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 Accountant – Auditor's Office

Leesha McIntire, Principal Accountant – Auditor's Office

Amy Grenfell, Chief Operating Officer – Wyoming Business Council

Lyndsay Orr, Accounting Manager – Wyoming Business Council

Robin Martin, Chief Financial Officer – Department of Workforce Services

Korin Schmidt, Director – Department of Family Services

Pamela Given, Transition Manager - CGI

Dawn Williams, Deputy State Treasurer

Katie Smith, Administrator of Financial Accounting – Treasurer's Office

Kevin Hibbard, Director – State Budget Department

Erin Williams, HRD Administrator – Department of Administration & Information

Jared Hanson, Human Resources Program Supervisor – Department of Administration & Information

Bill Vajda, Chief Information Officer – Enterprise Technology Services

Renny MacKay, Policy Director – Governor's Office

Rebecca Zisch, Executive Director – Real Estate Commission

Claire Smith, Chief Fiscal Officer - Wyoming Supreme Court

Eric McVicker, Chief Financial Officer – Department of Health

Don Richards, Budget & Fiscal Administrator – Legislative Service Office

Craig Spradlin, Accounting Manager – Department of Health

Auditor Racines began the meeting by thanking everyone in attendance for participating. She indicated this is the 4th State Auditor's Office Advantage 4 Steering Committee meeting. She stated she hopes everyone is enjoying these short meetings with updated information that ends on time. She gave a quick overview of the purpose of this meeting. She stated it may be somewhat repetitive, but there are different attendees at each meeting, so she will give an overview at the beginning of every meeting. She stated this Steering Committee was formed to provide updates and gather input about the status of the upgrade project. The upgrade is for 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. The upgrade is from version 3.11 to version 4.0.

This Committee meets monthly and sends out minutes of each meeting. The last meeting was held on March 25th. Those minutes were sent out on April 4th. The Auditor's Office is going to begin posting minutes on their website. To recap from the last meeting - Eydie Trautwein presented a PowerPoint presentation that included a refresher on the project and training plan. The major point about the last meeting was a testing plan was presented. There was also discussion about the internal work that was completed regarding configuration of home pages and documents. At the March 25th meeting, Kris Quick also gave an update regarding the Configuration and Training Subcommittee, and gave a demonstration of the new system, showing the single log-in feature, google search functions and embedded videos.

At today's meeting, Eydie Trautwein shared another PowerPoint with the Committee, which discussed the April 2022 updates. She gave a little background of the structure. The Steering Committee is what everyone is attending now. There are three subcommittees: Configuration and Training, Communications and Outreach and Technical. The Configuration and Training Subcommittee has been meeting for approximately two months. They have split into two groups. There was a plan to launch the Communications and Outreach Subcommittee in April, but that has been pushed back to May. The Technical Subcommittee will probably launch in May too. There has been a lot of behind the scene work happening with Jerry Rief and his staff to work on interfaces, relay boxes, etc. Once that information has been sorted out, the Technical Subcommittee will begin to pull in external members.

Eydie Trautwein discussed a timeline of the upgrade. She stated the Steering Committee met in January, February and March, and have completed all the activities associated with those months. Today, the Communication and Outreach Subcommittee will be discussed. A Communication and Outreach Plan will be presented. The first testing environment was received from CGI. Things are functioning very well. The applications are working great. They have completed a lot of the customizations, including some of the budget structures. The team is conducting IST (Integrated System Testing). Most of the scripts are done. Everything is going very well.

In April, a major plan was presented to begin training, testing and communication. Shorter updates will be provided. There won't be as many big items to present to the Committee after this month. The upgrade is scheduled to go live in March of 2023. In February

we presented the Training Plan, which is going very well. The staff is working on updating manuals. Eydie Trautwein thanked Kat Jaber and Leesha McIntire for all their work, and stated they are making a lot of progress. The schedule for User Acceptance Training has been set. All is well with the Training Plan. All deadlines are being met.

Some of the highlights discussed in February for the Training Plan included recognition of different populations (WOLF users and HRM users). Also highlighted was a variety of methods to train - such as online videos, manuals/handbooks, classroom sessions, one-on-one time, lab sessions and continuous communication. Timing was also discussed as well as training evaluations.

In March, the Testing Plan was looked at. All is on-track, and all deadlines are being met. The major event – IST Testing (Integrated System Testing) began, and is going very well.

Save the date – all agencies are needed to help with User Acceptance Training beginning in August. Specific dates have been set for Committee and Subcommittee members.

Today the Communication and Outreach Plan is being presented. The Auditor's Office has worked extensively with CGI. They provided helpful tips. The plan is broken down into four parts.

1.   Promotion
2.   Advertising
3.   Creation
4.   Execution

Eydie Trautwein is happy to share this plan with anyone. It is somewhat of a high level timeline of the Communication and Outreach Plan.

Promotion – consistently hold monthly meetings. Demonstrations have begun and emails will begin to be sent out to all users. Brace yourself – if communications haven't started with your agency fiscal teams, you may be receiving questions when the emails are sent out.

One item that has been completed to help with questions in the Auditor's Office was a dedicated page on their website for the Advantage 4 upgrade. Anyone can view it and understand what the Steering Committee has done and what is being planned.

In June – December, the advertising phase will begin. Emails will be sent out twice a month to users. A monthly newsletter will also be launched. Sneak peaks of the system will be offered – (small demos). Anyone can come to the Auditor's Training Lab and get a sneak peak of the testing environment. All of this will be happening before the User Acceptance Training to get users ready for what the new system looks like.

Promotion of the on-line video bursts will begin. They are small vides that explain different parts of the system.

Advertising Phase – Advertising of the User Acceptance Training will be launched in August, September, October and November.

Creation Phase – This will be the final User Acceptance Testing Opportunities. By then, all manuals will have been completed and a schedule for classes for 4.0 will be opened up. These classes will likely be very similar to the classes currently offered on a monthly basis for 3.11. They will just be trained on the new system. It is important after the Go-Live date to have six to eight months of training on the calendar for users to attend.

The last phase is Execution. In March, training will be offered and registration for classes. There will be training labs and training guides. There will probably be additional training materials needed for items not anticipated that aren't covered in the manuals. At that point, there will be quick reference guides released.

In March, everyone will know how to get in the system. There may be a change in User ID's – all of these logistics will be worked out. Helpdesk resources and procedures will be sent out.

Eydie Trautwein wanted to remind everyone that the Auditor's Office will be doing "dry runs" with the Helpdesks to make sure they are ready for potential calls.

On the Auditor's Office website, at the top there is a blue box with a page dedicated to the upgrade. All of the Steering Committee meeting minutes are posted. This page also contains key dates. There is also a notice stating if you would like a demo of the new system, to please contact the Auditor's Office. The website page was launched earlier than anticipated. The first communication to all users will go out next week. Please save the dates of August 17th and August 24th for User Acceptance Training for the Committee Members. The

Communication and Outreach Committee has been delayed. Eydie Trautwein will be reaching out to the Steering Committee Members for interest in joining the Communication and Outreach Committee. The first meeting should take place in May. The Technical Committee will be launched in May too.

Eydie Trautwein stated that the first testing environment received from CGI is working very well. The top highest volume of documents has been identified and CGI has completed configuration on them. They have been moved to the testing environment. Twenty-three home pages have been identified. Approximately ten have been completed. Training manuals are now being upgraded.

Kris Quick stated the Configuration and Training Subcommittee meetings have gone quite well. There has been a lot of great feedback, and he thanked all those that have participated. He stated at the last meeting he had just received the SH1 environment. They started building out the HR role, Accounting role and the Accounting Manager role. This was set up as a draft and presented at the Committee meeting. They walked through it to see what the pages looked like and what additions would be needed.

The left hand navigation panel is configurable for each business role available. Some will have more than others. If you look at the manager role, it is pretty well configured and has a lot of different tasks that can be viewed. The nice thing in 4.0 is the navigation panel will stay with you regardless of where you to throughout the system.

Kris Quick stated that besides the left hand navigation panel being discussed at the next Subcommittee meeting, they will also discuss documents that CGI has cleaned up as well as additional documents. On the financial side – there will be some changes on the vendor page. This page had a lot of information on it that wasn't used. It has been cleaned up. Also, VCC and VCN documents have been cleaned up. GAX documents have also been reconfigured and cleaned up so they only contain pertinent information that is needed. In 3.11 the tabs were on the left hand side. In 4.0 the tabs are now across the top. Also, templates have been created. If a monthly bill is paid, you can now add those to "favorites" instead of having to go to the document catalog and search for a template – you can just add it to your favorites and copy it for future use.

Eydie Trautwein once again reminded the Committee about the User Acceptance Training scheduled for August 17th and August 24th. The next Steering Committee is scheduled for May 27th.

Auditor Racines thanked everyone for attending, and asked for any member to provide feedback or reach out to her office with any questions.