



# ERP Team Roles and Responsibilities

## Table of Contents

Purpose: ..... 2

ERP Team ..... 2

ERP Executive Sponsors..... 2

ERP Governance & ERP Steering Committe..... 3

Program Manager..... 5

Functional Team..... 5

    Functional Lead (HRM, FIN, PB)..... 5

    Functional Team Members (Business Analysts) ..... 6

    SMEs..... 7

Technical Team ..... 8

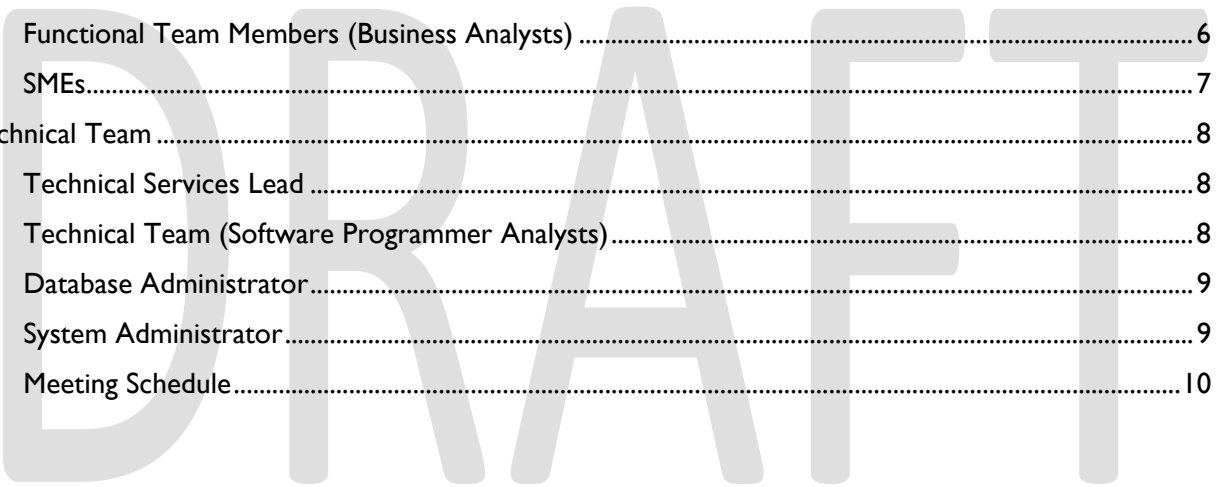
    Technical Services Lead ..... 8

    Technical Team (Software Programmer Analysts)..... 8

    Database Administrator ..... 9

    System Administrator..... 9

    Meeting Schedule..... 10



# ERP Team Roles and Responsibilities

## Purpose:

The purpose of this document is to outline roles and responsibilities of the ERP program resources. This document provides the guiding principles related to management of ERP project and operational activities, however this will serve as a 'living' document and may need to be revised based on changing business needs or ERP Governance direction.

## ERP Team

Figure 1. ERP Team Organization Chart

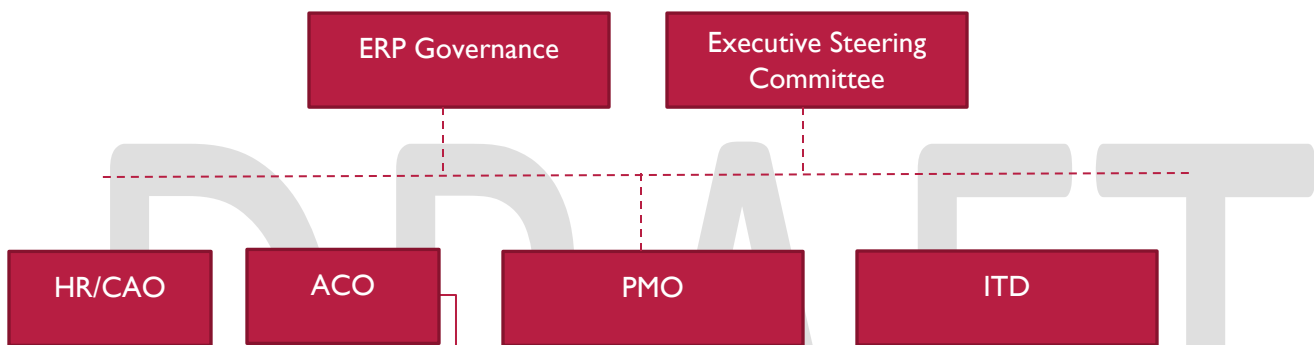


Table 1. ERP Team Roles & Names

Position	Names
Executive Sponsors	Rupa Shah, Irma Ramirez-Bough, Lew Bauman
ERP Governance	Lew Bauman, Rupa Shah, Irma Ramirez-Bough, Eric Chatham
Executive Steering Committee	Gary Giboney, Burcu Mousa, Kim Moore, Paul Lewis, Paresh Patel, Michelle Karim
Program Manager	Michelle Karim
Functional Team Leads	Kim Moore, Patsy Girard, Idalia Ow, Becky Gong, Eden Braganza, Randee Roth, Jesus Yanez-Loeza, Juan Pablo?, Michael Lewis?
Functional Team Members	Paulette Clark, Maria Partido, Arturo Roque, Randee Roth, Jesus Yanez-Loeza, Juan Lopez, Alex Estey, Sylvia Zoellin, Sunny Haight, Judith Taperla, Warner Howser, Debi Glau-Richards, Kevin Tate, Bob Janssen, Usha Talabhaktula, Mike Alcorn
Technical Team Lead	Anusha Ignatius
Technical Team Members	Cynthia Alcalá-Sy, Annette Vesely, Michael Bolinger, Eric Regalado, Chris Iganoba

## ERP Executive Sponsors

Define the program's structure, roles, responsibilities, major functions, decision rights and oversight. Fill key roles, such as the program director, business change manager and individual project managers. Frame the quality, risks, compliance and controls (QRCC).

Executive Sponsors include:

# ERP Team Roles and Responsibilities

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- CAO: Lew Bauman
- Auditor Controller: Rupa Shah
- HR Director: Irma Ramirez-Bough

The Executive Sponsors are the "owner(s)" of the project or operations.

*Key responsibilities include:*

- Defining the vision and high-level objectives for the project
- Authorizing the provision of funds/resources (internal or external)
- Approving any major changes in scope

## ERP Governance & ERP Steering Committee

The success of the project and operational activities is part of the goals and objectives for everyone on the governance group and the steering committee. The main responsibilities of the ERP governance are to:

- Make strategic choices and decisions about how the project or operational tasks are executed
- Provide leadership and direction to the project or operations
- Make, sponsor, and enforce the appropriate ERP decisions
- Set and monitor policies and principles for the project and operations
- Focus primarily on how the project delivers against the ERP strategy, in turn enabling the execution of the business strategy

The governance team is the "final arbiter" of decisions and major organizational changes to support the business transformation project.

Members of the governance group include:

- CAO: Lew Bauman
- Auditor Controller: Rupa Shah
- HR Director: Irma Ramirez-Bough
- IT Director: Eric Chatham

The ERP governance framework provides a clear foundation for decision making by referencing and ensuring conformance with:

- County governance
- IT governance

# ERP Team Roles and Responsibilities

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- ERP strategy
- System Controls

To reinforce the importance of the ERP project to middle management and staff, executive business management will sponsor and engage with the project as the Executive Steering Committee. This committee will have sustained and visible active participation throughout the project. This means more than just attending steering committee meetings; mere participation is insufficient. The steering committees will be actively engaged in critically reviewing and guiding the project to success through clear direction, making resources available and decision making.

Members of the executive steering committee include:

- Chief Deputy ACO: Gary Giboney
- Chief Deputy ACO: Burcu Mousa
- Assistant Director HR: Kim Moore
- Budget Director CAO: Paul Lewis
- Applications Division Manager ITD: Paresh Patel
- ERP Project Manager: Michelle Karim

*Key responsibilities:*

- Making management decisions related to project, scope, and operations priorities
- Executing day-to-day ERP project and operations activities
- Carrying out policy
- Administrative oversight of project budget and timeline
- Ratification of project decisions
- Assisting the project sponsor with the definition of the project vision and objectives
- Undertaking quality reviews prior to the completion of each project milestone
- Ensuring that all business risks are identified and managed accordingly
- Ensuring that all appropriate vendor contractual documentation is in place

## **Escalation Process**

The ERP team is empowered to make most decisions regarding the management of the project. The executive steering committee will resolve any issues not settled by the project team. If necessary, the steering committee will escalate decisions to ERP governance.

## Program Manager

The position provides overall leadership for ERP projects, oversees implementation of the ERP and new modules or upgrades, and drives continuous improvement to business processes and business results based on the capabilities of the ERP solution. The position also assists in coordinating ERP maintenance and enhancement efforts to leverage enterprise resources, knowledge and best practices.

### Key responsibilities:

- Maintaining complete autonomy for the management of the ERP Program to meet the needs of the business, as articulated by the ERP steering committee.
- Working with business leaders to identify and secure appropriate project team members.
- Making adequate facilities and all technical resources available for the implementation.
- Maintaining and controlling the ERP project schedule and assigned resources.
- Responsible for management or oversight of ERP projects, including project planning, resource allocation, steering committee leadership and team organizational structure management.
- Being responsible for project communications.
- Managing project scope, risk and issue resolution.
- Being responsible for the quality of project deliverables.
- Managing integration of the packaged solution into the enterprise technical architecture and business environment.
- Responsible for ensuring that the project can deliver the benefits outlined in the business case, and that it meets the reasonable expectations of end users.
- Responsible for development of a detailed project work plan
- Provide post implementation support and assist project team with prioritizing production software issues and planning patch deployments
- Work with project team members to prioritize configuration tasks and scheduling
- Provide support to BA's for monitoring and managing ERPHELP incidents and escalating urgent issues or requests that require immediate attention
- Prepare and present monthly Leadership status reporting
- Provide project coordination/management support for ERP operational activities as needed or requested by ERP Governance or Executive Steering Committee

## Functional Team

### Functional Lead (HRM, FIN, PB)

Functional leads are typically individuals deeply experienced in the business processes. The leads should be either the business process owners or the individuals empowered to make design decisions on behalf of the business process owner.

## *Key responsibilities:*

- Championing Business Process Change
- Managing process scope for functional areas.
- Liaising with business process owners and superusers.
- Obtaining buy-in from both the business process owners and users.
- Managing execution of user acceptance testing.
- Resolving all issues assigned to the business function, including change management issues.
- Ensuring communication with, and resourcing from, the business community and group.
- Signing off the design; approve and release the software for implementation.
- Develop training curriculum and conduct training sessions as required.
- Participates in project team meetings as needed/required.
- May be responsible for submitting functional issues to vendor and prioritizing. Accountable/responsible for issue validation and providing approval for deployment to Production.
- Responsible/consulted for patch documentation review; accountable/responsible for patch testing/validation.
- Consulted/responsible for incident response and resolution.
- Accountable for security and workflow changes
- Accountable/responsible for requirements, design, testing, and approval for interfaces, forms, reports, and configurations.

## **Functional Team Members (Business Analysts)**

The team will participate in all aspects of the project and operational activities in accordance with the project plan.

## *Key responsibilities:*

- Participating in the definition of user requirements, document business processes, review of the current business process baseline, and communicating future business requirements.
- Participating in business requirements mapping to the ERP applications.
- Coordinating and performing any required application and integration testing per the test plan for system test.
- Working with superusers to build all end-user documentation.
- May contribute to developing training curriculum and conducting training sessions.
- Developing and/or revising business process changes with respect to the operations of the ERP applications.
- Attending project meetings when required.

# ERP Team Roles and Responsibilities

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- Contributes to developing customization documentation, the user guide, procedures and quick reference guides.
- Facilitating schedules and requirements of the subject matter experts (SMEs).
- Responsible for coordinating patch deployments and testing with PA's, Functional Leads, and SME's. Initiates region data refresh and payroll run requests.
- Responsible for monitoring, researching, and resolving ERPHELP incidents on a daily basis.
- Responsible for application security processing.
- Contributes to interface requirements, design, development, and testing.
- Responsible for working with Functional Lead/SME's to document reporting requirements.
- Responsible/contributes to reporting design, development, and testing.
- Responsible for working with Functional Leads/SME's and contributes to application configuration design setup and execution.

## SMEs

The SMEs will participate in all aspects of the project and operational activities in accordance with the project plan. Most of these team members will have part-time roles on the project.

### Key responsibilities:

- Participating in the definition of user requirements, as required.
- Participating in the review of the current business process baseline and communicate future business requirements, as required.
- Participating in business requirements mapping to the ERP applications, as required.
- Performing any required application and integration testing per the test plan.
- Making decisions regarding the business aspects of interface and conversion programs, as required.
- Attending project meetings when required.
- Verifying customization documentation, user guide, procedures and quick reference guides, as required.
- Develop training curriculum and conduct training sessions as required
- May be responsible for application issue submission, prioritization, patch documentation review, validation/testing, and recommendation/approval to deploy to Production.
- May be consulted and responsible for ERP incident response and resolution when applicable.
- Responsible/consulted for requirements, design, development, testing, and recommendation/approval to deploy to production for Interfaces, reports, forms, and configurations.

## Technical Team

### Technical Services Lead

#### Key responsibilities:

- Working with the technical team and vendors to resolve major IT infrastructure issues.
- Assisting technical staff in identifying IT contacts.
- Designing system architecture.
- Confirming security compliance.
- Defining technical acceptance criteria.
- Specifying key system components.
- Establishing and supporting the system environments.
- Supporting the team technically.
- Coordinating the implementation of local infrastructure.

### Technical Team (Software Programmer Analysts)

The technical team's role is to provide development assistance to the project and operational activities in relation to the analysis of interface utilities, conversion programs, application enhancements, development of ERP alerts, triggers and database links as necessary.

#### Key responsibilities:

- Developing identified enhancements.
- Integrating system components.
- Contributes to requirements, design, and responsible for Development and deployment of interfaces, reports, and forms.
- Accountable/Responsible for reviewing patch documentation and implementing ERP application patching.
- Accountable/Responsible for monitoring and resolution of ERP Technical incidents.
- Managing application changes across development, testing and production systems.
- Supporting application consultants (CGI/CTL).
- Establishing and supporting ERP environments.
- Monitoring system performance and administering application (LDAP/ AD setup, WebSphere configurations).
- Server Security administration.
- Supporting definition and set-up of technical procedures.



# ERP Team Roles and Responsibilities

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- Documents and submits application technical issues to vendor (CGI/CTL).
- Develops, maintains, and monitors Batch Cycles.
- Provides support for application configuration changes designated by the Functional Leads and Business Analysts

## Database Administrator

The database administrator (DBA) will be supporting the database environment for the entire ERP (FIN, HRM, PB) system.

### *Main responsibilities:*

- Creating the ERP databases.
- Maintaining database security.
- Performing regular database maintenance tasks, including reorganizing tables and indexes; analyzing tables; and sizing indexes, tables and table spaces.
- Creating and maintaining SQL accounts for the ERP project team.
- Assisting the system administrator with the database backup schedule.
- Assisting the system administrator and technical manager in the disaster recovery plan.
- Performing the regular and ad hoc backups of the ERP databases.
- Tuning of the SQL server relational database management system (RDBMS).
- Assisting in the database portion of the performance testing.
- Monitoring the SQL server RDBMS logs.
- Developing scripts for database backups and maintenance.
- Assisting the technical team in SQL statement tuning.

## System Administrator

The System administrator will be responsible for the server maintenance and network support as it relates to the ERP project and operational activities. This includes:

- Liaising with the ERP DBA.
- Monitoring ERP app overall performance and alerts, including all server and storage infrastructure.
- Maintaining the ERP server backbone.
- Troubleshooting network outages and assisting in the network performance testing.
- Setup secure redundant external web architecture for the application; this may include the DMZ, firewalls, SSL accelerators, routers and switches.
- Assisting the technical manager in the disaster recovery plan.



# ERP Team Roles and Responsibilities

## Meeting Schedule

Below is the meeting schedule for the ERP Program:

Meeting	Frequency	Invitees
ERP Leadership Update	Every other month	Rupa Shah, Irma Ramirez-Bough, Lew Bauman, Eric Chatam, Gary Giboney, Burcu Mousa, Kim Moore, Paresh Patel, Paul Lewis, Michelle Karim
Executive Steering Committee	Every month	Gary Giboney, Burcu Mousa, Kim Moore, Paul Lewis, Paresh Patel, Michelle Karim
Weekly Configuration Task List Review (HRM)	Every Tuesday	Michelle Karim, Kim Moore, Patsy Girard, Idalia Ow, Paulette Clark, Maria Partido, Arturo Roque, Alex Estey, Sylvia Zoellin, Sunny Haight, Kevin Tate, Bob Janssen, Mike Alcorn, Gary Giboney, Anusha Ignatius, Cynthia Alcalá-Sy, Michael Bolinger, Annette Vesely
FIN Task Prioritization Review Meeting	Every Thursday	Cynthia Alcalá-Sy, Annette Vesely, Anusha Ignatius, Michelle Karim, Usha Talabhaktula, Burcu Mousa
Daily Scrum Meeting (HRM)	Daily	Michelle Karim, Kim Moore, Patsy Girard, Idalia Ow, Paulette Clark, Maria Partido, Arturo Roque, Sylvia Zoellin, Sunny Haight, Kevin Tate, Bob Janssen, Mike Alcorn, Gary Giboney, Anusha Ignatius, Cynthia Alcalá-Sy, Michael Bolinger, Annette Vesely
CGI Issue Status Review Meeting	FIN/PB – Wednesday HRM - Thursday	Michelle Karim, Kim Moore, Patsy Girard, Idalia Ow, Paulette Clark, Maria Partido, Arturo Roque, Sylvia Zoellin, Sunny Haight, Kevin Tate, Bob Janssen, Mike Alcorn, Gary Giboney, Anusha Ignatius, Cynthia Alcalá-Sy, Michael Bolinger, Annette Vesely, Becky Gong