,NE)
CSB(14,6,N)
DEPRECIATION(16,12,NW)
DESIGNATE(4,18,NE)
EFFICIENCY(6,14,NE)
FORMS(7,13,N)
INTERFACE(15,8,S)
INTERNAL(1,8,NE)
INVOICE(20,20,NW)
NAVIGATION(9,4,S)
POLICY(3,15,S)
PROFILES(3,15,E)
RESOURCE(8,18,NW)
ROUTING(8,5,SW)
SECURITY(12,18,W)
SHELL(14,12,S)
STANDARDIZE(14,5,W)
SUPPORT(8,10,N)
TESTERS(16,10,SW)
TRAVEL(11,11,E)
UNPEND(2,9,SE)
WORKSHOPS(2,16,E)
WYOMING(12,20,NE)
YES(3,20,NW)

SEPTEMBER NEWSLETTER HIGHLIGHTS

A preview of what is coming up next month

- HRIS Integration Approach

- Data Classification/Security

- Report Governance

- User Acceptance Tester Training in November and December 2014

BREAZ
BUSINESS RE-ENGINEERING ARIZONA

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