

Advantage 4 Steering Committee Meeting
March 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
Christian Dorr, Senior Technology Analyst – Auditor’s Office
Erin Benskin, Accounting Division Manager – Auditor’s Office
Ted Robinette, Principal Account – Auditor’s Office
Amy Grenfell, Chief Operating Officer – Wyoming Business Council
Lyndsay Orr, Accounting Manager – Wyoming Business Council
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
Danna Westcott, Technology & Solutions - CGI
Matt Eckel, Transition Manager - CGI
Pamela Given, Transition Manager - CGI
Dawn Williams, Deputy State Treasurer
Kevin Hibbard, Director – State Budget Department
Erin Williams, HRD Administrator – Department of Administration & Information
Jared Hanson, Human Resources Program Supervisor – Department of Administration & Information
Trent Carroll, Chief Operations Officer – Department of Education
David Ray, Fiscal Manager – Water Development
Renny MacKay, Policy Director – Governor’s Office
Rebecca Zisch, Executive Director – Real Estate Commission
Claire Smith, Chief Fiscal Officer - Wyoming Supreme Court
Bob Nicholas, Wyoming House of Representatives
Elizabeth Martineau, Fiscal Analyst – Legislative Service Office
Eric McVicker, Chief Financial Officer – Department of Health

Auditor Racines began the meeting by welcoming all those in attendance. She indicated this is the third State Auditor’s Office Advantage 4 Steering Committee meeting. She also gave a quick overview of the purpose of these meetings. She stated this Steering Committee was formed to provide updates and gather input about the status of the upgrade project. The upgrade focuses on the State of Wyoming’s Enterprise Resource Planning (ERP) system, which consists of three parts: the Wyoming Online Financial System (WOLFS), Human Resource Management (HRM) and infoAdvantage. A transition is being made from version 3.11 to version 4.0. WOLFS is the financial component of the ERP system. HRM is the human resource

management and payroll component and infoAdvantage is the reporting component. The new version is tentatively set to go-live in March of 2023 – approximately one year from now.

The Auditor also explained that this Committee meets monthly and sends out minutes of each meeting. The last meeting was held on February 25th. If you did not receive minutes, please contact the Auditor's Office. She gave a brief recap of the February 25th meeting in which she stated that Danna Westcott and Matt Eckel, CGI representatives, were introduced. CGI is the vendor for the system. Also, agency demonstrations were conducted between January 31st and February 11th – for a total of 13+ demonstrations. These demonstrations were very successful. At the February 25th meeting, Eydie Trautwein presented a PowerPoint presentation that included information about the project and the training plan was discussed. The training plan was the major event from that meeting. Internal work that the Auditor's Office is conducting was also discussed as well as the launch of three subcommittees. Kris Quick gave a demonstration of the new system which focused on the "employee" homepage and timesheets. Members were asked if they would like to change the name of the system.

Today, Eydie Trautwein shared another PowerPoint with the Committee. She discussed some of the events that happened the past month and also discussed where we are headed in the next few months. The presentation she gave was entitled "Advantage 4 Steering Committee Updates – March, 2022." To refresh the Committee about the structure of the Steering Committee – this Committee meets monthly and there are also three separate subcommittees. The Configuration and Training Subcommittee launched in March and had their first meeting. Members of the Steering Committee's staff participated. Kris Quick will give a detailed update of this meeting. The Communications and Outreach Subcommittee will be launching in April. The focus of that Committee is to develop and implement a plan, and make sure information is being communicated on all levels – all users, fiscal staff of the agencies and this Steering Committee. In May, the Technical Subcommittee will be launched. That is strategically planned in May as information will be received in April for some test environments – so in May we really need to test some of the technical aspects of the system – agency interfaces, some of the cycles. We will need your agency input from your technical staff on some of this.

Ms. Trautwein gave a quick review of the timeline. We are now in March – today we will be presenting the testing plan we developed and have received feedback and approval from CGI. We have developed our Communication and Outreach Plan. We have circulated that

Advantage 4 Steering Committee

March 25, 2022

Page Three

for internal review and will present it to the Steering Committee in April. We have launched the Configuration and Training Subcommittee and are now having our third Steering Committee meeting. The training plan was discussed at the last meeting. We have been developing subplans as part of the overall project plan. We have a very lengthy Advantage 4 Training Plan we can share. In April – July we will be updating existing handbooks and training materials. August – February – User Acceptance Testing – we will need help from the agencies to test the new system. October – January – we will create a lot of on-line materials that we will be sending out to the agencies (on-line video bursts and in-person and virtual training session material). In January, right before we go live, we will be opening registration for in-person and virtual training so everyone feels comfortable when the system goes live. In February – March we will conduct in-person and virtual trainings, office hours and labs, so people can come and make sure they feel comfortable.

At the last meeting we also discussed some key features of the training plan and tried to focus on recognition of different populations – WOLFS users, HRM users. We want to make sure we are offering a variety of training methods, recognizing people learn differently. We want to make sure the timing makes sense and make sure we have a training evaluation component.

The new information we will discuss today is a review of our testing plan. Again, we developed a very lengthy document. It discusses how we need to move forward to make sure that testing occurs in a way that there are no bugs and we have a successful launch in March of 2023. Ms. Trautwein is happy to share this plan with everyone. When the Communication Subcommittee launches, there will be a dedicated webpage on our website for posting these plans too.

An overview of the testing plan was discussed. Currently, internally, the Auditor's Office has been focused on IST testing (Integrated System Testing). We have been updating and reviewing all of the test scripts that were used for the 3.11 upgrade. Just to give you an idea, we developed over 325 separate and independent testing scripts for all components of the system. That happened in March. In April and May, we will be finalizing those test scripts and really focusing on the 13 customizations that CGI is making sure are included in the new system. In May and June, we will be doing general and internal testing – looking at some of the forms, focusing on the last few customizations. In July – August, there will be general testing, and again, more focus on customizations. In August – September there will be general testing and

Advantage 4 Steering Committee

March 25, 2022

Page Four

we will really be hitting a lot of the infoAdvantage reports. In August – January there will be UAT testing (User Acceptance Training) and then release of an external testing schedule. We will need the staff of the Steering Committee probably in August, September, October and November to test the system. In January through February we will be doing another round of UAT training. In February – March we will do HelpDesk and Operations testing. We want to have our HelpDesk ready when we get calls from users. In April – January we will be moving forward. The plan is that CGI will be periodically delivering containers of new codes to us. We will constantly be testing these containers and have a plan in place to make sure any new patches or codes work. That is something this Steering Committee won't be a part of. The Auditor's Office will have schedules and processes and procedures in place to make sure we are adequately testing containers.

CGI will be delivering our first testing environment on April 1. We will receive the second testing environment in mid-April. The third (infoAdvantage) in May. Once everything is tested and ready, we will be getting our production environment.

Eydie Trautwein explained the structure of the Committee. The Training Subcommittee met in March. They had two meetings. They had a great idea to split the Subcommittee into subject matters. One focuses on payroll and the other focuses on fiscal.

Kris Quick, the Project Manager for this upgrade, stated there were two Subcommittee meetings during March. They went very well. Each Committee had approximately 10-15 employees attend. Mr. Quick thanked everyone for allowing their employees to attend. He stated the more participation we get, the better the meetings will go, and the more feedback we get will help build a stronger environment. There was a lot of participation from the attendees. They have identified 23 different business and home pages. This can always change as we move through the project. There was discussion in the Subcommittee about the general plan for the home pages. The next meeting will be on April 15th.

Eydie Trautwein stated that now we will begin to get into a normal cycle as those subcommittees launch, and you will be hearing more from them.

Kris Quick gave a demonstration of functions of the new system that included single log in capabilities, search functions and the ability to produce training videos. He showed what the 3.11 ESS portal and Financial portal look like. They aren't very user friendly. The HRM system is

Advantage 4 Steering Committee

March 25, 2022

Page Five

similar to the Financial system. It's not user friendly either. The nice part about 4.0, as soon as you log in, you have access to everything you had in the 3.11 three portals. That is the main benefit – one log-in to get to everything. There is also a built-in single search bar at the top. Videos can also be embedded into the system for training purposes.

Eydie Trautwein stated they have gone through the existing 3.11 system and pulled out all the top transactions that everyone uses (GAX, IETs). We are currently working with CGI to mock up new documents for those top 15. Those documents will be configured April 5 and will be in the test environment. When the subcommittees meet, they can begin to look at them.

Auditor Racines again thanked all those that attended. She stated that our focus is over communication. She wants to keep the communication flowing and doesn't want any surprises.

The next Steering Committee will be April 29th at 8:30am.