Core Advisory Team Meeting
APRIL 27, 2017
Agenda

I. Introductions of CGI Team Members
II. Wave 1 Kick-off Meetings
III. Informational Bulletin #4560 – Waves Announcement
IV. Reports Survey
V. Questions & Answers
Introduction of CGI Team Members

Paul Landry, BEST Project Director
Wave 1 Kick-off Meetings

Project Management Team
Organizational Change Management Team
Finance Team
Budget Team
Human Capital Management Team
Project Management Team

Paul Landry, BEST Project Director
Mark Kithcart, Project Coordinator
James Colbert, Project Advisor (CGI)
Marvin Cruz, Project Director (CGI)
Maranda Chui, Project Management Lead (CGI)
Project Management Activities

Creation of Detailed Calendars
- Configuration training
- Fit-Gap sessions
- Interfaces planning
- Created for
  - HR/Payroll - April through June
  - Finance and Budget – April through July
  - Interfaces – May through July
- HR/Payroll – Calendar for July through August being built

COA Strawman PowerPoint (~50 Slides)
- Partnership with Finance and Budget Team
BEST Project Implementation Roadmap for Wave 1 Districts
As of March 21, 2017

<table>
<thead>
<tr>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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<tbody>
<tr>
<td>APR</td>
<td>JUL</td>
<td>OCT</td>
<td>JAN</td>
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Business Intelligence - BUD, FIN, & HCM
Organizational Change Management

Wave 1 (7 Agencies)
Post-Production Support (PPS)
Project Management Activities

Completed Wave 1 Agency Kick Off Meetings
- East Whittier City School District
- Paramount Unified School District
- Santa Monica College
- Cerritos College
- Hacienda La Puente Unified School District
- Alhambra Unified School District
- Palisades Charter High School

Currently considering adding one additional Agency
Representative Agency Implementation Activities

**Workflow:** Assist with To-Be Process Designs

**Forms:** Review Usage & Assist with Design

**Reports:** Provide Input for Requirements

**Customizations:** Provide Input for Requirements

**System Configuration:** Provide Input and Vetting

**User Acceptance Testing (UAT):** Assist w/ Performing

**Security Profiles:** Identify Employees, Roles, & Classes

**Training:** Identify users to attend and assist w/ scheduling

**3rd-Party System(s):** Assess impact...Interface to Advantage or Retire?

**Interfaces:** Identify and Assist with Development
Organizational Change Management Team

Mary Lang, Change Management Officer
Christine Guardia, Organizational Change Management Manager (CGI)
Your Change Liaison…
- ... primary point of contact for BEST
- ... attends monthly BEST Project meetings
- ... disseminates information within your agency
- ... coordinates/delegates activities such as
  - ...data conversion, interfaces, testing, etc.
- ... identifies users for training, security, workflow
- ... reviews and updates Agency Readiness Checklist

Our Change Ambassadors…
- ... primary point of contact for BEST who will help your Change Liaison with “All of the Above”
- ... relays all Milestone Messages to Wave 1 in a consistent fashion
- ... accountable party for tracking and sharing your agency’s readiness level for Go-Live
Ideas for Ensuring Liaison | Ambassador Success?

Sample Agency Readiness Checklist

<table>
<thead>
<tr>
<th>MONTH</th>
<th>SECTION</th>
<th>CATEGORY</th>
<th>TARGET DATE</th>
<th>TASK</th>
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<tbody>
<tr>
<td>Jun-17</td>
<td>Policies and Procedures</td>
<td>Internal Procedures</td>
<td>06/30/17</td>
<td>Provide current internal procedures</td>
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<tr>
<td>Jul-17</td>
<td>Reports</td>
<td>Reports</td>
<td>07/15/17</td>
<td>Complete report usage survey to indicate which reports your agency currently uses</td>
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<tr>
<td>Aug-17</td>
<td>Testing</td>
<td>Testing</td>
<td>08/16/17</td>
<td>Identify agency staff to participate in User Acceptance Testing (UAT)</td>
</tr>
<tr>
<td>Sep-17</td>
<td>Security and Workflow</td>
<td>User Management</td>
<td>09/01/17</td>
<td>Submit completed agency Security and Workflow Workbook</td>
</tr>
<tr>
<td>Sep-17</td>
<td>Interfaces</td>
<td>Interface Testing</td>
<td>09/20/17</td>
<td>Verify access to FTP, user access, and setup</td>
</tr>
<tr>
<td>Oct-17</td>
<td>Testing</td>
<td>Testing</td>
<td>10/01/17</td>
<td>Agency User Acceptance Testing (UAT) begins</td>
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Sample Agency Readiness Dashboard

<table>
<thead>
<tr>
<th>Wave 1 Agencies</th>
<th>Conversion</th>
<th>Interfaces</th>
<th>P &amp; P</th>
<th>Reports</th>
<th>S &amp; W</th>
<th>Technical</th>
<th>Testing</th>
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<tr>
<td>Alhambra Unified School District</td>
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<tr>
<td>Cerritos College</td>
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**KEY**

- Completed
- In Progress
- Not Done
- N/A
- No Response
Finance Team

David Chiang, Implementation Expert - Financial
Lisa-Ann Hinkson, Implementation Expert – Financial
Ben Pomeroy, Finance Manager (CGI)
Finance - Accomplishments this Period

Wave 1 Kick-Off Sessions
• Met with seven Wave 1 agencies

CGI Finance Product Walkthrough Training

Configuration Training and Fit-Gap Sessions
• Configuration Training starts on Tuesday, April 25, 2017
• Fit-Gap Sessions start on Monday, May 8, 2017

Started PeopleSoft Data Analysis & Clean-up for Wave 1 agencies
• Duplicate Vendors
• Chart of Accounts
Finance - Accomplishments this Period

Initial Analysis and Mapping of PeopleSoft COA to CGI COA
◦ Review and Compare COA requirements and utilization
  ◦ Standardized Account Code Structure (SACS) – K-12 Districts
  ◦ Budget and Accounting Manual (BAM) – Community Colleges
◦ Effort of Mapping the COA has started
◦ Identifying COA structures for budget control
◦ Analyzing cross-team impacts
Key COA Decision Points To Address

Chart of Account Structures for Budgeting, Control, and Security
  ◦ What are the cross-team impacts based on COA decisions?
  ◦ What are the organizational security and workflow impacts?
  ◦ What are the differences in the COA structures?
    ◦ K-12 Districts
    ◦ Community Colleges

Budget Structures and Control Levels
  ◦ What budget structures are required to provide the right level of spending control for an agency?
  ◦ Will K-12 Districts and Community Colleges require a separate structure and/or level of control?

Reference and Key Configuration Data
  ◦ What are the configuration and reference tables requiring agency-specific records?
  ◦ What is the approach for defining agency-specific records?
Finance – Upcoming Activities Next Period

Requirements Review
◦ Identifying business requirements to defer to a future wave

Configuration Training
◦ Now until June 2017

Fit-Gap Sessions and Configuration Validation
◦ Now until July 2017

Continue PeopleSoft Data Analysis & Clean-up for Wave 1 agencies
Budget Team

David Chiang, Implementation Expert – Financial
Ben Pomeroy, Finance Manager (CGI)
Budget - Accomplishments this Period

CGI Performance Budgeting (PB) Product Walkthrough Training

Configuration Training and Fit-Gap Sessions
- Configuration Training completed on Monday, April 24, 2017
- Fit/Gap Sessions start on Wednesday, May 17, 2017

PB Fit-Gap Session Preparations
- Extensibility Tracking Spreadsheet
- Review LACOE Budget Development Requirements to PB Process Mapping
- Started Development of Validation/Test scenarios

PB Baseline Customization Meetings
Key Decision Points To Address

Budget Adjustments for Current Year Budget
- Where will current year modifications be processed? FIN?
- What will be the frequency of passing current year budget totals back to PB BUD?
- Will interfacing districts send current year adjustments directly to FIN?

Position Control data for Interfacing Only districts
- Will they send over Position Control data for loading into Salary Benefits Forecasting System in PB BUD?
- Will they only send total salary amounts for budget lines?

• Reference and Key Configuration Data
- What are the configuration and reference tables requiring district-specific records?
- What is the approach for defining district-specific records?
Budget – Upcoming Activities Next Period

Fit-Gap Sessions and Configuration Validation
- Complete Development of Validation/Test Scripts
- Complete Configuration of Fit-Gap Database Environment
- Facilitate Eight Fit-Gap Sessions by May 2017

Continue Performance Budget (PB) Baseline Customization Working Sessions
Human Capital Management Team

Sangeeta Gupta, Implementation Expert – Human Resources
Yumeka Seabrooks, Implementation Expert – Payroll
Kathy Steen, Human Capital Management Manager (CGI)
Data Analysis Approach

- Provide HCM Data Workbooks
- Agencies Complete Analysis Workbooks
- Data Analysis & Findings

Data Clean Up

Repeatable Model
## Flex Fields

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<th>A</th>
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<th>C</th>
<th>D</th>
<th>E</th>
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<td>District Code 3</td>
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<td>XRAY</td>
<td>122</td>
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Where We Are

Configuration Training
- Scheduled first two weeks of May
- In process of taking Independent Study Guides

Finalized Fit-Gap Schedule
- Scheduled for May – June 2017
- Calendar for July through August being built
- Script development in process

Requirements Mapping Completed for HCM
Technical Team

Dennis Obrycki, Technical Manager (CGI)
Technical Team Activities

Interfaces/Reports

Interfaces:
- Continuing preliminary review and disposition of legacy interfaces
- Developing Interface Strategy and Plan for Budget system

Reports:
- Reporting Fit-Gap analysis in progress
- Preparing for prototyping reports for Performance Budgeting.
Technical Team Activities

Environments

LACOE “interim” prototype servers delivered
  ◦ Provisioning servers in progress
  ◦ Application installation in progress

Budgeting Prototype environment migration first priority

Remainder of applications will be installed as needed
Mapping BEST Requirements to CGI Processes & Sub-Processes

James Colbert, Engagement Manager (CGI)
EXAMPLE: END-TO-END PROCESSES & PROCESSES GROUPS
Example: End-to-End Process Levels and Decomposition
Informational Bulletin #4560
Waves Announcement

Phillip “Chip” Norris, Administrative Analyst
Interactive Wave Map

<table>
<thead>
<tr>
<th>Wave</th>
<th>Budget</th>
<th>Financial</th>
<th>HCM/Payroll</th>
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<tbody>
<tr>
<td>Wave 1 (7 Agencies)</td>
<td>January 2018</td>
<td>July 2018</td>
<td>January 2019</td>
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<tr>
<td>Wave 2 (26 Agencies)</td>
<td>January 2019</td>
<td>July 2019</td>
<td>January 2020</td>
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<tr>
<td>Wave 3 (57 Agencies)</td>
<td>January 2020</td>
<td>July 2020</td>
<td>January 2021</td>
</tr>
<tr>
<td>Wave 4 (54 Agencies)</td>
<td>January 2021</td>
<td>July 2021</td>
<td>January 2022</td>
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Reports & Data Survey

Mary Lang, Change Management Officer
Help Us Shape Reports & Data in the New BEST Advantage System

Is Your Agency’s Voice Among the 200+ Who Have Spoken up so Far?

Questions:
1. What regulatory reporting is most difficult/challenging?
2. What are the most vital reports you use?

Requests:
- Ethnicity and VOE
- Government Compensation
- Bargaining Unit
- Quarterly Position
- Affordable Care Act (CPRA) Personnel
- OSHA Regulatory Reporting Complete
- System Currently

BestInfo@lacoe.edu
Next Meeting: Thursday, July 27, 2017 – 1:00PM – 2:30PM