

Advantage 4 Steering Committee Meeting

February 24, 2023 – 8:30 a.m.

Participants:

Kristi Racines, State Auditor
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
Erin Benskin, Accounting Division Manager – Auditor's Office
Leesha McIntire, Principal Accountant – Auditor's Office
Carrie Stokes, Principal Accountant – Auditor's Office
Dawn Williams, Deputy State Treasurer
Katie Smith, Chief Financial Officer – Treasurer's Office
Erin Williams, Administrator, HRD - Department of Administration & Information
Jared Hanson, Human Resource Program Manager, HRD – Department of Administration & Information
Rory Horsley, Administrator – Accounting - Department of Administration & Information
Trent Carroll, Chief Operations Officer – Department of Education
Brenda Henson, Director – Department of Revenue
Amy Grenfell, Chief Operating Officer – Wyoming Business Council
Lyndsay Orr, Accounting Manager – Wyoming Business Council
Kevin Hibbard, Director – State Budget Department
Korin Schmidt, Director – Department of Family Services
Rhonda Holt, Chief Financial Officer – Department of Family Services
Robin Cooley, Director – Department of Workforce Services
Claire Smith, Wyoming Supreme Court
Brenda Reedy, Wyoming Supreme Court
Elizabeth Martineau, Senior Fiscal Analyst – Legislative Service Office
Kirsten Anderson, Chief Financial Officer – Enterprise Technology Services

Auditor Racines welcomed the participants that were attending today's Advantage 4 Upgrade Steering Committee Meeting (February 24, 2023), and thanked them for taking the time out of their busy schedule to attend. She stated that the last meeting was held January 27th. If you were unable to attend that meeting, Eydie Trautwein sent out the minutes in the meeting reminder earlier this week for you to review. Auditor Racines told the Committee that we are getting excited about the Advantage 4 upgrade. We have been discussing and planning for this for a long time now, and it's about to happen.

Eydie Trautwein agreed with Auditor Racines and stated we are close to the live date for the Advantage 4 upgrade. Currently the project is on track. We have been working closely with the vendor, CGI. We had a very specific deliverable in our contract to make sure that any critical

issues or any go live issues were resolved. The vendor has met that deliverable and we gave the green light to go live. At this point, there aren't any issues that should hold it up. We are now working on final, non-critical issues. Eydie Trautwein thanked the Auditor's team and also CGI for their patience and hard work as we move through this upgrade. Again, everything is on track and on schedule with the original project plan. As a reminder, the system will go down on March 30th and March 31st. The Auditor's team will work over that weekend. We will be down on April 3rd and April 4th. All the upgraded systems will come up on April 5th.

Kris Quick gave an update on the Configuration and Training Subcommittee. He indicated they have completed the final User Acceptance Training (UAT). All of the scripts for infoAdvantage, Payroll and Finance have been completed. There were a few small changes that were made, but overall, the final UAT is looking good.

Mr. Quick stated they are currently turning towards help desk training and ensuring the help desk staff is ready when we go live. We are trying to anticipate questions and the volume that will occur when we go live with the new system. He stated that passwords and user IDs are not going to change. Whatever your password is on March 29th in 3.11, that will be your password in Advantage 4 on April 5th. Other calls they are trying to anticipate are navigational issues – such as getting into the new system, navigational bars, switching to page codes. Internal testing is also being done to have all help desk staff ready and comfortable with any questions they may encounter when we go live.

Mr. Quick said we are finalizing our training. The first training session is March 2nd – General Accounting Expenditures. We won't be live in the new system so no one besides the Auditor's Office will have access to it. The training in March will be virtual and more of a demonstration. We will be running through how everything works. It will still be a training on the actual subject, but more of a demonstration. When we get into April, there will be in-person sessions and more of a hands-on training. Mr. Quick encouraged those in attendance today to have their staff sign up for these training sessions. We have had quite a few people sign up – the first session on March 2nd has over 35 participants already. We have also been working on our training website as well as the videos and materials. Next week you will receive a communication for training which will include the final manuals for Payroll, Finance and infoAdvantage.

Mr. Quick said we are working on performance testing with our vendor. We have identified different reports and processes in the system, such as budget documents, GAX documents and PRCs. They set up testing in the background and they mass load documents into the system. They have run 150 reports at the same time to try to overload the system to make sure that it will be able to keep up with the load once we have everyone in the new system. The only one we are seeing any type of slowness right now is infoAdvantage. We are putting in a lot of effort

to get infoAdvantage working efficiently, if not better (and faster), than in 3.11. Performance testing will take place next week and then we will have the results to make sure everything is running on time and in accordance with our needs.

Kevin Hibbard, Director of the State Budget Department, asked if there would be any opportunities for specialized training? Kris Quick told him he would be happy to set that up – between him and the Accounting Division, they can schedule a day for him and his staff to come in and work on any specialized training they are interested in. Mr. Quick told Mr. Hibbard to reach out to him or Erin Benskin to find a time and day – it can be done in-person or virtual.

Eydie Trautwein stated that what she is envisioning is when we were doing User Acceptance Training sessions, we had several agencies indicate they did not want to participant in general sessions – they wanted dedicated time with the Auditor’s Office so they could have more specific conversations. That has worked quite well. Ms. Trautwein said we can do that with any agency that wants specialized or specific training. It’s easy for us to accommodate. Just give us a few dates that work for you and we’ll get it on the calendar.

Eydie Trautwein gave an update on the Communication and Outreach Subcommittee. She stated we have really ramped up communication around the upgrade. She started with a letter that was sent out on February 6, 2023 to all Directors, Legislative and Judicial Branches. It was sent out in an email and also in the mail. The letter discussed the upgrade and talked about important dates and when the system will be going down. We really wanted to make sure all agencies, at all levels, were aware of what is going on. We have been blasting out communication to individual users, but we wanted to make sure that top to bottom, everybody knows what’s going on and what to expect.

Some of the recommendations we included in the letter, were making sure Directors were meeting with their fiscal staff so they know when the system will be down and if there is going to be any critical payments impacted. We discussed ESS and MSS and encouraged agencies to meet with their HRD representative to facilitate whatever training they thought was appropriate for their agency. We asked them to please sign up for training. All the training sessions are on our website. We encouraged users to perform any document cleanup in the system, preferably before March 6th. We will have until March 29th to get any document cleanup done, so any draft or pending documents in the system need to be moved to final or deleted. We included information about March month-end. There was also a reminder if there are agencies running quarter-end reports or month-end reports to run them before 5:00 p.m. on March 31st. That is when the vendor will take down 3.11 and bring up Advantage 4. Also, just a reminder to agencies if they have technical staff that are processing interfaces to make sure they are aware and are comfortable. If not, to reach out to the Auditor’s Technical Team. We then went through a schedule of all the future communications that will be going out. We

included information about all the training resources and then information about the overall upgrade project. Ms. Trautwein asked the Committee if they felt another letter such as this should go out in March?

Korin Schmidt, Director – Department of Family Services, asked if this question was being asked because of colleagues not in these meetings? She stated if you are asking specifically about her – no, they've received a lot of communication, but if the concern is the larger cabinet, then an abbreviated letter would make sense. Amy Grenfell, Chief Operating Officer – Wyoming Business Council, said that any abbreviated reminder wouldn't hurt. She also stated that with personal taxes due in April, people will be trying to get their W2s and they will be impacted by ESS. She feels a reminder about this would be needed. Ms. Trautwein liked that suggestion and indicated we can just say "as a reminder, we are encouraging employees that need to access W2s to do it before the system goes down".

Ms. Trautwein stated the plan will be to generate an abbreviated letter, probably send it out within the first two weeks of March – in the same way as the February 6th letter, through email and mail.

Eydie Trautwein told the Committee they should have received an email as a state employee about ESS and MSS. Links were included to the September Subject Matter Minute as well as a link to the Auditor's website. This email was also forwarded to the Judicial Branch and the Legislative Service Office as well. Elizabeth Martineau, Senior Fiscal Analyst – Legislative Service Office, confirmed she received the email.

Jerry Rief gave an update on the Technical Subcommittee. He stated they ran through test cycles this month and are getting closer to an issue-free-run. They are making minimal script changes at this point in time. They also have the schedules set up to process the cycles that have been set up on the prod and nonprod regions to update and automate the cycles. They have made modifications to the previous BIRT documents – when you are viewing the documents on-line, you can view and print them. They have included a signature block. This was requested by some agencies that do the formal approval of these documents. They also completed an audit and cleanup of IP addresses to the relay box. There are quite a few and they have accumulated over the years. The request has been made and it is being processed now. Over the next week they should be turned off. If you have somebody that can't get to the relay box, please notify the Auditor's Office and it will be turned back on. Also, as a reminder, COBOL program conversions need to be completed by March, 2024.

Eydie Trautwein thanked the Technical Team. She stated it has been practice after practice on all cycles to make sure there are no issues – running the pay cycle again and again and working with the vendor. She said if any agencies have technical folks who want to refresh their

memory about an interface or have a conversation with Jerry Rief and his team, they are available. We want to make sure everyone is comfortable with how the interfaces will be processed in Advantage 4. Our Technical Team is here as a resource for you.

Auditor Racines thanked the Committee again for attending and told them their input has been very helpful. The next Steering Committee meeting will be on March 24th at 8:30 a.m.