

Advantage 4 Steering Committee Meeting  
July 29, 2022 – 8:30am

Participants:

Auditor Racines  
Deputy Auditor Trautwein  
Kris Quick, Payroll Manager – 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  
Colleen Quinn, Chief Financial Officer – Department of Family Services  
Tricia Bach, Director – Department of Administration & Information  
Jared Hanson, Human Resources Program Supervisor – Department of Administration & Information  
Kirsten Anderson, Chief Financial Officer – Enterprise Technology Services  
Bill Vajda, Chief Information Officer – Enterprise Technology Services  
Robin Cooley, Director – Department of Workforce Services  
Christina Merritt, Deputy Chief Financial Officer – Department of Workforce Services  
Kevin Hibbard, Director – State Budget Department  
Craig Spradlin, Accounting Manager – Department of Health  
Danna Confer, CGI

Auditor Racines welcomed those attending. She indicated there weren't many in attendance today, but that was expected because of Frontier Days. She wanted to let everyone know that the minutes from the last meeting on June 24<sup>th</sup> were attached to the meeting reminder that Eydie Trautwein sent out on July 26<sup>th</sup>. If you were unable to attend that meeting, you can review those minutes and let the Auditor know if you have any questions or concerns.

Eydie Trautwein presented a general project update. She wanted to provide everyone with a high level overview of the project. She shared a screen to remind everyone what has been placed on the State Auditor's Office website.

Ms. Trautwein stated there is a dedicated web page for the upgrade. If you go to the top bar to "upgrade" it has all the high level dates for the upgrade, testing, training and communication. All of the minutes from previous meetings are also posted as well. The PowerPoint presentation from the last meeting is also included. Ms. Trautwein wanted to remind everyone of the high level upgrade timeline. Currently, everything is right on time. Nothing has slipped with regard to the timeline. We are now headed into August. You will hear the committee chairs talk about user acceptance training, which will pilot with the subcommittee members in August, and will be offered to all users in September. CGI is also on the phone now at this meeting. The Auditor's Office will be getting infoAdvantage test

environments. Ms. Trautwein stated that technically that has slipped a little bit, but we are getting those test environments for the reporting component in August. Other than that, we are headed into the big bulk of work which is user acceptance testing. She wanted to remind everyone again, that all this information is on the Auditor's website.

Kris Quick presented a Configuration and Training Subcommittee update. He stated that the integrated system testing has been completed for the initial environment. He has been working on finalizing home pages and business roles. We have actually dwindled down the list – we started with 22 and are down to 18. We found some areas to consolidate. The statewide ones have been completed. We are working now on the oversight agencies. We have three we are continuing to finalize – so of the 18, we have 15 fully completed for home and business roles. We have completed the first draft of the manuals, both Financial and HR. They are going through the final round of the first review. We completed the drafts and are doing an internal check. The subcommittee user acceptance trainings will be held on August 17<sup>th</sup> and 24<sup>th</sup>. If anyone wants to attend, we encourage you to do so. For those sessions, we will have story problems. We are testing those internally now to make sure they are good to go for the user acceptance training sessions. There will be more “life-like” examples of what we can expect your staff to encounter as they do their daily jobs – such as if you get a W9, you need a vendor scenario. The subcommittee meeting will be the user acceptance training in August, then the subcommittee will meet in September. There will be more discussion about new configuration of the system as far as business processes.

Eydie Trautwein reported on the Communication and Outreach Subcommittee. They have been sending out monthly emails to all users which includes general information about the upgrade – stating the project is going well and we're set to go live in March of 2023. Information about user acceptance trainings have also been sent out. These emails went out on May 5, June 2 and July 26. We will continue to send them out. We did have a little bit of a break between June and July. We didn't want to inundate a lot of the WOLF users with additional emails because a lot of year-end activities were happening. We sent out a brief email last week mostly about user acceptance trainings.

We did have system Sneak Peek sessions in July. Those went very well. We had 12 sessions. They were about 30 minutes long. We had 268 users attend. We had members of the State Auditor's Staff conduct a quick demonstration of the system so users could see what it looks like and get some basic information about navigation. We also took them through some of the home pages for finance and payroll. We did get some questions during the Sneak Peeks. The plan is to use some of those questions and put them in a FAQ document that we

can release as we start to get into the user acceptance trainings. The questions were good. We had questions about data conversion – will the data still be there? The answer is yes. I think people were excited about the single log-in. We had a couple of people say “is this neo-gov”? – as it looks similar to the system A&I may be rolling out. I think there were a lot of positive comments as well as good questions we can put into a written format so there is no confusion about what is happening with the upgrade.

Another thing that happened as a result of the Sneak Peeks – at the end of each Sneak Peek we said “if you go back to your agency and your director wants an agency briefing or you want us to come and do an agency specific demonstration, please let us know”. We did have a few agencies take us up on that. We have scheduled one with the Public Service Commission and also with the Boards and Commissions quarterly meeting to give a demonstration as well. So – just a reminder – if you’re feeling you need a refresher for additional staff, we are happy to do that. Please let us know if you want a customized agency briefing or demonstration.

We had a great suggestion at the last Steering Committee meeting to contact Matt Nagy for a Subject Matter Minute. We had a meeting with Mr. Nagy earlier this month and we are on the schedule to do a September Subject Matter Minute. We are excited. We’ll stick to three to five minutes and give an overview of the upgrade project. That will go out to everyone in the Executive Branch.

Additionally, we are working on the upgrade and incorporating it into some of our normal business processes at the Auditor’s Office. The Auditor, Deputy Auditor and other staff members periodically conduct agency Meet and Greets. If there’s a new director that comes on, we try to set up a Meet and Greet. We are going to resume those meetings between September and December of this year – just for the Auditor to reintroduce herself to agency directors to see if there’s any questions or concerns about the State Auditor’s Office. We will spend time talking about the upgrade to make sure those agencies and directors are comfortable with the project.

Jerry Rief gave an update on the Technical Committee. He stating they are continuing their work on the script testing on converting custom scripts. They have actually converted all of the FIN and HRM scripts with necessary code changes and are moving through testing each script. BIRT form developments – there are 14 required BIRT forms that need to be completed. They have created 8 of the 14 – so good progress is also being made.

The infoAdvantage FIN test environment should be delivered next week. Right now, it is scheduled to be accessible on August 5<sup>th</sup>.

Most importantly, CGI is still working on a new interface process – the customization from 3.11 to Advantage Connect. Once that is complete, we will hold a subcommittee meeting and pull in agency stakeholders.

There is another meeting scheduled for August 4<sup>th</sup> for a testing/execution walk through with CGI.

Kris Quick said that today we discussed home pages being finalized, and he would like to give a demonstration of that. He showed several examples. As you know, with the statewide pages, for example, HR Payroll, we stayed with a pretty good outline of the nine square grid in the left hand corner with the widgets surrounding it – depending on what was needed for the role.

With the actual agency oversight pages, they have the ability to help us direct what changes they desire. They are more slimmed down. It doesn't cover more broad information – it's just specific to their needs. For example, Mr. Quick showed the page for Procurement/Purchasing Division under A&I. You will see the quick link related to more of their area – requisitions, purchase orders, service agreements. They do a lot of approvals, so there is an approval work list. Another example he showed was EGI – they are more worried about one time insurance deductions, enrollments, benefits, cobra processing – it is narrowed down to their vision of focus rather than seeing all the information. Mr. Quick stated they met with HRD. Their page is a little more standard with the nine square grid. Retirement probably uses the system the least amount. They have a couple deductions for deferred compensation or the defined benefit plan. As you can see, the roles vary on the home pages based on the user needs. We work with the agencies to try to make it user friendly for them.

Eydie Trautwein asked if there was any feedback – if we are doing a good job? Christina Merritt said “yes.” Ms. Trautwein also asked if it feels like we are getting enough communication out? Kirsten Anderson responded “yes”.

Ms. Trautwein said we are happy to accommodate anyone if they need more information, and we welcome any suggestions.

The Auditor thanked those who attended today and stated the next meeting will be held on August 26<sup>th</sup>.