

Monthly Status Report

Reporting Month:	March 2024
Report Number:	006
Submission Date:	04/02/2024
Project:	State of Nevada Full Suite Advantage 4 System Integration
Project Leadership:	<p>██████████ [Program Director, BerryDunn / OPM]</p> <p>██████████ [Project Manager, CGI (Interim)]</p>
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*Green – On Track | Yellow – At Risk | Red – Off Track

Summary:

The CORE.NV Project is transitioning into the Build Phase with the completion of the HRM Discovery workshops. The HRM Team delivered part 1 of the Discovery workshop and Business Process Analysis documents and initiated Build Phase activities. The FIN Team completed the FIN Envision Phase deliverables and are wrapping up Sprint 1.3. Build Phase activities for FIN include working on Accounts Payable and Account Receivable transactions among other team plans in PI 1. The OCM team implemented plan activities including hosting virtual coffee talks, drafting statewide leadership memos, and facilitating the project assessment process. The new training team formed and began developing the approach for state trainers (TtTs) and end user training.

The Technical team has been focusing on Conversions, Tech trainings, and delivery of the Strategy documents.

Detailed updates can be found below in each of the respective project workstreams.

Project Management Office (PMO) Activities

The PMO focused on March deliverables, schedule management activities, and PMO operations.

PMO Operations

- CGI PMO onboarded seven (7) and offboarded three (3) CGI project staff for the project. We continue to collect fingerprinting documentation and background checks. Identification badges are in process for the newest onboards. Printed Badges were provided to staff in February.
- Project level Risk and Issue field types were updated in Jira to align with PMP and the BerryDunn RAID log.

Schedule Management & Deliverables

- The Project Schedule .mpp file was approved on 3/08/2024. The Project Schedule management process officially kicked-off on the week of 3/11/2024 with the approval of the baseline schedule. This process will primarily leverage the CGI and OPM Staff Tasks List Report and 30-day look ahead Report for schedule updates.
- Roadmap view by Phase was incorporated into the Project Status Report.
- The following Project deliverables scheduled for March were submitted to OPM:
 - Project Schedule .mpp file – Approved 3/8/2024
 - P1A Business Process Analysis Findings 1 – Approved 3/11/2024.
 - Monthly Status Report #5 (Feb 2024) – Approved 3/15/2024
 - Forms, Reports, Conversion Strategy – Approved 3/19/2024.
 - Interface Strategy – Resubmitted 3/27/2024
 - P1A Program Increment Objectives – Approved 3/29/2024.
 - P1A Discovery Workshops Findings 2 – Approved 3/29/2024.
 - P1A Business Process Analysis Findings 2 – Approved 3/29/2024.

Scope Management:

- Change Request - CR009 – Interface and Integration Strategy Split Deliverable split was approved by OPM for Change Control Committee on 3/26/2024.

Organizational Change Management (OCM) and Communications

In March, OCM continued to implement the OCM and Communications Plan. Specifically, the OCM team:

- Participated in the HRM Discovery Workshop retrospective.
- In support of the Change Agent Network (CAN), drafted a comms memo for Statewide leadership to nominate CAN members, drafted an email invitation to invite select leaders to become CAN sponsors, finalized the CAN invitee list, and drafted invite language for 04/11/2024 CAN kick-off. Began developing slides and visuals for the 04/11/2024 deck.
- In support of a Virtual Coffee Talk for Directors and Deputy Directors, created slides and finalized an invitee list. Provided note-taking support at this 03/27/2024 event.
- Facilitated an assessment of the CORE.NV project with OPM leadership using the Prosci Change Triangle (PCT) and the Prosci Risk Assessment. Documented findings and proposed a way forward, which includes a regular project health review using the PCT at the beginning of each PI with all OPM leads.

- Researched, determined the analytical approach, and drafted a CORE.NV organizational analysis. This work product was accepted by OPM on 03/28/2024.
- Evaluated methods and determined the way forward to input into a Change Impact Assessment. As part of this work, reviewed the FIN Business Process Analysis and Discovery Workshop documents.
- Provided graphics, layout support, and enhancement to the new CORE.NV SharePoint site geared towards all State Employees.
- Visualized the State of Nevada organization chart to enumerate entities currently using Advantage 2.1; this tool will be used to determine future stakeholder engagement.
- Began developing OCM metrics, which are to be finalized at the start of Program Increment 2.
- Managed OCM activities as part of Program Increment 1. Continued to refine and input OCM tasks into JIRA.
- Continued to host a daily OCM Stand-up meeting with OPM leadership to discuss work in progress; tracked status with Kanban board.

Training

In March, the new Training Lead, [REDACTED] and Training SME, [REDACTED], were onboarded and began work. The Training Team performed the following actions:

- Hosted twice-weekly training team meetings with all team members.
- Began building out comprehensive approaches for training both State Trainers and End-Users.
- Gathered and determined learning approach and materials requirements for State Trainers.
- Developed a State Trainer skills and capability matrix.
- Developed a survey to gather feedback from potential State Trainers.
- Began researching and drafting audience analysis for FIN and HRM end-user training.
- Developed a survey to gather feedback from FIN End-Users projected to be involved in training.
- Provided feedback to UAT communications artifacts.

Human Resource Management (HRM)

The HRM Discovery Workshops wrapped up in March. The team completed all the functional and technical area workshops and started working on the Discovery deliverable documents. Highlights of work completed in February include:

- Completed Security, Workflow, and Forms discovery workshops.
- Drafted Part 1 of both the Discovery Workshop Findings and Business Process Analysis Findings documents, delivered to the State for review.
- Began drafting Part 2 of both the Discovery Workshop Findings and Business Process Analysis Findings, slated for delivery in April.
- Started planning for PI2.

Looking ahead we are preparing for build by mapping out our dependencies and planning our conversion, scripting, and testing effort.

Financial

The month of March focused on the Build Stage of the project, specifically sprints 1.2 and 1.3 in Program Increment 1 (PI1). The objective of PI1 for the Financial Configuration Workstream was to configure tables and transactions for Accounts Payable and Accounts Receivable, and to begin to configure tables for Budget, COA, and General Accounting. In addition to this the Financial Configuration Workstream also completed their work on the Discovery Workshop Findings and Business Process Analysis Findings Part 2 documents. The full list of achievements is listed below:

- Submitted final updates for the Business Process Analysis Findings Part 1 document.
- Submitted the Discovery Workshop Findings Part 2 Document.
- Submitted the Business Process Analysis Findings Part 2 Document.
- Completed Build Sprints 1.2 and 1.3 including:
 - Conducted Build meetings:
 - Accounts Receivable – 7 meetings.
 - Procurement – 5 meetings.
 - Cost Accounting/COA – 7 Meetings.
 - General Accounting – 2 meetings.
 - 1099 Mapping Conversion – 1 meeting.
 - Configured tables and Transactions, Wrote and Executed SIT scripts:
 - Accounts Receivable
 - Configured 10 tables and transactions.
 - Wrote 5 SIT scripts
 - Executed 1 SIT Script
 - Purchasing
 - Configured 5 tables and transactions
 - Wrote 5 SIT scripts.
 - Executed 1 SIT Script.
 - General Accounting
 - Configured 6 tables.
 - Wrote 1 SIT script.
 - Budget/COA
 - Loaded sample budgets for Budget Build Discussion.
 - Mapped the Chart of Accounts COA tables.
 - Wrote 1 SIT script.
 - Completed the Sprint Demo for sprint 1.3.

Technical

CGI's technical workstream has focused on the following pre-work and build activities during the month of March. The area of focus for the month of March was – FIN Conversions, Technical Trainings, Development of Initial Reports and Delivery of Strategy documents.

- The OPM tech team was provided access to the environments and databases. Database connectivity was set up and successfully tested.
- Review comments from the State for the Conversion, Forms, and Reports Strategy document were incorporated and submitted. The document has been approved and accepted.
- The Interface Strategy document was initially submitted March 8th. An issue related to a STFP process caused the document to go on hold for further discussion. Resolution expected in April.
- Planned technical training for the State Staff has been conducted. One of the training sessions - The [REDACTED] practical session could not be conducted and will be postponed.
- Conversion development for FIN is underway as part of Sprint 1, 2, and 3. COA tables from Iteration 1 and Iteration 2 have been converted to Advantage 4.X and loaded as planned. A fresh set of data was requested from the State, which will be used for conversions. The Tech team has been collaborating with the FIN teams for questions on table conversion.
- Preparation work for HRM conversion has begun. Mapping spreadsheets are being created.
- Development of the initial set of financial reports has been completed. The Tech team will be working with the FIN teams for review and feedback on future Sprints and PIs.
- The team is executing the build phase in sprints as part of the PI. Daily Stand-up meetings, Backlog refinement, and Sprint Demos are being conducted as part of the agile activities.

30, 60, and 90-Day Look Ahead

April 2024

- March Monthly Status Report #6 submission – 4/2/24
- Phase 1B Program Increment Objectives – 4/15/24
- P1A PI1 Completion Report – 4/23/24
- P1B Part 2 Discovery Workshops Findings – 4/15/24
- P1B Part 2 Business Process Analysis Findings – 4/9/24
- P1B Envision Stage Complete – 4/29/24

May 2024

- April Monthly Status Report #7 submission – 5/2/2024
- Phase 1A Training Materials – 5/9/2024

June 2024

- April Monthly Status Report #8 submission – 6/4/2024
- P1A PI2 Completion Report – 6/18/2024
- P1B PI2 Completion Report – 6/18/2024

High Level Status:

- Overall Project Timeline
 - Financial Management: Phase 1
 - Human Resource Management: Phase 1

