Community College Advisory Team Meeting

JULY 28, 2017

Business Enhancement System Transformation
Agenda

I. Project Updates
   A. Interfaces – BUD & FIN (10 min) Claire
   B. Fit-Gap Updates
      a. Performance Budgeting (15 min) Ben/David
      b. Procure-to-Pay (10 min) Lisa-Ann
      c. GL, AR & AM (10 min) Ben/David
      d. Human Capital Management (10 min) Kathy/Yumeka/Sangeeta
   C. Purpose and Tentative Schedule for the Agency Engagement and Regional Configuration/CRP Meetings (10 min) James

II. Team Input
   A. Survey (15 min) Mary/Christine
   B. Budget Conversion (10 min) David/Nicole
      How many years of budget data should we convert?
Project Updates

Interfaces – BUD & FIN

Claire Nguyen, Interfaces, Conversion and Forms Lead (CGI)
BEST Project Implementation Roadmap for Wave 1 Districts
As of May 22, 2017

<table>
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<tr>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
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Business Intelligence - BUD, FIN, & HCM
Organizational Change Management

Wave 1 (8 Agencies)
Post-Production Support (PPS)

BUD
FIN
HCM
BEST Project Timeline – System Transition

LACOE Systems

Wave 1

Wave 2

Wave 3

Wave 4

PC Products

PSFS

HRS

BEST Advantage System

Budgeting (BUD)

Financial (FIN)

Human Capital Management (HCM)

January 2018

July 2018

January 2019
BEST Project Timeline – Wave 1 Agencies

➢ January 2018 to June 2018
  o Budget development will start in BUD
  o Financial transactions and reporting continue to be processed in PSFS
  o HR and payroll functions continue to be processed in HRS

➢ July 2018 to December 2018
  o Approved budget is established in FIN
    o Initial Budgets for BUD users are interfaced from BUD to FIN
    o Initial Budgets for non-BUD users are interfaced to FIN
  o Financial transactions and reporting occur in FIN
  o Vendor payments from payroll will be interfaced from HRS to FIN
  o Interface agencies start sending files for financial transactions (vendors, vouchers, etc.)

➢ January 2019 forward
  o HR and payroll functions will start in HCM
  o Interface agencies start sending files for Time and Leave
Proposed Interface Flow for HCM DRAFT
For Discussion Purposes Only (As of 06/25/2017)
Interface Process – Key Points

➢ **Inbound**
  o Target: BEST Advantage System (BUD, FIN, HCM)
  o Source: Agency systems
  o Input File: Fixed width flat file
  o Correction Process: Rejected transactions can be viewed and fixed online

➢ **Outbound**
  o Target: Agency systems
  o Source: BEST Advantage System (BUD, FIN, HCM)
  o Output File: Fixed width flat file
Project Updates

Fit-Gap Updates – Performance Budgeting (PB)

Ben Pomeroy, Finance Manager (CGI)
David Chiang, Implementation Expert – Finance (BEST)
Performance Budgeting (PB) Accomplishments

➢ Fit Gap Demonstration and Analysis:
  ◦ Delivered/Completed Nine (9) PB Fit Gap Sessions
  ◦ Completed Requirement Traceability Matrix Disposition on LACOE Budget Development Requirements (101) from RFP #1563
  ◦ Continued Working with SFS Support Staff to Map Functionalities Available in Salary Benefit Forecasting System (SBFS) to PC Budget and other PC Products

➢ Completed Preliminary PB Reports Fit Analysis with Reports Team:
  ◦ F38 – Employee Salaries & Benefits Report

➢ Completed Sixteen (16) PB Fit Gap Test Scripts
Performance Budgeting (PB) Upcoming Events

➢ Begin the design work for
  ◦ PB and Advantage Financial Integrations
  ◦ Pre-HCM/FIN Go Live
  ◦ Post-HCM/FIN Go Live
  ◦ SACS Validation Flat File Extract
  ◦ Security and Workflow

➢ User Acceptance Testing (UAT)
  ◦ Wave 1 Districts Participations
    ◦ District Testing Scenarios
    ◦ UAT End User Training
Procure to Pay

Fit-Gap Sessions Update

# of Sessions by Business Area

- Vendor Management - 2
- Procurement - 6
- Contracts Management - 4
- Inventory Management - 4
- Accounts Payable - 11
- Commercial Claims – 1
- Banking - 2

Total: 30 sessions
## Procure to Pay Requirements

### Number of Requirements covered by Business Area

<table>
<thead>
<tr>
<th>Business Area</th>
<th># of Requirements (RFP)</th>
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<tbody>
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<td>Vendor Management</td>
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<td>Contract Management</td>
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<tr>
<td>Inventory Management</td>
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<tr>
<td>Accounts Payable</td>
<td>277</td>
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<tr>
<td>Commercial Claims</td>
<td>15</td>
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<tr>
<td>Banking</td>
<td>37</td>
</tr>
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</table>
What’s the P2P Status?

- Disposition of Requirements for Requirements Traceability Matrix (RTM)
- Creation of List of Potential Modifications (to address gaps not met via Business Process Improvement (BPI) To-Be processes)
- Vendor Data Analysis – Results Workshops with Wave 1 Districts

**Completed:**
- Hacienda La Puente USD
- Cerritos College
- East Whittier City SD
Upcoming Fit-Gap Sessions

Electronic Data Interchange (EDI)
◦ For Electronic processing of Invoices from Utility Companies (e.g. SCE, So Cal Gas)

Month / Year-End Fit-Gap
◦ Requisition and/or Purchase Order Liquidation (Lapse Parameter & Process)
◦ Open Activity Roll (Roll Parameters and Process)
◦ Contract Roll
◦ Receipt Accrual
◦ Inventory Annual Close
Project Updates

Fit-Gap Updates – General Ledger, Accounts Receivable & Asset Management

Ben Pomeroy, Finance Manager (CGI)
David Chiang, Implementation Expert – Finance (BEST)
General Ledger (GL) Accomplishments

➢ Fit Gap Demonstration and Analysis:
  ◦ Delivered/Completed Eleven (15) GL Fit Gap Sessions
  ◦ Remaining – Month/Annual Close Session
  ◦ Created/Proposed Expense Budget Structures for
    ◦ K-12, Charter Schools, JPA, and LACOE
    ◦ Community College Districts
  ◦ Continued Working on Requirement Traceability Matrix Disposition on GL Requirements (151) from RFP #1563
General Ledger (GL) Accomplishments

- Began Preliminary GL Reports Analysis
  - Balance Type Reports
  - Transactions Type Reports

- Created/Proposed Chart of Account (COA) Mappings between PeopleSoft (PFSF) CGI Advantage systems for K-12 and Community College Districts
SACS Chart of Accounts Sample Mapping
Existing PSFS COA to CGI Advantage / Performance Budgeting

<table>
<thead>
<tr>
<th>Existing PSFS COA</th>
<th>CGI Advantage COA</th>
<th>Performance Budgeting</th>
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<tbody>
<tr>
<td>Business Unit</td>
<td>Department</td>
<td>Organization/ Department</td>
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<td>Fund / Sub Fund</td>
<td>Fund / Sub-Fund</td>
<td>Fund / Sub-Fund</td>
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<td>Task / Sub-Task</td>
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<td>Goal</td>
<td>Activity</td>
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<td>Function</td>
<td>Function</td>
<td>User Defined Dimension 1</td>
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<td>Object</td>
<td>Revenue Source &amp; Dept Rev Srce</td>
<td>Budget Object</td>
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<tr>
<td>School / Location</td>
<td>Balance Sheet</td>
<td>Organization / Unit</td>
</tr>
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</table>

FOR INTERNAL DISCUSSION PURPOSES ONLY - DRAFT
BAM Chart of Accounts Sample Mapping
Existing PSFS COA to CGI Advantage / Performance Budgeting

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<th>Existing PSFS COA</th>
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<td>Function</td>
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FOR INTERNAL DISCUSSION PURPOSES ONLY - DRAFT
Accounts Receivable (AR/BI) Accomplishments

➢ Fit Gap Demonstration and Analysis:
  ◦ Delivered/Completed Three (3) AR/BI Fit Gap Sessions
  ◦ Continued Working on Requirement Traceability Matrix Disposition on GL Requirements (93) from RFP #1563

➢ Began Preliminary AR/BI Reports Analysis
  ◦ Balance Type Reports
  ◦ Transactions Type Reports
Accounts Receivable (AR/BI) Upcoming Events

- Fit Gap Demonstration and Analysis:
  - Delivered/Completed Three (3) AR/BI Fit Gap Sessions
  - Continued Working on Requirement Traceability Matrix Disposition on GL Requirements (93) from RFP #1563

- Began Preliminary AR/BI Reports Analysis
  - Balance Type Reports
  - Transactions Type Reports
Asset Management (AM) Accomplishments

➢ Fit Gap Demonstration and Analysis:
  ◦ Delivered/Completed Four (4) AM Fit Gap Sessions
  ◦ Continued Working on Requirement Traceability Matrix Disposition on GL Requirements (101) from RFP #1563

➢ Began Preliminary AM Report Analysis
  ◦ Balance Type Reports
  ◦ Transactions Type Reports
Asset Management (AM) Upcoming Events

➢ Fit Gap Demonstration and Analysis:
  ◦ Delivered/Completed Four (4) AM Fit Gap Sessions
  ◦ Continued Working on Requirement Traceability Matrix Disposition on GL Requirements (101) from RFP #1563

➢ Began Preliminary AM Report Analysis
  ◦ Balance Type Reports
  ◦ Transactions Type Reports
Upcoming Events

➢ Fit Gap Demonstration and Analysis:
  ◦ Application configurations
  ◦ To-Be designs
  ◦ Development designs
  ◦ Reports
  ◦ Forms
  ◦ Conversions
  ◦ Interfaces
  ◦ Customizations
  ◦ Initiate the Integrated System Test
  ◦ Collaborate on data identification and accumulation
Project Updates

*Fit-Gap Updates – Human Capital Management (HCM)*

Kathy Steen, Human Capital Management Manager (CGI)
Sangeeta Gupta, Implementation Expert – Human Resources (BEST)
Yumeka Seabrooks, Implementation Expert – Payroll (BEST)
HCM - Accomplishments this Period

Completed all LACOE Fit Gap Sessions
- 39 sessions completed
- SFS Operations/SFS Financials
- ADS&S

Agency Fit Gap Sessions
- 19 Sessions, 10 completed
- Great attendance and participation

Data Analysis
- Completed all initial agency meetings
- Workbook Review and Completion In-Progress
HCM – Upcoming Activities Next Period

Documentation of all Fit-Gap Results (LACOE & Agency)

Fit-Gap Follow-up Sessions
  ◦ Cross-functional Activities (3rd party payments, payroll tax payments, data conversion, etc.)

To-Be Process Documentation

Defining HCM Scope

Data Analysis Workbook Review for cleanup
Project Updates

Purpose and Tentative Schedule for the Agency Engagement and Regional Configuration Meetings

James Colbert, Engagement Manager (CGI)
Upcoming Agency Engagement Meetings

Purpose and Key Items

- Provide recap of Budget and Financial functional areas covered during Fit-Gap
- Obtain agency feedback on Fit-Gap sessions
- Discuss core functionality in scope for Waves 1 – 4
- Explain considerations behind what core functionality will be provided in Waves 1 – 4
- Request agencies to begin to consider the in scope functionality that will be used
- Provide schedule for upcoming Agency Engagement meetings
- Provide purpose and schedule for upcoming Regional Meetings

Audience

- Wave 1 Agencies
Upcoming Agency Engagement Meetings

Core Functionality

Scope

Decision Approach

- Review functionality currently being used by LACOE and agencies
- Review Fit-Gap results for the functionality currently used and potential additional functionality that can be implemented
- Develop plan for functionality to be used in Waves 1 – 4 in the BEST Advantage system
# Upcoming Agency Engagement Meetings

## Snapshot of Core Functionality Scope Decision Document

### Core Func Scope Decision

### Business Area | Major Functionality as Prototyped in Fit-Gap Sessions | Currently Available | BEST Project Initial Suggested Rollout Approach | Planned Functionality Approach for Phase 3
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<td><strong>Inventory Management</strong></td>
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<td>Warehouse (WHSE)</td>
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<td>Inventory (INV)</td>
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<tr>
<td>Purchasing into Inventory</td>
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<td>Inventory Commodities (SFA)</td>
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<td>Issuing items from the Warehouse (Direct &amp; Indirect)</td>
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<td>Over-the-Counter (OTC)</td>
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<td>Stock Request (SRQ)</td>
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<td>Quick Entry (Express) SRQ Customization</td>
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<td>Pick and Issue (PI)</td>
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<td>Issue Confirmation (IC)</td>
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<td>Returning items to Warehouse</td>
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<td>Stock Return (SN)</td>
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<tr>
<td>Transfer Between Warehouses</td>
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<td>Stock Transfer In (TI)</td>
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<td>Stock Transfer Receipt (TR)</td>
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<td>Manual Adjustments</td>
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<td>Batch Processes</td>
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<td>Replenishment</td>
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<td>Cycle Counting</td>
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<td>Forms (Pick &amp; Issue)</td>
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<td>Payment Tolerances</td>
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<td>Vendor Setup and Maintenance</td>
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<td>Vendor Customer Creation (VCC)</td>
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<td><strong>All Districts</strong></td>
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<td>- Vendors</td>
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<td>- Circumstances for Utilities (Freedled)</td>
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<td>- Banknote</td>
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<td><strong>Phase 3</strong>: VCC, VOM, IN, GAC, GAG, PRC, PRM, PDT, DRM, MO, AD, EFT, DC, JV, VCC, GAC, TA, TE, TP, or TRAIGHT TRAVEL</td>
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<td><strong>Accounts Payable Setup</strong></td>
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Upcoming Agency Engagement Meetings

BEST Advantage Budget System

Friday, August 25, 2017 9:00 AM -11:00 AM
LACOE, Education Center West, 12830 Columbia Way Downey, CA 90242 (Room: Conference Center A)

BEST Advantage Financial System

Monday, October 16, 2017 9:00 AM-4:00 PM
LACOE, Education Center, 9300 Imperial Hwy, Downey, CA 90242 (Room: EC-281)
Upcoming Regional Configuration Meetings

Purpose and Key Items

- Demonstrate the configured BEST Advantage Budget and Financial systems
- Conduct Conference Room Pilots to receive input about functionality
- Communicate the core functionality in scope for Waves 1 – 4
- Request Wave 1 agencies further consider and solidify functionality that will be used

Audience

- All Agencies (Wave 1 – 4)
Upcoming Regional Configuration Meetings

BEST Advantage Budget System

**LACOE**
Thursday, September 07, 2017 8:30 AM-12:30 PM
LACOE, Education Center West, 12830 Columbia Way Downey, CA 90242
(Room: Conference Center B)

**North County**
Tuesday, September 12, 2017 8:30 AM-12:30 PM
College of the Canyons (Room: 258)

**East County**
Thursday, September 14, 2017 8:30 AM-12:30 PM
Kellogg West Conference Center, 3801 W. Temple Avenue, Pomona, CA 91768
Upcoming Regional Configuration Meetings

BEST Advantage Financial System

LACOE
- 1st Meeting: Monday, December 04, 2017 8:00 AM-4:00 PM
  LACOE, Education Center, 9300 Imperial Hwy, Downey, CA 90242 (Room: Boardroom EC-100)
- 2nd Meeting: Monday, January 29, 2018 8:00 AM-3:30 PM
  LACOE, Education Center West, 12830 Columbia Way Downey, CA 90242 (Room: Conference Center)

North County
- 1st Meeting: Wednesday, December 06, 2017 8:00 AM-4:00 PM
  College of the Canyons (Room: 258)
- 2nd Meeting: Wednesday, January 24, 2018 8:00 AM-4:00 PM
  College of the Canyons (Room: 258)

East County
- 1st Meeting: Monday, December 11, 2017 8:00 AM-4:00 PM
  Kellogg West Conference Center, 3801 W. Temple Avenue, Pomona, CA 91768
- 2nd Meeting: Wednesday, January 31, 2018 8:00 AM-4:00 PM
  Kellogg West Conference Center, 3801 W. Temple Avenue, Pomona, CA 91768
Team Input

Survey

Mary Lang, Change Management Officer (BEST)
Christine Guardia, Organizational Change Management Manager (CGI)
We’ve Got Your Number(s)

The BEST Project Data Survey
Preliminary Findings for Business Intelligence Development
from May 8, 2017 Survey
The BEST Project Reporting Needs Survey

Who Responded?
All Four Waves & All Types of Agencies

Responses by Wave
- Wave 4: 91 Responses (28%)
- Wave 3: 81 Responses (25%)
- Wave 2: 92 Responses (29%)
- Wave 1: 59 Responses (18%)

STRONG ENGAGEMENT
All implementation Waves had healthy participation, both early Waves and later Waves.

Responses by Agency Type
- K-12: 262 Responses (81%)
- College: 42 Responses (13%)
- Charter School: 8 Responses (3%)
- JPA: 7 Responses (2%)
- ROP: 4 Responses (1%)

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Top 10 Requested Report Categories

1. LAGL/LCGL Reports (919C, 019C, 037, 819, 008S)
2. PAYR Reports (095, 121, PP6600, 130, 096)
3. LAAP Reports (029S, 140C, 029)
4. Credential (PERS750, AIMS030)
5. PC Product Downloads
6. Change Registers (AIMS140, AIMS024)
7. Suspense Register (LACSUREG)
8. Quarterly Totals Accumulators (PPCNVCHK)
9. Department Notification (PERS111)
10. Budget to Actual Reports
Top 10 Requested Reports

1. Payroll Audit Register (PAYR095)
2. Detailed Deduction Report (PAYR121)
3. Cumulative Detail (LAGL919C)
4. Cumulative Detail (LAGL019C)
5. Trial Balance by Resource (LAGL037S)
6. Cumulative Detail (LAGL819C)
7. PC Product Downloads
8. Payroll Accounting Report by Employee (PP6600)
9. Suspense Register (LACSUREG)
10. Trial Balance by Fund (LAGL008S)
Help Shape the BEST Advantage System

OK. But how?

Learn About Data & Reports today vs. in Advantage

Agency Voice

Now What?

Agencies

Budget & Finance Team

Human Resources & Payroll Team

Reports & Data Leads

BEST

Budget & Financials Team
Ben, David, Lisa-Ann

HCM & Payroll Team
Kathy, Yumeka, Sangeeta

Business Intelligence
Arun

Connect With Your BEST 1 TEAM Partner(s)
Customer Resource Center (CRC)

**Purpose:** The CRC is a comprehensive, full-featured ERP portal for agencies and users to access BEST Project implementation information and tools throughout their wave and after go-live.

**Vision:** The CRC is a password-protected website with a link from the BEST Project Homepage ([www.lacoed.edu/BEST](http://www.lacoed.edu/BEST)).

**Timing:** Approximately October 2017.
Team Input

Budget Conversion

Question: How many years of budget data should we convert?

David Chiang, Implementation Expert - Finance (BEST)
Nicole Butt, Budget Lead (CGI)
Next Meeting: Thursday, October 27, 2017 – 9:00AM – 10:30AM
Items in red boxes may involve technical integration

*Document Sharing such as via Google Drive

**Quick links to be included in all the pages depending on the content