RMDZ Zone Information Reporting System ZIRS Training -> February 2011

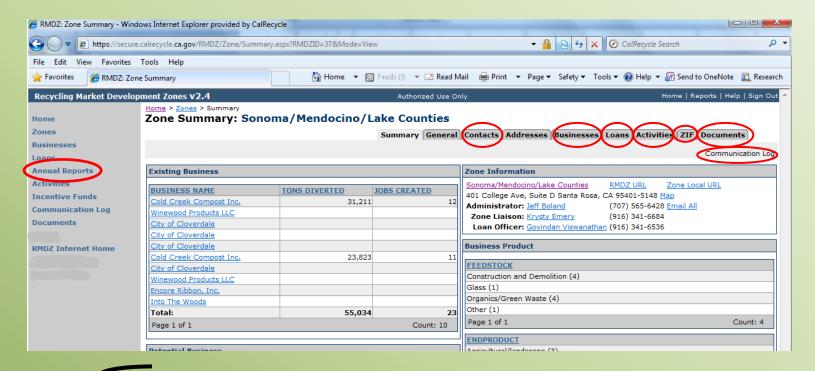


ZIRS Highlights

- Accomplishments and Upcoming Features
- Helpful Guidance
- Step Thru ZIRS Functions
 - ZIF Process / ZAP Process
 - Business Contacts / Communication Log
 - ZAR Overview
- Break Out Session & Feedback



RMDZ ZIRS Training -> ZIRS Highlights-> What is in ZIRS?



- Zone Headquarters Data and Contacts
- Business Contacts, Assistance Tracking, and Tons & Jobs Data
- Loan Data
- ZAP = Zone Activity Plans Online Forms & Tracking
- ZIF = Zone Incentive Fund Online Forms & Tracking
- Communication Logs & Documents
- ZAR = Zone Annual Reports





RMDZ ZIRS Training -> Accomplishments and Upcoming Features

Accomplishments

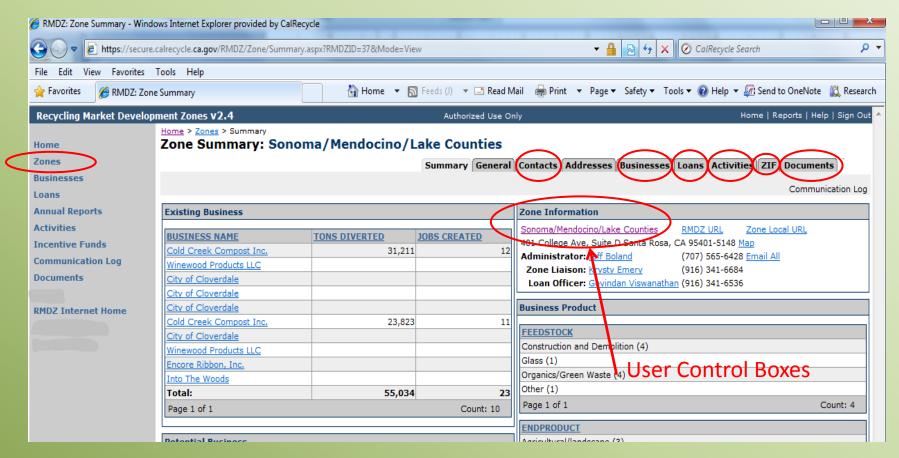
- Over 165 Updates and Fixes!
 - "Tons Jobs Assistance" No tons or jobs required. Only year, so you can fill in tons, or jobs, or assistance
- Streamlined Coordination Between LAMD and our IT Departments for more efficient fixes and future updates.
- External RMDZ Web Page Zone Contacts are updated by thru ZIRS

Upcoming Features

- User Manuals: ZAR Manual, ZIF Manual, Log-In Manual
- Online Biz Intake Form
- Revised Annual Report Print Layout
- Business List Current Status or "Dashboard" View
- Over 90 Fixes and Enhancements logged on Wishlist to be considered



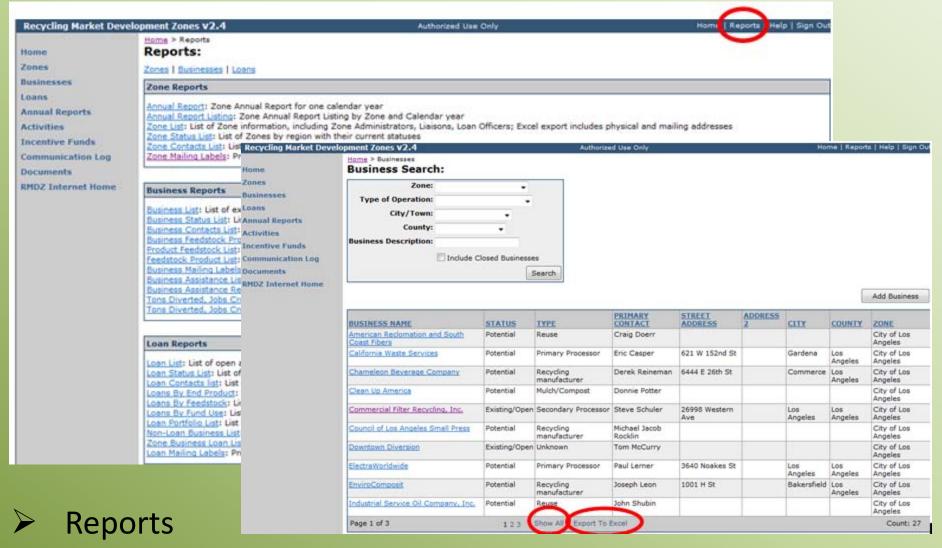
RMDZ ZIRS Training -> Helpful Guidance -> Zone Tabs and User Controls



- Stay in Zone tabs
- User control boxes can be found on all pages
 User control boxes take you immediately back to your Zone Summary Page



RMDZ ZIRS Training -> Helpful Guidance -> Reports, Show All & Export



"Show All" & "Export to Excel" at the bottom of most lists



RMDZ ZIRS Training -> ZIF Process -> ZIF Pre-Quiz

1. A Zone Administrator (ZA) ______ a ZIF for Preapproval and Approval.

a) Submits

- Circle One
- b) Recommends
- c) <u>Pre-approves/Approves</u>
- 2. A Zone Liaison (ZL) ______ a ZIF for Preapproval and Approval.
 - a) <u>Submits</u>
 - Circle One
- b) Recommends
- c) Pre-approves/Approves
- 3. A ZIF Coordinator (Mitch): _____
 - Circle One
- a) <u>Submits</u>b) <u>Recommends</u>
- c) Pre-approves/Approves





RMDZ ZIRS Training -> ZIF Process -> Instructions at a Glance

Phase 1: ZIF Activity "PreApproval"

- **Step 1:** ZA drafts ZIF PreApproval Request in <u>ZIF Request Tab</u>
 - (ie asks permission to conduct activity to spend money.)
 - ZA sets status to Pending if they want to save a draft only.
- **Step 2:** ZA Submits ZIF Preapproval in <u>ZIF Request Tab</u>.
 - ZA sets ZIF status to "Submitted for Preapproval"
 - ZIRS automatically notifies ZL via e-mail
- **Step 3:** ZL checks a ZIF in the <u>Summary Tab</u>.
 - A ZL "Recommends for Preapproval" in the <u>ZIF Review Tab</u>, edits the status, and adds any comments, or works with ZA to address any issues.
 - ZIRS automatically notifies ZIF Coordinator via e-mail
- **Step 4:** ZIF Coord "PreApproves" after review in the <u>ZIF Approval Tab</u>.



RMDZ ZIRS Training -> ZIF Process -> Instructions at a Glance Cont.

Interim Phase: ZA conducts activity and incurs expenses.

Phase 2: Invoice "Approval"

Step 5a: ZA works with ZL to prepare backup: ZIF Invoice; Vendor Data Record; Backup Receipts.

Step 5b: ZA Submits a request for payment approval in the <u>ZIF Request Tab</u>.

- ZA updates any Request form fields or data and attach docs to ZIF,
- ZA sets status to "Submit for Approval"

Step 6: ZL reviews request for payment approval and backup docs.

- A ZL "Recommends Approval" by updating status in the ZIF Review Tab
- If any adjustments are needed, ZL works with ZA to finalize until acceptable for "Recommend Approval"
- **Step 7:** ZIF Coordinator reviews payment approval and backup docs.
 - ZIF Coordinator "Approves" in the ZIF Approval Tab

Step 8: CSUS processes payment.



RMDZ ZIRS Training -> ZIF Process -> Process Flow Diagram

Request Review (ZA/ZL use only (ZL use only to to Submit) Recommend) Tabs in ZIRS -Inside an open ZIF (This is the only tab the ZA ever edit. A ZL may use the should ever edit. A ZL may also use this tab, but only to help a create a ZIF request.) ZA create a ZIF request.) No action required Step 1 (ZA or ZL Only)

Drop Down Option:

Pending

the ZL staff.)

(This is the only tab the ZL should Request Tab, but only to help a ZA

Approval (ZIF Coord use only To PreApprove and Approve)

(The Approval Tab and the Payment Tab are the only tabs the ZIF Coordinator should ever edit.)

Payment (ZIF Coord use only)

(The Approval Tab and the Payment Tab are the only tabs the ZIF Coordinator should ever edit)

ZIF Activity PreApproval Process Row

(This row is the ZA asking for permission to spend money)

Step 2 (ZA or ZL Only) Drop Down Option: Submitted for PreApproval

(This option is if a ZA drafts and saves a ZIF but does not vet want to submit it for preapproval to

(This step the ZA creates a ZIF and Submits for PreApproval)

ZIRS generates e-mail to ZL upon save.

Step 3 (ZL only)

Drop Down Option: Recommended for PreAppoval

(This step the ZL reviews and Recommends for PreApproval)

ZIRS generates e-mail to ZA and ZIF Coordinator upon save.

No action required

Step 4 (ZIF Coord Only) **Drop Down Option:** PreApproved

(This step the ZIF Coord reviews and PreApproves)

ZIRS generates e-mail to ZA and ZL upon save.

No action required

No action required

Drop Down Option Reads: Waiting Approval

Invoice Approval Process Row

(This row is the ZA asking for payment of the money after the activity has been completed)

Step 5 (ZA or ZL Only)

Drop Down Option: Submitted for Approval

(This step the ZA Submits for Approval for payment)(Also need to send backup to ZL: ZIF Invoice, Payee Data Record and Vendor Receipt)

ZIRS generates e-mail to ZL upon save.

Step 6 (ZL only) **Drop Down Option:** Recommended for Approval

(This step the ZL reviews and Recommends for Approval for pavment. ZL& ZA send joint emails with backup to ZIF Coord.)

ZIRS generates e-mail to ZA and ZIF Coordinator upon save.

Step 7 (ZIF Coord Only)

Drop Down Option: Approved or Denied

(This step the ZIF Coord reviews and Approves for payment)

ZIRS generates e-mail to ZA ZL and CSUS upon save.

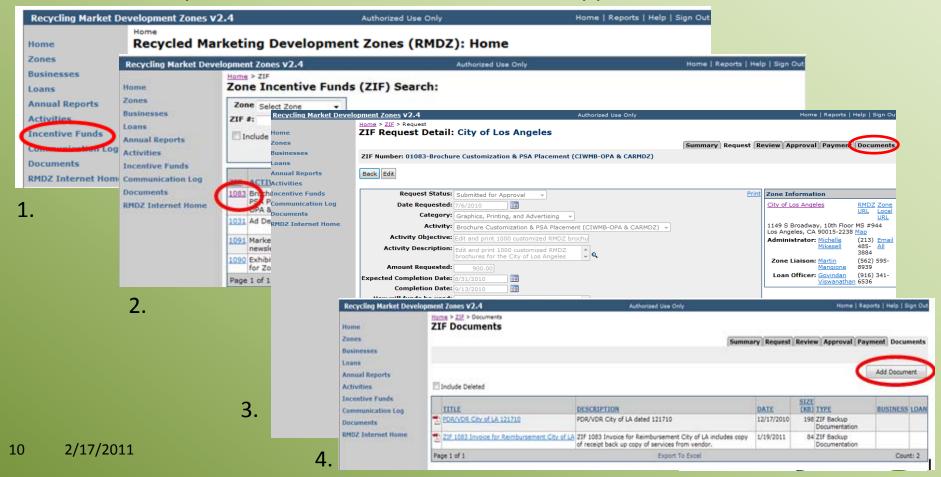
Step 8 (ZIF Coord/CSUS Only)

Drop Down Option: In Process or Paid

ZIRS generates e-mail to ZA, ZL, ZIF Coord upon saye.

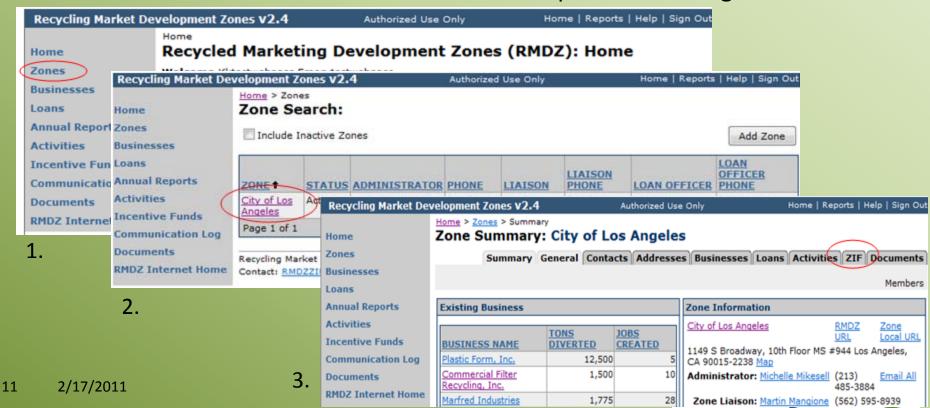
RMDZ ZIRS Training -> ZIF Process -> Adding Docs to ZIF

- 1. Click "Incentive Funds" on Left Grey Navigation Bar
- 2. Click your desired ZIF
- Click "Documents" Tab
- 4. Click "Add Document", complete form, and Save
 - Only Documents related to this ZIF will appear in this location

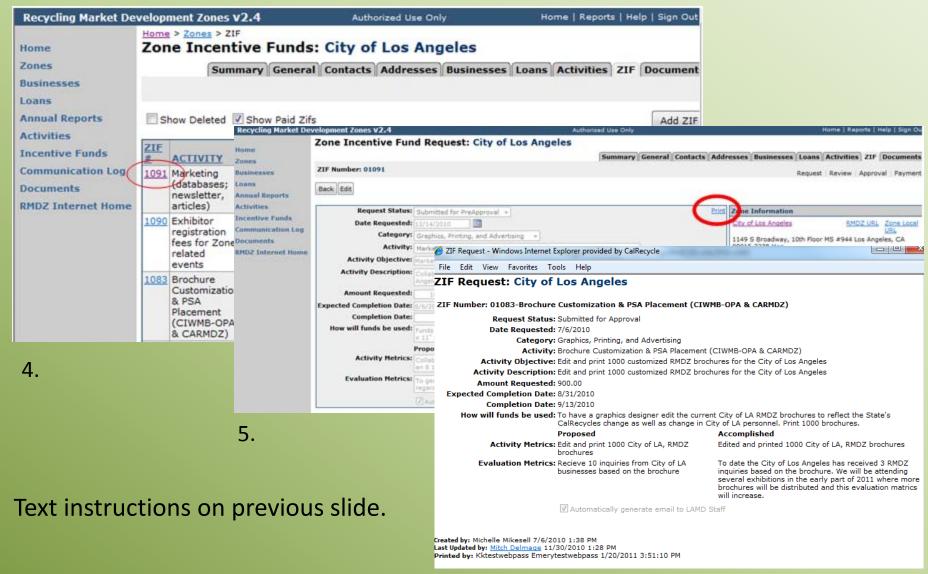


RMDZ ZIRS Training -> ZIF Process -> New ZIF Print Feature Instructions

- 1. Click "Zone" on Left Navigation Bar
- 2. Click you Zone Link
- 3. Click the ZIF Tab
- 4. Click your desired ZIF. ZIF Request Page will appear. (screen shot next slide)
- 5. Click small "Print" link located in the Request Tab (screen shot next slide)
- 6. New screen with printable ZIF will appear, (screen shot next slide)
 and can be printed showing all text in ZIF



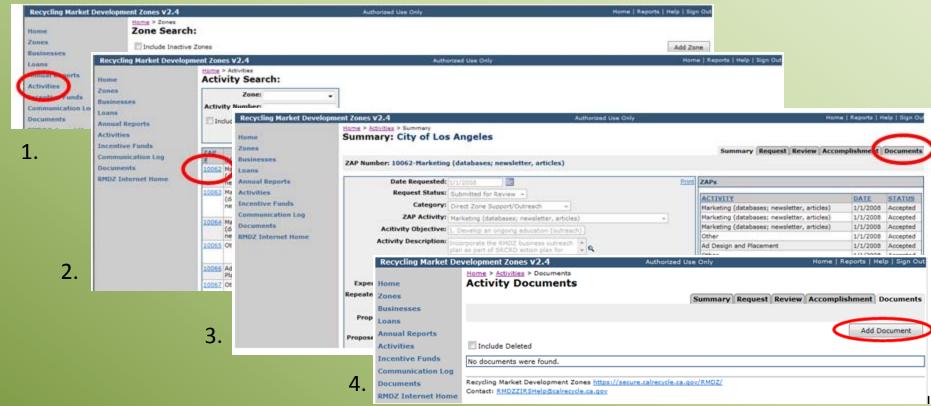
RMDZ ZIRS Training -> ZIF Process -> New ZIF Print Feature Continued





RMDZ ZIRS Training -> ZAP Process -> Adding Docs to ZAPs

- 1. Click "Activities" on Left Grey Navigation Bar
- Click your desired Activity/ZAP
- 3. Click "Documents" Tab
- 4. Click "Add Document", complete form, and Save
 - Only Documents related to this ZAP will appear in this location



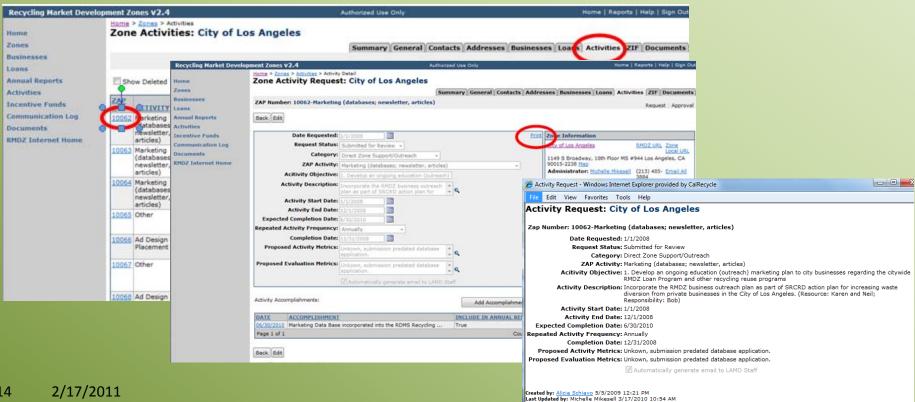


RMDZ ZIRS Training -> ZAP Process -> New ZAP Print Feature Instructions

- Click "Zone" on Left Navigation Bar
- Click your Zone Link
- Click the Activities (ZAP) Tab
- Click your desired ZAP. ZAP Request Page will appear.
- Click small "Print" link located in the Request Tab
- New screen with printable ZAP will appear,

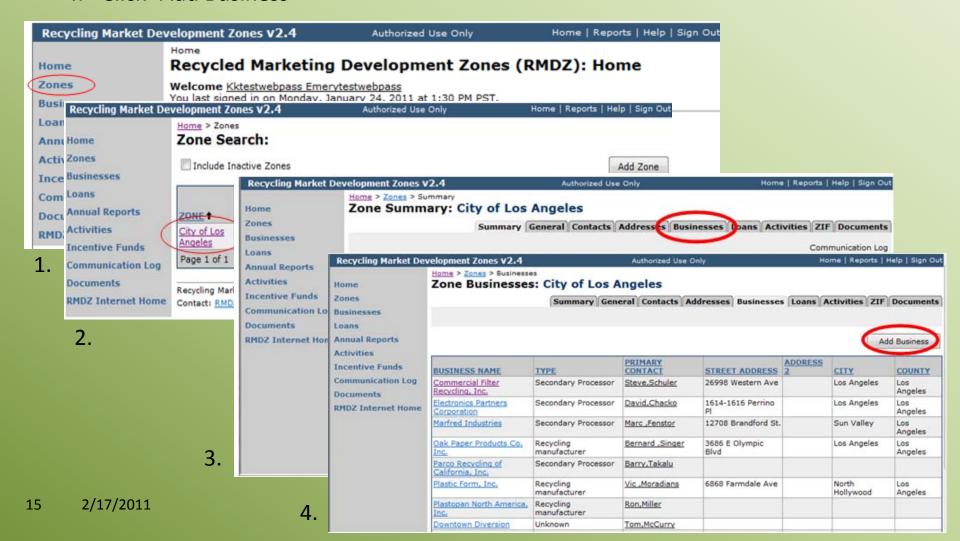
and can be printed showing all text in ZAP

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RMDZ ZIRS Training -> Business Contacts -> Adding a New Business

- 1. Click "Zone" in Left Grey Navigation Bar
- 2. Click your Zone link
- Click Business Tab
- 4. Click "Add Business"



RMDZ ZIRS Training -> Business Contacts -> Adding a Biz Contact Name

- 1. Same first two steps as previous slide
 - Click "Zone" in Left Grey Navigation Bar, then Click your Zone link
- Click Business Tab
- 3. Click the Business link you want to add a contact to
 - A new set of business specific tabs will replace the existing zone tabs
 as you enter the business area
- 4. Now, click the Contacts tab
- Click the "Add Contact"



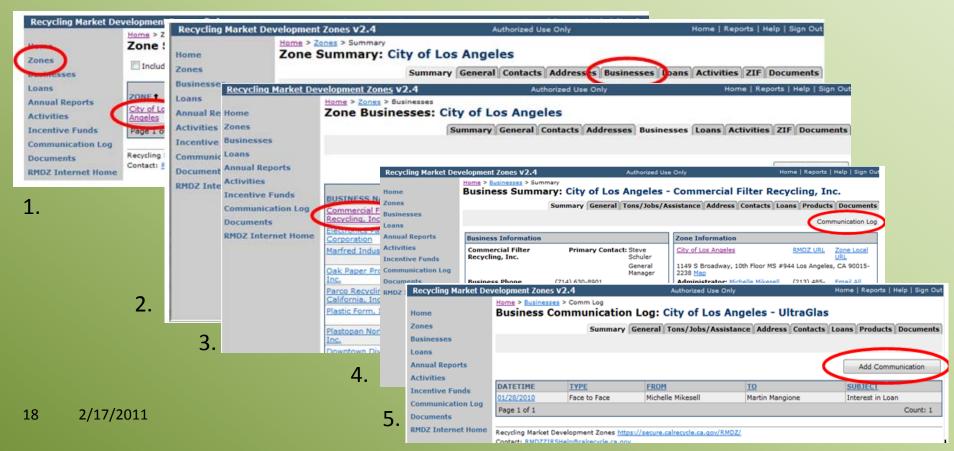
RMDZ ZIRS Training -> Communication Logs -> Zone Communication

- Click "Zone" in Left Grey Navigation Bar
- 2. Click your Zone link
- 3. Click Communication Log Black Text below the Document's Tab
- 4. This will show you all ist of all your Zone Communications, And provide you with an "Add Communication" Button



RMDZ ZIRS Training -> Communication Logs -> Business Communication

- 1. Same first two steps above
 - Click "Zone" in Left Grey Navigation Bar, then Click your Zone link
- Click Business Tab
- 3. Click the Business you want to add a Communication
- 4. Click the Communication Log Black Text below the Document's Tab
- 5. This will show you al list of all your Communications Specific to that business, And provide you with an "Add Communication" Button



RMDZ ZIRS Training -> Zone Annual Report (ZAR) Overview

- > 2010 ZAR is due Tuesday, March 1, 2011
- Reminder notice with summary instructions and report requirements sent from Krysty Emery, on Wednesday, January 05, 2011 10:45 AM
- > Another reminder with the a new full ZAR Manual will be sent after Zoneworks.
- > The new ZAR Manual will also available in ZIRS in Left Grey Nav Bar "Documents".
- Reminder about Reporting Process !! Verify FIRST then report!!
 - Review and input all data first, THEN capture that data in an annual report
 - Report Print option available via top blue ribbon on the right, under Reports
- A Tons Jobs Survey Letter Template is available for your use, and will be circulated via e-mail, and be available in the ZIRS Documents.



RMDZ ZIRS Training -> Contacts

Contact your ZL first for any Zone or ZIRS questions.

ZLs will contact Krysty Emery for ZIRS User Application issues. (916) 341-6684

Krysty.emery@calrecycle.ca.gov

Krysty will get back to both the ZL and the ZA usually in a cc:ed e-mail or coordinated phone call.

