ADVANTAGE 4 STEERING COMMITTEE UPDATES

MAY, 2022

STRUCTURE

STEERING COMMITTEE

| CONFIGURATION AND TRAINING SUBCOMMITTEE *MARCH* | COMMUNICATIONS AND OUTREACH SUBCOMMITTEE *JUNE* | TECHNICAL SUBCOMMITTEE *JUNE* |

ADVANTAGE 4 UPGRADE TIMELINE

October - December, 2021: Contract negotiations, project kick-off, agency briefings, prototype environment delivered, familiarization trainings conducted.

January: Project plan and schedule developed, training plan developed and first steering committee held.

February: Agency demonstrations held, presentation of training plan, testing plan developed, second steering committee meeting held.

March: Presentation of testing plan, communication and outreach plan developed, configuration and training subcommittee launch, third steering committee meeting held.

April: Communication and outreach subcommittee launch, presentation of the communication and outreach plan, delivery of test environment, Integrated System Testing (IST) testing begins.

May: Technical subcommittee launch, delivery of test environment [SH1 and SH2 – infoAdvantage in July].

August: User acceptance testing (UAT) and training begins (August – November)

January: Final end-use UAT and sign-off on system

March, 2023: "Go-live"

TRAINING PLAN

ADVANTAGE 4.0 TRAINING PLAN

INTRODUCTION

The Wyoming State Auditor's Office (SAO) is currently in the process of upgrading the State of Wyoming's uniform electronic accounting system. State of Wyoming employees, who are also users of the system, will need to be trained on how to use the upgraded system.

The current and upgraded system is comprised of three components: (1) WOLFS; (2) HRM; and (3) infoAdvantage. The financial component of the system is called WOLFS or the Wyoming Online Financial System. The human resource management and payroll component are called Human Resource Management (HRM) and infoAdvantage is the reporting component. WOLFS and infoAdvantage are supported by the SAO's financial division (FIN) and the HRM component is supported by the payroll division (Payroll). The accounting division supports various budgeting and reporting functions performed by the system.

There are approximately 800 WOLFS users, 215 HRM users and 950 infoAdvantage users. A majority of WOLFS users are employed by various state agencies and are decentralized. HRM users are centralized under one agency called the Department of Administration and Information (A&I). InfoAdvantage users are mixed, operating under both decentralized and centralized structures. The communication, training and evaluation approach outlined below for WOLFS users is intentionally more robust given the decentralized nature of the user population.

The upgraded system is scheduled to go-live in March, 2023. The general timelines for training activities are as follows:

April 2022 - July 2023 – Update existing handbooks and training materials

August 2022 - February 2023 – User Acceptance Testing (*Testers will be provided an updated handbook and test scripts in August*)

October 2022 - January 2023 – Create and publish on-line video bursts and finalize in-person and virtual training session materials (objectives, materials, outlines and training dates)

January 2023 – Open registration for in-person and virtual trainings

February 2023 – May 2023 – In-person and virtual trainings and office hours/labs

Below is detailed information that describes how the SAO plans to provide training to different and specific system users. Each approach listed below includes information about: (1) who is in charge of training which populations; (2) various training methods and content; (3) goals for each training activity; (4) specific timelines; (5) evaluation activities; and (6) risks and mitigation strategies.

April 2022 - July 2023 – Update existing handbooks and training materials

August 2022 - February 2023 – User Acceptance Testing (*Testers will be provided an updated handbook and test scripts in August*)

October 2022 - January 2023 – Create and publish on-line video bursts and finalize in-person and virtual training session materials (objectives, materials, outlines and training dates)

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TESTING PLAN

ADVANTAGE 4 TESTING PLAN

Background:

The Wyoming State Auditor's Office (SAO) is currently in the process of upgrading the State of Wyoming's uniform electronic accounting system from Advantage 3.11 to Advantage 4.0. This system is hosted and managed by CGI. The general Advantage 4.0 project schedule consists of three (3) phases that include: (1) "Align": establishing the foundation for sustaining the program; (2) "Build": activities for the iterative configuration and testing of Advantage 4.0; and (3) "Achieve": focusing on cutover activities including final readiness assessments. The new system will go live in March, 2023. A key component of the project and project plan is the testing strategy.

Below is a plan that describes the timeline and internal and external activities associated with testing the new system prior to go-live. A majority of the testing plan will be deployed during the "Build" phase with a bulk of the testing activities occurring between March, 2022 through September, 2022. Final testing and cutover will coincide during the "Achieve" phase.

Testing Strategy Summary and Timeline:

There are three (3) primary categories of testing that will occur during the project: (1) Integrated System Testing ("IST"); (2) User Acceptance Testing ("UAT"); and (3) Helpdesk and Operations Testing. IST testing activities will focus on end-to-end testing of the new system, including the testing of the following subcategories: (a) security and workflow; (b) business roles and processes (c) customizations; (d) interfaces; (e) forms; and (f) reports. Testing activities are dependent upon the delivery of and access to two (2) test environments provided by CGI: SH1 and SH2. SH1 (with infoAdvantage, which is the reporting component of the system) will be delivered in April and SH2 will be delivered in May. The information above summarizes the SAO's testing strategies, but it is important to note that CGI also has robust testing strategies in place, including CGI Unit and regression testing, which will occur prior to the delivery of containers and whenever a serious issues is identified by the State.

IST and UAT will be performed iteratively within each of the "Build" phase iterations. The general timeline for testing activities is as follows:

March, 2022 - September, 2022: IST Testing

March: Review and update of 3.11 test scripts and development of new 4.0 test scripts.

April/May: Finalization of test scripts. Testing of security and workflow, business roles and processes, interfaces and the following customizations: (1) new interface process; (2) WY Legal/Expense Budget Structure #110 & 120; (3) WY Revenue Budget Structure #121; (4) BFY in pages/tables with COA data; (5) LDPM Builder: (6) user defined pages (UICODE).

May/June: General testing and specifically the testing of forms and the following customizations: (1) Cost Allocation to Load Labor Hours as Statistics; (2) Labor Cost Distribution History Temporary (LCDHT) table.

March, 2022 - September, 2022: IST Testing
- *March:* Review and update of 3.11 test scripts and development of new 4.0 test scripts.
- *April/May:* Finalization of test scripts. Testing of security and workflow, business roles and processes, interfaces and the following customizations: (1) new interface process; (2) WY Legal/Expense Budget Structure #110 & 120; (3) WY Revenue Budget Structure #121; (4) BFY in pages/tables with COA data; (5) LDPM Builder: (6) user defined pages (UICODE).
- *May/June:* General testing and specifically the testing of forms and the following customizations: (1) Cost Allocation to Load Labor Hours as Statistics; (2) Labor Cost Distribution History Temporary (LCDHT) table.
- *July/August:* General testing and specifically the testing of the following customizations: (1) insurance match calculation; (2) infoAdvantage – BFY Modification; (3) custom table copies to support infoAdvantage reporting; and (4) legacy custom universes for ACFR (Annual Comprehensive Financial Report) need to be carried over to 3.11. Testing of the top fifteen (15) infoAdvantage reports. Final "story problems" for end-user UAT will be finalized.
- *August/September:* General testing and specifically, the testing of the following customization: suppression of longevity. Testing of the remaining infoAdvantage reports.

August, 2022 - January, 2023: UAT Testing and release of agency [external] testing schedule targeted for August, September, October and November.

January, 2023 - February, 2023: Final End-User UAT Testing

February, 2022 - March, 2023: HelpDesk and Operations Testing

April, 2022 - January, 2023: Delivery and Testing of Containers

Advantage 4 Testing Timeline

Reviewed at March Meeting

IST Testing

Update Testing Scripts
(once test environments are received)

Test Scripts	**Testing**	**Testing**
Review and update 3.11 test scripts **350+ scripts**	•*Forms (BIRT)* •*2 customizations*	•*Remaining infoAdvantage reports*

Go-Live

March, 2022	April	May	June	July	August	September	October	November	December	January	February	March, 2023

SH1—April
SH2 –May

Testing	**Testing**
•*Security/workflow* •*Business roles/ processes* •*Interfaces* •*6 customizations*	• *4 customizations* •*15 infoAdvantage reports*

Final End-User UAT Testing

HelpDesk Testing

Agency UAT Testing
Trainings

UAT Testing

COMMUNICATIONS AND OUTREACH PLAN

Reviewed at April Meeting

ADVANTAGE 4 COMMUNICATION PLAN

Background:

The Wyoming State Auditor's Office (SAO) is currently in the process of upgrading the State of Wyoming's uniform electronic accounting system from Advantage 3.11 to Advantage 4.0. This system is hosted and managed by CGI–the Vendor that provides the statewide application. The general Advantage 4.0 project schedule consists of three (3) phases that include: (1) *Align*: establishing the foundation for sustaining the program; (2) *Build*: activities for the iterative configuration and testing of Advantage 4.0; and (3) *Achieve*: focusing on cutover activities including final readiness assessments. The new system will go live in March 2023 (Go-Live). A key component of the project and project plan is the communication plan.

Below is a plan that describes the timeline and internal and external activities associated with communication and marketing of the new system prior to Go-Live. A majority of the communication plan will be deployed during the Build Phase with a bulk of the communication and marketing occurring between May 2022 through February 2022.

Communication Strategy Summary and Timeline:

There will be four (4) phases within the communication strategy: (1) Promote; (2) Advertise; (3) Create; and (4) Execute. It is important to note that communication will be sent to both users of the system and <u>all</u> state employees (as all employees will need to know how to navigate ESS). SAO will continually and deliberately adjust communication based on the population (users vs. employees).

1. **Promote:** During the Promote Phase, the SAO will continue to bolster and boost the system at monthly steering committee and subcommittee meetings. Additionally, SAO will send out monthly "Coming Soon!" emails to all users with "watch for announcements of upcoming events." Promotional messages will be sent in April and May.

2. **Advertise:** During the Advertise Phase, the SAO will increase promotional messages to twice-monthly, add a monthly upgrade newsletter and create a dedicated webpage for upgrade information. The monthly newsletters will include specific information about the project ("this is where we are on the project timeline"), specific system information ("did you know") and opportunities to participate in user acceptance testing ("come join the

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Below is a timeline with information about each communication phase:

Promote — April / May
- Steering Committee meetings
- Subcommittee meetings
- Ad hoc demonstrations
- Monthly emails to users (one in April and one in May)

Advertise — June - December
- Bi-monthly emails to users, monthly newsletters (June - December) and "sneak peeks" (June and July)
- Webpage (June)
- Promotion for on-line video bursts (October)
- Advertising for user acceptance testing opportunities (August, September, October and November)

Create — January / February
- Final user acceptance testing opportunities
- Promotion of training videos, manuals and handbooks
- Sign up for classes now (open registration for in-person and virtual trainings)

Execute — March (on-going)
- Confirm attendee registrations (classes, dates, schedule)
- Release of quick reference guides
- User IDs
- Reminders about helpdesk resources and procedures

ADV4 Upgrade

Home // ADV4 Upgrade

Advantage 4.0 Upgrade

The Wyoming State Auditor's Office is upgrading the State of Wyoming's Enterprise Resource Planning (ERP) system, which consists of the Wyoming Online Financial System (WOLFS), Human Resource Management (HRM) and InfoAdvantage, 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, 2023.

An upgrade steering committee was organized in January, 2022 and meets monthly.

The steering committee was formed to provide updates and gather input from key stakeholders about the status of the 4.0 upgrade project. There are three subcommittees associated with the steering committee: (1) configuration and training; (2) communication and outreach; and (3) technical.

A general project plan, including separate training, testing and communication subplans are being implemented as part of the upgrade.

Steering Committee Meeting Minutes

- January
- February
- March

Upcoming Steering Committee Meeting Dates

April 29th
May 27th
June 24th
July 29th
August 26th

Key Dates

Testing:

March, 2022 – August, 2022: Integrated System Testing
August, 2022 – November, 2022: Agency User Acceptance Testing
January, 2023 – February, 2023: Final User Acceptance Testing
March, 2023 – Go-Live

Training:

April, 2022 – Update existing handbooks and training materials
October, 2022 – Creation of on-line video bursts and development of training materials for in-person and virtual training sessions
January, 2023 – Open registration for in-person and virtual trainings

Communications:

April, 2022 – Demonstrations, monthly emails
June, 2022 – Monthly emails and newsletters, "sneak peeks", promotion of available training opportunities

If you would like a demonstration of the new system, please contact the WOLFS or Payroll Helpdesks at 777- 5258 or SAOWOLFSHelpDesk@wyo.gov

Upgrade website launched in April: https://sao.wyo.gov/upgrade/

COMMUNICATIONS AND OUTREACH

SAO WOLFS Users: ADV4 Upgrade Update Inbox ×

Kris Quick   Thu, May 5, 10:52 AM
to SAOPayrollUsers, SAOWOLFSUsers

Good morning WOLFS and Payroll Users,

The Wyoming State Auditor's Office (SAO) is upgrading the State of Wyoming's Enterprise Resource Planning (ERP) system, which consists of the Wyoming Online Financial System (WOLFS), Human Resource Management (HRM) and InfoAdvantage, from version 3.11 to version 4.0 (or ADV4). 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 set to go-live in March 2023. The SAO has formed an ADV4 Upgrade Steering Committee and subcommittees to help support this exciting project.

Information about the ADV4 upgrade and the work of the Steering Committee can be found here: https://sao.wyo.gov/upgrade/

Over the next several months, you can expect the following:

- All users will be receiving email updates about the upgrade, including information about user acceptance testing opportunities and trainings.

- All users will receive a monthly upgrade newsletter beginning in June.

- In July, the SAO will be offering "sneak peeks" of the system, where any user can come and see the upgraded system and functionality.

- All users will be invited to register and participate in user acceptance testing, which will begin in September.

If you have any concerns or are just super excited about the upgrade (and can't wait until July to see the upgraded system), you can request an agency briefing or demonstration of the new system now by contacting the WOLFS Helpdesk at 777- 5258 or SAOWOLFSHelpDesk@wyo.gov

Thank you and have a nice rest of your week,

Wyoming State Auditor's Office

COMMUNICATIONS AND OUTREACH

SAO Payroll Users: State Auditor's July-November 2022 Training Schedule Inbox ×

SAO Admin (sent by kathy.ramsey1@wyo.gov)   Tue, May 24, 9:03 AM (2 days ago)
to SAOWOLFSUsers, SAOPayrollUsers

Attached please find the State Auditor's training schedule for July - November, 2022.

The State Auditor's Office is upgrading the State of Wyoming's Enterprise Resource Planning (ERP) system, which consists of WOLFS, HRM and infoAdvantage. If you would like a "Sneak Peek" of this system to see the new and improved functions being included, please register for one of the virtual sessions being offered in July.

User Acceptance Training for the upgrade is being offered in-person during the months of September, October and November.

All other trainings are being offered in-person. For out-of-town participants, we will periodically offer virtual classes - just let us know what classes you would like to attend.

Payroll training for August through November will be by request only.

If you are unable to attend a session, please let us know as soon as possible. We only have room for a certain number of participants when conducting in-person training. We will maintain a waiting list and contact you if an opening is available.

Feel free to contact the Auditor's Office at 777-7831 or saoadmin@wyo.gov if you have any questions.

Thank you.

FOLLOWING IS A SCHEDULE FOR A SNEAK PEEK OF THE UPCOMING ADVANTAGE 4 UPGRADE. (All Sneak Peek sessions will be virtual).

Wyoming State Auditor's Sneak Peek Sessions – July 2022

DATE	TIME	SESSION	TRAINER	OBJECTIVE
July 6, 2022 Wednesday	8:30am–9:00am 10:30am-11:00am 2:00pm-2:30pm	Sneak Peek of Advantage 4 Upgrade	SAO Staff	The State Auditor's Office is upgrading the State of Wyoming's Enterprise Resource Planning (ERP) system, which consists of WOLFS, HRM and infoAdvantage. If you would like a "Sneak Peek" of this system to see the new and improved functions being included, please register for one of the virtual sessions being offered in July by sending an email to saoadmin@wyo.gov
July 7, 2022 Thursday	8:30am-9:00am 10:30am-11:00am 2:00pm-2:30pm			
July 13, 2022 Wednesday	8:30am-9:00am 10:30am-11:00am 2:00pm-2:30pm			
July 14, 2022 Thursday	8:30am-9:00am 10:30am-11:00am 2:00pm-2:30pm			

JULY
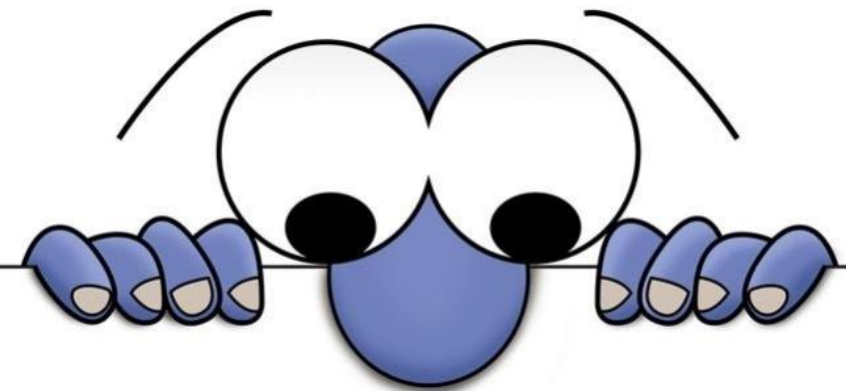
USER ACCEPTANCE TESTING

UAT for committee and subcommittee members (pilot)

- Financial: August 17th (9:00 a.m. and 2:00 p.m.)

- Payroll: August 24th (9:00 a.m. and 2:00 p.m.)

Please register for a session today! Please email or call Kathy Ramsey @ kathy.ramsey1@wyo.gov

UAT for all users will start in September and run through November!

Please have your staff register for a session today!

USER ACCEPTANCE TESTING

FOLLOWING IS A SCHEDULE FOR USER ACCEPTANCE TRAINING-Financial
Upgrade to Version 4.0 (All sessions will be in-person)
Wyoming State Auditor's Training Sessions - September – November 2022

DATE	TIME	SESSION	TRAINER	OBJECTIVE
September 7, 2022 Wednesday	9:00am-10:30am	ADV4 User Acceptance Testing - **Financial**	SAO Staff	Please join us for user acceptance testing! The Wyoming State Auditor's Office is upgrading the State of Wyoming's Enterprise Resource Planning (ERP) system, which consists of the Wyoming Online Financial System (WOLFS), Human Resource Management (HRM) and infoAdvantage, 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 of the system (Advantage 4 or ADV4) is tentatively set to go-live in March, 2023.
September 7, 2022 Wednesday	2:00pm-3:30pm			
September 9, 2022 Friday	9:00am-10:30am			
September 21, 2022 Wednesday	9:00am-10:30am			
September 21, 2022 Wednesday	2:00pm-3:30pm			We need your help to test the system! During user acceptance testing, you will be provided training materials (manuals and guides) and asked to test certain aspects of the upgraded system. All users are encouraged to register and attend a session in either September, October and November. **Please note, we have a limited number of spots during each session and it is recommended that users only attend one session.**
September 23, 2022 Friday	2:00pm-3:30pm			
October 5, 2022 Wednesday	9:00am-10:30am			
October 5, 2022 Wednesday	2:00pm-3:30pm			
October 19, 2022 Wednesday	9:00am-10:30am			
October 19, 2022 Wednesday	2:00pm-3:30pm			
November 2, 2022 Wednesday	9:00am-10:30am			
November 2, 2022 Wednesday	2:00pm-3:30pm			
November 9, 2022 Wednesday	9:00am-10:30am			
November 9, 2022 Wednesday	2:00pm-3:30pm			
November 16, 2022 Wednesday	9:00am-10:30am			
November 16, 2022 Wednesday	2:00pm-3:30pm			

FOLLOWING IS A SCHEDULE FOR USER ACCEPTANCE TRAINING-Payroll
Upgrade to Version 4.0 (All sessions will be in-person)
Wyoming State Auditor's Training Sessions - September – November 2022

DATE	TIME	SESSION	TRAINER	OBJECTIVE
September 14 2022 Wednesday	9:00am-10:30am	ADV4 User Acceptance Testing- **Payroll**	SAO Staff	Please join us for user acceptance testing! The Wyoming State Auditor's Office is upgrading the State of Wyoming's Enterprise Resource Planning (ERP) system, which consists of the Wyoming Online Financial System (WOLFS), Human Resource Management (HRM) and infoAdvantage, 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 of the system (Advantage 4 or ADV4) is tentatively set to go-live in March, 2023.
September 14, 2022 Wednesday	2:00pm-3:30pm			
September 16, 2022 Friday	9:00am-10:30am			
September 28, 2002 Wednesday	9:00am-10:30am			
September 28, 2022 Wednesday	2:00pm-3:30pm			We need your help to test the system! During user acceptance testing, you will be provided training materials (manuals and guides) and asked to test certain aspects of the upgraded system. All users are encouraged to register and attend a session in either September, October and November. **Please note, we have a limited number of spots during each session and it is recommended that users only attend one session.**
September 30, 2022 Friday	9:00am-10:30am			
October 12, 2022 Wednesday	9:00am-10:30am			
October 12, 2022 Wednesday	2:00pm-3:30pm			
November 3, 2022 Thursday	9:00am-10:30am			
November 3, 2022 Thursday	2:00pm-3:30pm			
November 10, 2022 Thursday	9:00am-10:30am			
November 10, 2022 Thursday	2:00pm-3:30pm			

HOMEPAGE CONFIGURATION