Advantage 4 Steering Committee Meeting
February 25, 2022 – 8:30am

Participants:
    Auditor Racines
    Deputy Auditor Trautwein
    Kris Quick, Payroll Manager – Auditor's Office
    Kat Jaber, Payroll Education Coordinator – Auditor's Office
    Jerry Rief, Technology Division Manager – Auditor's Office
    Christian Dorr, Senior Technology Analyst – Auditor's Office
    Erin Benskin, Accounting Division Manager – Auditor's Office
    Ted Robinette, Principal Account – Auditor's Office
    Adam Grant, Fiscal Division Manager – Auditor's Office
    Amy Grenfell, Chief Operating Officer – Wyoming Business Council
    Lyndsay Orr, Accounting Manager – Wyoming Business Council
    Robin Cooley, Director – Department of Workforce Services
    Christina Merritt, Deputy Chief Financial Officer - Department of Workforce Services
    Robin Martin, Chief Financial Officer – Department of Workforce Services
    Korin Schmidt, Director – Department of Family Services
    Colleen Quinn, Chief Financial Officer – Department of Family Services
    Daniel Kelly, Director-Technology and Solutions, CGI
    Danna Westcott, Representative of Advantage Project - CGI
    Matt Eckel, Transition Manager - CGI
    Pamela Given, Transition Manager - CGI
    Dawn Williams, Deputy State Treasurer
    Tricia Bach, Director – Department of Administration & Information
    Jared Hanson, Human Resources Program Supervisor – Department of Administration & Information
    Rory Horsley, Chief Financial Officer – Department of Administration & Information/Accounting
    Trent Carroll, Chief Operations Officer – Department of Education
    David Ray, Fiscal Manager – Water Development
    Renny MacKay, Policy Director – Governor's Office
    Craig Spradling, Accounting Manager – Department of Health
    Rebecca Zisch, Executive Director – Real Estate Commission

        Auditor Racines began the meeting thanking those that attended, and letting them
know she is respectful of their other obligations. She recognizes the timing of this meeting is
not ideal with the Legislative Session. She introduced three new members to the Steering
Committee. The new members are:

Bill Vajda, Chief Information Officer – Enterprise Technology Services
Chad Auer, Deputy Superintendent of Public Instruction
Rory Horsley, Chief Financial Officer – Department of Administration & Information/Accounting

For the benefit of the new members, she gave an overview of the purpose of these meetings: The Steering Committee was formed to provide updates and gather input from the stakeholders about the status of the upgrade project. The upgrade focuses on upgrading the State of Wyoming's Enterprise Resource Planning System, which consists of three components – the Wyoming Online Financial System or WOLFS, Human Resource Management or HRM and infoAdvantage, the reporting component, from version 3.11 to 4.0. The new version is tentatively set to go live in March, 2023.

This Committee is designed to meet monthly, and minutes are sent out. Don't worry if you have to miss a meeting. Minutes from the last meeting, which was held on January 28th, were sent out on the 31st of January. Eydie Trautwein, who is the Deputy Auditor, also sent them out again this week. Please let the Auditor's Office know if you would like them re-sent to you our any of your staff.

To recap from the last meeting, we discussed the project timeline and focus. The Auditor stated this is a face-lift of the system, whereas the business process, infoAdvantage and the underlying structure of the system will not change. We introduced you to CGI staff. CGI is the vendor that supports this system. Information about project deliverables was provided, such as updates on the project plan, training and testing plans. We're still on schedule regarding the delivery of testing environments and configurations of main home pages.

The big event that happened since the last meeting, which was about one month ago, were agency demonstrations. This last month our staff hosted and conducted 13 agency demonstrations to show them the new system, which focused on four home pages, which were employee, manager, accounting and HR. Those, by and large, went very well.   The Auditor attended a few demonstrations and thought they went very well. She thanked all those that participated. A lot of good feedback has been received, and we are currently incorporating feedback from the demonstrations into configuration of the system. Kris Quick did an excellent job of showing off the system. Please contact the Auditor's Office if you would like additional demonstrations. They only last about 30 minutes and they are very helpful.

At the last meeting Kris Quick also showed you a piece of the system, and if there is time at the end of this meeting, he will do that again and show you some additional functionality.

There were two new CGI representatives in attendance. Danna Westcott has joined the upgrade team. Ms. Westcott has been with CGI for approximately ten years. Nine of those ten years have been working with the Advantage product in some capacity, starting with infrastructure and then moving through to her current role. Matt Eckel is a Transition Manager at CGI. He has a background in technology management. He has been with CGI for approximately six months.

Eydie Trautwein shared a PowerPoint. She thought it would be best to put the information in a visual format to refresh everyone's memory of some of the timelines.   A lot of last month was spent on agency system demonstrations. If additional demonstrations are needed, please contact the Auditor's Office. Ms. Trautwein also wanted to refresh everyone's memory about the structure of the Steering Committee. Today the main Steering Committee is meeting. Most of the members are comprised of agency directors, CFOs and high level staff. The structure was to hold Steering Committee meetings monthly, but then to begin breaking into subcommittees as we start working on the upgrade. The plan is to have three subcommittees:

Configuration and Training Subcommittee will launch in March

Communication and Outreach Subcommittee will launch in April

Technical Subcommittee will launch in May

The Configuration and Training Subcommittee is ready to be launched. Unfortunately, there have not been a lot of volunteers. If you have interested staff that would like to participate, contact Kris Quick in the Auditor's Office. The plan is to launch this Committee in March. Kris Quick will be sending out another email today asking for volunteers. That also gives your staff an opportunity to be on the frontend as we are building.

Ms. Trautwein gave a high level overview of the upgrade timeline. In October – December there were preliminary issues (contract negotiations, internal project kickoff, agency briefings, protocol environment was received from CGI and we did internal familiarization

trainings with staff). In January we had our first Steering Committee meeting. We developed and finalized our project plan and we developed our training plan. Now we are in February and would like to focus on the training plan that was developed. We will also be developing our testing plan, which we will present to you in March. In March we will be developing our Communication and Outreach Plan and sharing with the Committee in April. We will begin to get on a routine as we develop something internally and then present it to the Committee. We will be starting some user acceptance testing in August and then go live in March of 2023.

The Auditor's Staff has spent a lot of time on training. This was one of the issues during the last upgrade – there wasn't enough training available when it went live in October of 2018. We have spent a lot of time internally thinking about how our training plan will look and how it will fold out. We are happy to share the complete training plan with you, but we thought you should be aware of some of these dates. The plan is to update all our existing handbooks in April – July (WOLFS, Payroll and any of the training materials and guides we have). In August - February we will be doing user acceptance testing. We are going to leverage this as a training opportunity as well. When we ask your agency staff to come in and help us with this, they will be handed a new training guide. That process will be to test the system but also to serve as a training opportunity. In October – January we will be creating and publishing online videos, finalizing virtual and in person training sessions and materials. In January we will open up registration for in person and virtual trainings and as we get use to the system we will make sure we offer lots of additional in person and virtual training.

We have really focused on several key components. Here are some of the highlights from the training plan:

Recognizing that we have a lot of different users in the system. We have different populations we need to train. All state employees have to use our system to get into ESS, including retirees. We might need to train them very differently as opposed to state employees. The different populations we identified were, or course, the employees, WOLF Users, and HRM Users. As we thought about training methods, we really started anticipating who we needed to partner with to deliver successful trainings. When we are training on the HRM portions, we will be partnering very closely with HRD. We also recognized that people learn differently and so we are offering a variety of methods to access training – online videos, virtual training, in person training. We will be updating the paper materials – training guides, handbooks. We will have sessions for people that need to talk it out and want to come and

meet with Kat Jaber, Kris Quick, Adam Grant or Leesha McIntire one-on-one. Continuous communication will start in the next few months. We thought a lot about timing of the training – trying to be strategic about when we do offer the training and what it will look like. Our hope is when you send agency staff to help us test, that we develop agency mentors so within each agency you may have an expert who helps test and can then train other staff in your agency. We are a big proponent of evaluations. We will have an evaluation process so we know how we can continually improve.

Kris Quick, who is the Project Manager, will now show what timesheets look like. He shared his screen. He is showing the employee profile on the demo. Opening a timesheet is easy. If you click the quick link, it opens up automatically. It is a lot easier to navigate. He edited the timesheet to show some additional functionality. It looks a lot different than 3.11. Currently in 3.11 the timesheet in ESS and MSS look different. The nice part about Advantage 4 is they all look the same. Everyone sees the same screen and the same information. They have additional add-ons, such as freezing a panel. The summary feature has also been added. This basically summarizes everything entered so you're not having to scroll. It gives you a summarized view of the information. It still has all the information such as daily activity and total hours. Overall, the timesheet is cleaner looking and has a lot more functionality that will be beneficial.

The Auditor again asked for participation in the subcommittees. She realizes it's time consuming. But it will really help this project. If nobody participates in the subcommittees, we will be guessing at what everyone wants. Sign up for a subcommittee.

Tricia Bach thanked the Auditor for setting everything up. She said it all seems very organized, and she knows a lot of work has been put into it.

The Auditor asked if we should rebrand the system as we go through this process? It's been called WOLFS for a long time, but that also creates a lot of confusion because WOLFS does not encompass the entire system. We do not need to change it, but if you have any ideas, please submit them.

Eydie Trautwein reminded the Committee that the next meeting will be March 25, 2022.