

Advantage 4 Steering Committee Meeting
May 27, 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
Erin Benskin, Accounting Division Manager – Auditor's Office
Ted Robinette, Principal Accountant – Auditor's Office
Leesha McIntire, Principal Accountant – Auditor's Office
Lyndsay Orr, Accounting Manager – Wyoming Business Council
Robin Cooley, Director – Workforce Services
Korin Schmidt, Director – Department of Family Services
Colleen Quinn, Chief Financial Officer – Department of Family Services
Dawn Williams, Deputy State Treasurer
Kevin Hibbard, Director – State Budget Department
Jess Ketcham, Budget Administrator – State Budget Department
Erin Williams, HRD Administrator – Department of Administration & Information
Jared Hanson, Human Resources Program Supervisor – Department of Administration & Information
Kirsten Anderson, Chief Financial Officer – Enterprise Technology
Claire Smith, Chief Fiscal Officer - Wyoming Supreme Court
Don Richards, Budget & Fiscal Administrator – Legislative Service Office
Craig Spradlin, Accounting Manager – Department of Health
David Ray, Fiscal Manager – Water Development Office

Auditor Racines thanked those in attendance, and stated she wants to be mindful of everyone's time. As a reminder, she indicated she will probably say some of the exact same things at the beginning of each meeting that most participants have heard, but there may be new people joining for the first time and she wants to make sure they are aware of the structure of the meetings.

Auditor Racines provided some background information regarding the Steering Committee. This Committee was formed to provide updates and gather input from stakeholders about the Advantage 4 Upgrade. This upgrade focuses on the State of Wyoming's Enterprise Resource Planning (ERP) system, which consist 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 (4.11) is scheduled to go live in March, 2023.

The last meeting of the Steering Committee was held on April 29, 2022. Minutes of this meeting have been sent out. The minutes can also be accessed on the State Auditor's website. This is probably over communication for many members. At the end of this project, the Auditor's Office doesn't want anyone saying that SAO failed to provide information or didn't give anyone an opportunity to ask questions. At the last meeting, there was also a review of the Communication Plan. This plan has been reviewed by the Steering Committee, and the Training, Testing and Communication Plans have been approved. Auditor Racines thanked all the members for their continued support. She appreciates the attendance of high-level staff and fiscal employees, as those people will be affected the most by the upgrade.

Eydie Trautwein stated it has been routine at the Steering Committee meetings to provide a PowerPoint presentation. She provided another presentation entitled *Advantage 4 Steering Committee Updates – May, 2022*. The structure of the Steering Committee also has three subcommittees: The Configuration and Training Subcommittee has been going very well. They have divided the subcommittee into two parts – one fiscal and one payroll. They have been meeting monthly and a lot of good work has been completed. The Communications and Outreach Subcommittee has been delayed. Rebecca Zisch, Executive Director of the Real Estate Commission, was going to co-chair this subcommittee with Eydie Trautwein. Ms. Zisch has left that position and will no longer be the co-chair. Ms. Trautwein will try to resume this subcommittee in June. This is something the Auditor's Office (internal staff) can take the lead on. It is not impacting the project, but in case anyone was wondering why they aren't seeing formal reports from this subcommittee, that is the reason. The Technical Subcommittee was to have launched last month as well. A lot of the work from this subcommittee will be focused on interfaces. Currently, CGI is still working internally to present a solution that will replace the Auditor's Office existing interface process. The Auditor's Office has discussed internally how they want this subcommittee (and the others) to be meaningful, so until there is a solution, they will wait to hold a more formal meeting. Jerry Rief will take the lead on the Technical Subcommittee.

Eydie Trautwein reviewed the overall project timeline. The major event to happen in May was the launch of the Technical Subcommittee, which will now probably take place in June, and also the delivery of the environments. To give an update on the environments, CGI has delivered to Wyoming two test environments. We now have SH1 and SH2. Those test

environments are working extremely well. CGI is delivering bi-weekly containers of patches into those test environments and the Auditor's Team is testing them.

They have only encountered a handful of issues. The last test environment Wyoming will receive is the test environment with infoAdvantage. That will be delivered the end of July.

Eydie Trautwein reviewed highlights and deadlines from the training, testing and communication plans. User acceptance testing and training will begin in September. For the most part, everything is on track, and to some extent, the Auditor's Office is ahead of schedule. In May and June, a lot of script testing will take place. The Auditor's Technical Division is working on the creation of BIRT forms. They are moving through this period for testing in August.

At the last meeting in April, the Communication and Outreach Plan was reviewed. This plan was broken into four parts: Promote, Advertise, Create and Execute. Prior to that plan, a webpage was created and pushed out early so people could get information. Basic information regarding the upgrade is on this webpage. Steering Committee minutes are also posted as well as upcoming meeting dates. There is also a notification stating if an agency would like a demonstration of the new system, to contact the Auditor's Office. A few agencies have done this, and it has been going very well. If you have staff that are curious about the new system, please contact the Auditor's Office.

Kris Quick gave an update. He said that the Configuration and Training Subcommittee has been excellent. All three branches are represented, which is a huge benefit. It is not that often that all three branches are in a meeting to discuss various options. Great feedback has been given. Mr. Quick is very appreciative of the time each agency is devoting to this. The next meeting is scheduled for June 16th. ISP testing is going very well. The Financial Division has completed 75 of 93 scripts and the Payroll Division has completed 87 of 120 scripts. The remaining are related to cycle processing. As the Auditor's Office continues to move along, they will begin running test cycles. As far as document processing and on-line functioning, the Auditor's Office is pretty well through with that testing and everything is checking out.

Two trainers, Kat Jaber and Leesha McIntire are currently rewriting the training manual. This manual will be ready for the first User Acceptance Testing. You can sign up for this testing now. The Auditor's Office is also generating story problems. They are continuing that process for the User Acceptance Testing. All is progressing well, and they are in a really good place.

Eydie Trautwein believes this upgrade is going so much better than the 3.11 upgrade. At this point in time, during the 3.11 upgrade, there were pages and pages of issues that were filed with CGI that just sat there and were slowly resolved. Wyoming was sort of the guinea pig on 3.11. For 4.0, the state of Michigan was the guinea pig, so they have done a lot of the heavy lifting around the identification of issues and system defects. Ms. Trautwein is pleased that things are going well.

The Auditor's Office has started to send out, as part of their communication and outreach structure, emails to all users. This was discussed at the last Steering Committee meeting. Many Steering Committee members may not be getting these emails because you are a director and not a WOLFS user. Following is the type of emails being sent out:

"Good morning everyone. As you know, we are upgrading. Here's what you can expect. We are going to over communicate. We will be doing newsletters. You can get a sneak peek of the system. Also, please participate in the User Acceptant Testing." An email stating this went out on May 5, 2022. The Auditor's Office had their helpdesks ready for calls, but they didn't receive a lot. Emails will continue to be sent out and will become more and more frequent.

On May 24, 2022 an email was sent to all users announcing the training plan for July – November 2022. Within this training plan, there is an opportunity for users to register for sneak peeks of the system in July, as well as User Acceptance Testing. The schedule is also on the Auditor's website under the training tab. A lot of people have already registered.

Director Schmidt asked if there will be any changes to ESS as a result of the payroll functions. Eydie Trautwein responded yes. There are two different communication strategies. One is for the users and one is going to be for ESS, which has a very different user base and audience. The plan is to wait until December when W2 information is being sent out. A notice

will say "This is the last time this will look like this." It might be a little confusing to start communicating that now. But there are definitely two strategies for that – ESS and system users.

In July, there are 12 sneak peeks of the system being offered virtually. Anyone can sign up for them. Email the Auditor's Office at saoadmin@wyo.gov to register. Also, the User Acceptance Testing schedule has been released. As a reminder, the plan is to be ready to do this testing in August for Steering Committee and Subcommittee members first, then it will be opened up to all users. User Acceptance Testing for Committee members will be on August 17 for Finance at 9:00am or 2:00pm, and on August 24 for Payroll at 9:00am or 2:00pm. The same registration process can be used. This is also a good opportunity for the Auditor's Office to hear from Committee members about questions you think your staff may have. Once August is over, User Acceptance Testing will be open to all users in September, October and November.

The Auditor's Office has also been working with CGI regarding home page configuration to determine how many pages are needed. So far, such items as Accounting, Executive Employee, Judicial Employee, etc. have been discussed. A few agencies will need their own home pages (Procurement, Treasurer, LSO, Budget, EGI and Retirement). Ms. Trautwein has reached out to the Directors of those agencies to set-up design sessions. The focus will be on those agencies and their home pages for the next few weeks.

Kris Quick displayed a few home pages for the Committee to view. He stated there are now generic pages that have a standardized look. The top left corner has a nine square grid. That will remain consistent. Procurement rules, training website and other heavily used pages will be listed on the home page.

The Subcommittees are discussing a build out for the left hand side navigation panel – this is for a more heavily used function of the system. Oversight pages will be individualized to the need of the agency.

At the conclusion of this meeting, please feel free to contact Eydie Trautwein with any questions. Ms. Trautwein stated that the PowerPoint presentations and well as any communication plans will be posted on the Auditor's website.

The next Steering Committee meeting will be held on June 24, 2022 at 8:30am.