

Advantage 4 Steering Committee Meeting
October 28, 2022 – 8:30am

Participants:

Deputy Auditor Trautwein
Kris Quick, Payroll & Fiscal Division Manager – Auditor's Office
Kat Jaber, Fiscal & Payroll Division Deputy – Auditor's Office
Jerry Rief, Technology Division Manager – Auditor's Office
Christian Dorr, Senior Computer Technology Analyst – Auditor's Office
Leesha McIntire, Principal Accountant – Auditor's Office
Eric McVicker, Chief Financial Officer – Department of Health
Timothy Sheehan – Enterprise Technology Services
Kirsten Anderson, Chief Financial Officer – Enterprise Technology Services
Rory Horsley, Chief Financial Officer – Department of Administration & Information
Jared Hanson, Human Resource Program Manager – Department of Administration & Information
Dawn Williams, Deputy State Treasurer
Lyndsay Orr, Accounting Manager – Wyoming Business Council
Renny MacKay, Policy Director – Governor's Office
Claire Smith, Chief Financial Officer – Wyoming Supreme Court
Brenda Reedy, Human Resource Manager – Wyoming Supreme Court
Amy Grenfell, Chief Operating Officer – Wyoming Business Council
David Ray, Admin/Fiscal Manager – Water Development Office
Don Richards, Budget and Fiscal Administrator – Legislative Service Office
Elizabeth Martineau, Fiscal Analyst – Legislative Service Office

Eydie Trautwein began the meeting by telling those attending that Auditor Racines sends her apologies today. She is out-of-state and unable to attend. Ms. Trautwein stated that today is the 10th Advantage 4 Steering Committee meeting. Ms. Trautwein will be walking through today's agenda and helping to navigate some of the subcommittee reports and updates.

The minutes from the September 30, 2022 meeting were sent out on Tuesday. Just as a reminder, you can also access the minutes on the Auditor's website under the "upgrade" tab. Ms. Trautwein provided a general project plan update and review of the timeline. She shared her screen and showed the Advantage 4 Project Timeline that has been reviewed in several of the meetings. You can see in October, November and December we are focused on user acceptance training. Ms. Trautwein is happy to report that the project is on track and on schedule. The next several months will be focused on continued testing, which you will hear from the subcommittees. There have not been a lot of issues, which is amazing. In October, November and December the focus will be on building out the training for Advantage 4 and making sure we have materials and resources available to users when we go live.

Ms. Trautwein gave a little more detail about go live. The Auditor's office has begun to meet with the vendor and finalize dates for actual go live. Tentatively, we are scheduled to take 3.11 down on March 29th. We would be down for two to three business days. The new upgraded system would come up April 3rd. We are still working to finalize exact times and dates. I know we have generally been saying we will go live in March of 2023, and now we are beginning to finalize specifics and logistics around those dates. The good news about that week is that the session will be over and that week is actually spring break in Laramie County School District Number 1, so we are hoping that some of our users will not be impacted because some people tend to take time off that week. Again, that is when we are scheduled to take the system down and go live.

Another update is we have now moved into part of the project where we are doing mock cut-overs. In making sure our staff and CGI is ready for the cut-over, we completed our first mock cut-over this week. It went well for our first one. We did identify some steps that we will need to speed up or add additional information to make sure the steps and data configuration is in place. But all in all, it was a success.

Kris Quick presented an update for the Configuration and Training Subcommittee. He stated that user acceptance training is continuing to go quite well. There have only been a few issues on the HRM side. Everything is on track. We have got a lot out of user acceptance trainings. As far as doing our new manuals, we did a lot of configuration of the new system as far as documents, taking out fields, trying to streamline processes. We received a lot of feedback and a lot of assistance through the user acceptance training sessions - making sure all of that is going to go smoothly. It has been a huge help. We appreciated your staff's time in helping. As far as the subcommittees, we did meet yesterday. We are getting down to the last few final decisions before we go live. We have about four months left for any future configurations. We have moved more into the training section. Starting this month our lead trainers, Leesha McIntire and Kat Jaber, have started recording videos. We are going to record some of the lower level training classes, such as navigation, and on the payroll side especially for employees and managers navigation and the timesheets. They are starting on those videos so we can send those out ahead of time. We are targeting March for our first set of sessions. March, April and May will be heavy in training. We will have that schedule finalized more towards January and be sending that out. We are continuing to test reports internally. So far that has gone really well. In infoAdvantage, as we showed last time, the look has changed a little bit. We are still working on that configuration and are making sure it is as easy to navigate as possible. We are planning on some sneak peeks in December to show that off. It will be like we did in July. We will schedule some times that will be virtual and we will run through what infoAdvantage looks like going forward.

Eydie Trautwein stated that the Communication and Outreach Subcommittee is continuing to make sure we are talking about the upgrade when we get a chance. We did do a subject matter minute in September. Hopefully everyone got a chance to look at that. Hopefully all users around the state were able to access it and get some information about the upgrade. We will continue to do agency meet and greets with a focus on our meetings with Directors and CFOs about the upgrade to make sure everyone is fully aware of the timeline and what we are doing. At the last meeting, Ms. Trautwein asked everyone if they thought we should be communicating more or less. Folks are feeling like we are communicating enough. We will definitely pick up communications and do additional email blasts as we head into January, February and March.

Jerry Rief presented an update for the Technical Subcommittee. They are still working their way through the testing of the pay cycle. All the custom scripts have been modified. They received access to the Cobol server this week. There are 14 Cobol programs that are used extensively for payroll extracts. Those should be converted within the next month. All the scripts are modified for the FIN Cycles. All the BIRT forms have been completed. We will be putting in a request to migrate those forms for user acceptance testing. We continue to work on the NIP customizations through Advantage Connect. We have completed the customization for UMB payments. The other two customizations we have left are dealing with the redeemed warrant processes. When we finish that, we are looking at the compensation interface. Most of the basic document codes are fine. We just finished Mock 1 of the 3 Mock cut-overs we have this week. The next one is scheduled to start on December 1st.

Eydie Trautwein said that a lot of backend system work is happening to make sure everything is in a really good place to go live. She thanked Jerry Rief, Christian Dorr and Ramesh Chennasamudiram for all their work.

Kris Quick gave a presentation on infoAdvantage and some of the added functionalities. He said that we now have a report that opens automatically when you first open. Every time you log in, that report will be there. They are going to look into making that report look a little nicer. Once you get to the home screen, one of the biggest advantages is "instances". This is when you have a scheduled report - a lot of the financial users schedule reports for budgets, month end - these instances will now show up. The nice thing is they can manage and monitor their instances instead of going to the individual reports. If you have an instance that was previously run, instead of having to create it - they can tell it to reschedule or replace. You don't have to update everything you have already entered. That will be nice to manage reports. Anything scheduled in 3.11 will be brought forward to Advantage 4 so you won't have to reschedule. The look of the reports aren't changing but how you get to them is a little different. There is the ability to "favorite" reports.

Eydie Trautwein said that the plan is to do infoAdvantage sneak peeks. Those will be scheduled tentatively for December 7th. We will make sure we update the training calendar and get those on our website.

Elizabeth Martineau, Fiscal Analyst – Legislative Service Office, asked if there will be training on infoAdvantage as well. LSO loves infoAdvantage. Kris Quick said our internal user acceptance training will take place in January and February. The hard part for us is that December and January become a very busy time of year with tax reporting. There is a lot of system updates. We are looking at it internally and trying to find some times, but the hard part is the number of sessions. It has been pretty full the entire time. If we only have four or five classes it will only hit a few people. We haven't decided yet if it's something we will get to or not.

Eydie Trautwein said that if Elizabeth Martineau and LSO is interested in helping with user acceptance trainings, maybe they could come in if they have time. We would love to have help. Elizabeth said with Don's permission she would very much like to help.

Amy Grenfell from the Business Council stated she is excited about the new reporting functionality.

Eydie Trautwein said that the next meeting will be held on November 18, 2022 at 8:30am.