

Advantage 4 Steering Committee Meeting
August 26, 2022 – 8:30am

Participants:

Auditor Racines
Deputy Auditor Trautwein
Kris Quick, Payroll & Fiscal Division Manager – Auditor’s Office
Jerry Rief, Technology Division Manager – Auditor’s Office
Christian Dorr, Senior Computer Technology Analyst – Auditor’s Office
Erin Benskin, Accounting Division Manager – Auditor’s Office
Kat Jaber, Fiscal & Payroll Division Deputy – Auditor’s Office
Ted Robinette, Principal Accountant – Auditor’s Office
Leesha McIntire, Principal Accountant – Auditor’s Office
Colleen Quinn, Chief Financial Officer – Department of Family Services
Jared Hanson, Human Resources Program Supervisor – Department of Administration & Information
Kirsten Anderson, Chief Financial Officer – Enterprise Technology Services
Christina Merritt, Deputy Chief Financial Officer – Department of Workforce Services
Kevin Hibbard, Director – State Budget Department
David Ray, Fiscal Manager – Water Development
Erin Williams, Administrator–Human Resources Division–Department of Administration & Information
Rory Horsley, Chief Financial Officer – Department of Administration & Information
Dawn Williams, Deputy State Treasurer
Katie Smith, Administrator of Financial Accounting – Treasurer’s Office
Don Richards, Budget & Fiscal Administrator – Legislative Service Office
Lyndsay Orr, Accounting Manager – Wyoming Business Council
Renny MacKay, Policy Director – Governor’s Office
Robin Martin, Chief Financial Officer – Department of Workforce Services
Elizabeth Kirkman, CGI

Auditor Racines welcomed those attending and stated she appreciates everyone taking the time out of their busy day to let her office keep them updated and to give feedback.

The Auditor indicated the last Steering Committee meeting was held on July 29, 2022. Deputy Trautwein sent out the minutes from that meeting in an email three days ago. They are also posted on the Auditor’s website.

Eydie Trautwein displayed the PowerPoint presentation that was used at the beginning of the Steering Committee meetings. This PowerPoint is also on the Auditor’s website. The Auditor’s Office stopped sharing some of these PowerPoints in May, but they hit all of their milestones for goals identified in the Project Plan through May.

In order to be transparent, Eydie Trautwein stated the Auditor's Office has been having some issues with our vendor – specifically around the delivery to our infoAdvantage environment. As you look through the dates, we had in February our Training Plan, in March our Communication and Outreach Plan. April, we started the delivery of some of our test environments and ISTs. The vendor has timely delivered test environments SH1 and SH2 but has not delivered infoAdvantage. We are waiting on the infoAdvantage test environment and infoAdvantage production environment. The vendor has been put on notice. They should have been delivered to us in July. They are telling us now it will be delivered the end of August. We wanted to be able to do some additional testing of some of our reports, and had hoped to have that environment delivered at the end of the month. The good news is, we anticipated situations like this, so we added a cushion between May 2022 and March 2023 just for situations of this nature. Once infoAdvantage environments are delivered, we should be able to make up time in October and November to keep the overall project on time.

Ms. Trautwein stated the Auditor's Office began our User Acceptance Testing in August and it has been going quite well. The actual interface and product that we use – the Advantage 4 that we will be upgrading, is going very well. We've had very few issues identified, even in the User Acceptance Testing that occurred this month. It's working as it should. We just need the vendor to deliver infoAdvantage so we can start testing reports. We are still in a good place, but we wanted everyone to know why you might not have been seeing invitations for the Technical Subcommittee.

The Training Plan is on schedule. The manuals have been created. The users were able to use the draft manuals for the User Acceptance Testing this month. In October through January we will be working to create and publish on-line video bursts and finalize what virtual and in-person training will look like when we go live. All of this is on schedule. The Testing Plan is on schedule as well. Again, we completed IST testing and have started User Acceptance Testing. We want to focus on testing forms, security workflow and business roles – all of that has been happening and is even ahead of schedule.

Our Communication and Outreach Plan: The monthly emails we have been sending out to users have been working very well. Our User Acceptance Testing sessions in September are full. We are on schedule with our plans around Communication and Outreach.

Kris Quick stated that the Configuration and Training Subcommittee did not meet in August. Instead, there were four User Acceptance Testing sessions scheduled – two for financial and two for HRM. There were quite a few participants that came to the Auditor's training room. They were actually able to log in and start helping us run through testing

problems. It was a good pilot session for the Auditor's Office to be able to work out any issues before it is opened up to the full population in September, October and November. There will be adjustments made to a few story problems and any of the errors found in the manuals. It has given everyone a good chance to view the manuals and make sure the process is good and the steps make sense.

Mr. Quick also stated that the User Acceptance Testing pilots went well. He is looking forward to starting the full testing in September. If you have any staff that is interested, please have them contact the Auditor's Office. The financial sessions for September are full, but there are still openings in October and November. On the payroll side, there are openings in September, October and November. Encourage your staff to sign up. The more people we have come through, the better the test results will be.

The User Acceptance Testing is not training. It is testing. We have story problems we actually have users go through and follow the steps in the manuals. We have finished the financial manual and payroll manuals. We have a payroll manual for payroll users, and an employee and manager manual that have all been completed in the first draft. The User Acceptance Testing will help us determine if we have any issues or updates.

In September, we will be starting the development of training videos. The Financial and Payroll Divisions will be developing navigational videos. We will have navigational videos to send out as the project continues. We will begin meeting with the Subcommittees in September. Mr. Quick will send out invitations soon to start discussing the remaining configuration items left on the list before we go live.

Eydie Trautwein stated she had a chance to attend some of the User Acceptance Testing sessions. Everyone seems to like what they are initially seeing. We are trying to make it a pleasant atmosphere where people want to attend. She thanked her staff and all those that attended.

Ms. Trautwein indicated the Communication and Outreach Committee has been sending out monthly emails to users. These emails are a reminder that we are upgrading. They give a link to the Steering Committee. This month we chose to thank everyone for their participation in the User Acceptance Testing, and tried to give everyone an idea of what a User Acceptance Testing session will be like when they come. We are encouraging anyone to sign up for future sessions. Just a reminder, the September financial sessions are full. Ms. Trautwein also wanted to remind everyone that we were able to schedule and work with Matt Nagy on a Subject Matter Minute. He has the script, and the Subject Matter Minute will go out to all state

employees in September. This will high-light some of the changes that will be happening in the system.

The Auditor's Office had several agencies reach out to them and request specific demonstrations of the system. The first one they presented to was the Boards and Commissions meeting. They have quarterly meetings. We did a Sneak Peek of the system and took questions. Additionally, the Department of Family Services set up a demonstration for approximately 60 employees. We did a demonstration of the system – getting people familiar with what it looks like and making sure they understand the timeline. There were a few additional small sessions. We will continue to do these as agencies reach out. If you want us to come and do a demonstration for your staff, we can put that together very quickly and work around your schedule.

The Auditor's Office will start doing agency Meet and Greets. The Auditor and Deputy will meet with Directors and CEOs. We will make sure they know about the upgrade and are comfortable with it. We will ask if they want demonstrations.

Jerry Rief shared a technical subcommittee update. He stated that at this point we are continuing to test scripts. We are focusing on the financial side now. We have made it through most of the financial cycle, and have been able to generate the warrants and the ACH files. Everything is going as planned.

Mr. Rief stated that the BIRT forms are approximately 70% completed. He hopes to have the remainder completed by the end of September. InfoAdvantage should be delivered by the end of this month. He is optimistic that we will have both Prod and Non-Prod by the end of next week, at which point we can begin to configure the software as well as verify reports.

CGI is still working on our current NIP (new interface process) customization. Once we have this completed, we will hold subcommittee meetings. We have made quite a lot of progress with Advantage connection functionality, which is a replacement for NIP. We are probably 60% of the way through the process. Once we get a working model, we will set up all the interface security and all the different files that are processing through. We are still waiting for some patches in regards to that. A lot of progress has been made in the past week.

Eydie Trautwein stated there has been work completed on homepage configuration. The Budget Division and the Treasurer's Office have been completed. Ms. Trautwein thanked those agencies for working with the Auditor's staff to get those finalized.

Jerry Rief gave a presentation on how to print a GAX and TADJ. He demonstrated how they can be printed and saved as a PDF file. A pdf is generated from the BIRT form. You can store the documents for future reference or print. Eydie Trautwein stated that this has come up because several agencies need to be able to print certain documents and make sure they look a certain way for document retention and audit purposes. A lot of time has been spent making sure when the system goes live and that the documents look a certain way and are easy to print and save. She thanked Jerry Rief and his team for their work.

Eydie Trautwein stated we will keep everyone informed as to when the environments are delivered.

The next Steering Committee will be on September 30, 2022 at 8:30am.