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Improving efficiency, management decision-making, transparency, and customer service for the State of Kansas

SMART

Statewide Management, Accounting and Reporting Tool

ROLLING OUT SMART TRAINING

Training Kickoff, Pilot Training, and Teachback Sessions prepare materials and agency trainers

Agency trainers participated in the Train-the-Trainer Kickoff that occurred on January 27.

The Sunflower Project's Training Team held its Train-the-Trainer (TTT) Kickoff on January 27 (please see the article in our January 2010 edition). On February 1 they began piloting the training with agency trainers. In March, end-users can begin their Web-Based Training (WBT) for courses that are prerequisites to Instructor-Led Training (ILT) that will begin in April. Even now, the Training Team is translating results from agency role-mapping activities into curriculum assignments that will direct the Statewide Management, Accounting and Reporting Tool (SMART) end-users to the training they must complete to receive their security access. Agencies must complete the role mapping exercise in order for the training team to plan end-user curriculums.

"The SMART trainers and the drivers that assist them are volunteers from agencies," explains Gina Vinyard, State of Kansas Training Lead. "Before the Kickoff, they completed some fundamental WBT courses. The Kickoff was an opportunity for them to learn about the course materials the project developed for each course and to finalize changes to their assigned training dates. It also gave them an introduction to basic training skills for classroom management and helping learners that may be struggling."

(cont. on p. 9)

HIGHWAY PATROL PREPARING FOR STATEWIDE SYSTEM

SMART will be the statewide agency's first centralized fiscal system

Sheryl Weller, Chief Fiscal Officer for the Kansas Highway Patrol (KHP), knows that the shift to the new Statewide Management, Accounting and Reporting Tool (SMART) will be a culture change for many of the KHP's employees. While many agencies are transitioning from one central financial system to SMART, KHP is shifting from using decentralized accounting processes to sharing a statewide financial management system. "The KHP has some internal systems that assist financial functions," she says. "We have not had an agency accounting system, nor the technological benefits a system like SMART can provide. Many employees within the KHP have not had access to statewide systems before, so SMART will be a fairly significant change for them." The KHP's centralized Fiscal Department has been hard at work preparing those employees for the changes.

KANSAS HIGHWAY PATROL

SMART SHARING

Weller's team has been talking with each other, and with affected KHP employees, about SMART and what it means. "Each month, we make sure our Fiscal employees see the SMART newsletter as it comes out," she says. "In October, I sent Fiscal employees, administrative employees, and managers an agency-wide memorandum that detailed specific changes that SMART will impart on KHP, such as electronic workflow. It also explained that all employees with access to SMART will be required to attend training."

(cont. on p. 8)

PEGGY'S PERSPECTIVES

A Message From the Sunflower Project Deputy Director Peggy Hanna

Someday I'll… (you fill in the blank). Have you ever played that game? We all did it when we were little kids. Someday I'll: learn to drive…go to college…get out of my parent's house and have my own place, have a career, and then I can have a life of my own.

Then we realized to achieve those dreams we actually had to put forth some effort – they didn't just happen by themselves. We had to study to succeed in school or practice while learning to drive; we had to get a job and earn some money to get our own place and have our own lives.

Many of us had a dream a few years ago: to replace STARS with a better accounting system that will let us get rid of the off-line spreadsheets and shadow systems we've developed over the years. Then we would be able to quickly produce reports that would help us really know what is going on with our finances. Someday, someday….

Well, guess what?!?!? Someday is almost here: we are less than five months away from go-live with the Statewide Management, Accounting and Report Tool (SMART)! And like every dream that we want to become a reality, SMART requires a lot of work from each of us. We've all examined how we do business now; then we asked you to imagine how an integrated system like SMART will work only by giving you descriptions and looking at screen shots because that was all we had.

> Our dream is to replace STARS with an accounting system that will let us get rid of the off-line spreadsheets and shadow systems developed over the years.

Now we are asking you to understand workflow so you can do your role mapping so you can register your staff for the appropriate training courses. In turn, completing these courses will let them have security access to SMART. We know this is a lot for you, so if you don't understand what is expected or what you need to do – ASK! Your liaison and our finance team are here to assist you.

In addition, some of your agencies have programmatic systems that will interface with SMART –. As you know, we have a tight schedule for testing interfaces and have been contacting your agency if you have not met the schedules. We feel this is important to you because if your interfaces are not ready you may have to enter hundreds of transactions on-line in SMART that you are accustomed to sending to STARS or SOKI via a data set.

You have all been very dedicated and we still have some intense times ahead. Hang in there with us and someday we will all look back on this time and know the effort was well worth it!

INTERFACE & CONVERSION TESTING NEARS FINAL STAGES

Keeping on schedule important for agencies

"We're deep into processing our Mock 2 conversion right now," Jenny Brately, Accenture Conversion Lead says about Conversion Team activity. "We've been processing agencies' Mock 2 conversion test files, and we're preparing feedback for them on how things went." Brately says agency Technical Contacts and Project Management Contacts, and some functional area contacts, should expect to see feedback on the mock conversion before March. "It is important that the Mock 3 files that are due on March 5 contain all the corrections we ask for when we return their Mock 2 file results, as well as data changes they have on their end."

"With the mock conversions, we've also made corrections to our processes," she says. "The mocks are trial runs of the real conversions that will happen at cutover. Our goal is to work out all the kinks now so the process is smooth when we convert data in the actual production environment. Those lessons comprise feedback we share with the agencies. The more closely they follow that feedback, the better their agencies' data will convert for go-live on July 1."

Brately's counterpart on the Interface Team is Zack Keys from Accenture. His team is also deeply involved in their testing. "Right now, we're finishing up the final interface testing, Stage 6," he says. "This means agencies using interfaces are completing all conditions for accepting each interface they are using. Quite a few interfacing agencies have taken advantage of our test lab where they can view transactions or errors."

Although they are completing Stage 6, the Interface Team still faces a good amount of work before go-live. "Our to-do list includes processing interface files, working on the plans for cutover, coordinating with various systems tests, and keeping the agencies informed," says Keys. "We are continuing our daily conference calls and our monthly meetings. We want to hear about progress from the agencies, so we ask that they stay in close contact with us and take advantage of our office hours and test labs. They can always email questions they have about their testing processes or results to us, too."

Brately stresses that agencies should keep their data updated. "Getting new assets, projects, customers, and the like into their existing systems, and including them in the next conversion file due on March 5 will be helpful. Since that is the final mock conversion, the more data we can put into it, the more smoothly actual conversion will go. We understand that some new data will exist at conversion that has not been part of a mock. However, keeping this year's data current will pay huge dividends when we actually convert."

She also notes the short turnaround time between agency receipt of Mock 2 feedback and when Mock 3 is due. "We suggest agencies have resources in place so they can quickly turn the feedback around and submit their updated files," she says.

CUTOVER ACTIVITIES EXPLAINED

Dates, timelines, and activities are available on the SMART website

Change Agent Network Meeting #8 on January 27 devoted a good amount of time to the subject of cutover—that period during which agencies will convert from their legacy systems including STARS and SOKI to the new business processes in the Statewide Management, Accounting and Reporting Tool (SMART). A calendar of cutover activities and events is on the SMART website (http://da.ks.gov/smart/) for agencies to refer to. Cutover deployment will begin on June 7 and be complete on July 19.

Peggy Hanna, Sunflower Project Deputy Director and State of Kansas Cutover Lead, and Amy Kuck, Accenture Cutover Lead, have created a detailed cutover plan that involves the Sunflower Project team, representatives from central agencies, and individuals within agencies. "Our plan shows dependencies, timeframes, and owners for each action," says Hanna. "The whole point is to create a successful transition from central and legacy systems to SMART."

The project will conduct a dry run, which is the first coordinated run of the cutover checklist. "Our dry run will validate all the cutover items, their dependencies, and their resources," says Kuck. "We'll convert data to the production environment, enter transactions, and execute interfaces. We'll start that in March and run through mid-April. At the same time, we're asking agencies to conduct their own dry runs."

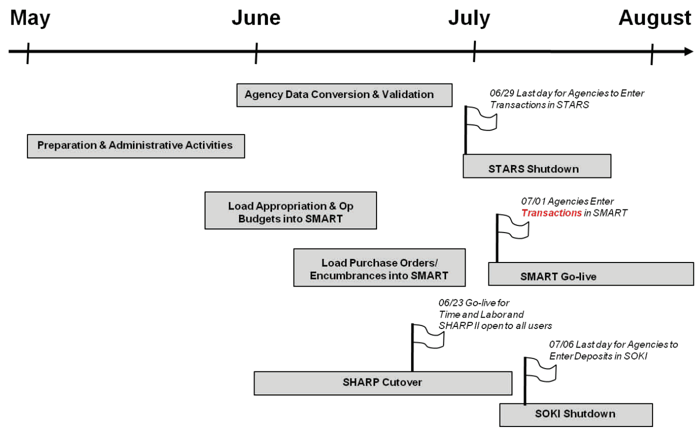
Kuck says "Agencies should conduct at least one and preferably more of their own dry runs in late March or April. Their goal should be to validate their activity sequencing, their procedures, roles and responsibilities, and the like. It will also be important for agencies to review their outstanding interfunds, journal vouchers, and encumbrances that are in STARS and SOKI. Agencies should make any corrections necessary, or remove old transactions. And by all means, they should keep on schedule with their interface and conversion testing. These activities will help agencies and the project have a smooth transition."

> In preparing for cutover, it is important for agencies to review business processes.
>
> PEGGY HANNA

"It will also be important for agencies to review business processes," adds Hanna. "What are the agency's normal year-end activities? How will those activities be affected by the cutover calendar? What transactions or validations need to be performed earlier than normal in June?"

STARS, SOKI, and SMART will be concurrently transactional from July 1 through July 6, Hanna and Kuck say. STARS will receive Fiscal Year 2010 transactions from SOKI while all FY2011 transactions will be conducted solely in SMART. The last day for agencies to enter transactions in STARS will be June 29 (not June 30 as stated in last month's article); the last day to enter FY10 receipts into SOKI will be July 6. This will allow ending general ledger balances from FY2010 to be extracted from STARS and loaded to SMART in mid-July.

Vendors existing in STARS will convert to SMART on June 7; after that, new vendors will be manually keyed into SMART. Hanna and Kuck say instructions regarding how to work with the Division of Accounts & Reports to add SMART vendors between June 7 and 30 will be available later this spring. If a vendor will not be used in SMART within the first few weeks of July, agencies should consider waiting until after SMART go-live for loading.



Sunflower Project representatives discussed this high-level Cutover Activities Timeline at the January Change Agent Network Meeting. The full presentation is available on the SMART website at http://da.ks.gov/smart/Documents/CAN8_Presentation_2010-01-20.ppt

"Dress rehearsal is the final practice run for cutover, and it will operate 24/7," she says. "This will allow us to fine-tune the checklist and timing, and will prepare us to actually execute the cutover. We'll perform the dress rehearsal in mid-April. Once that's done, we'll run an operational readiness test that will ensure we're ready to go live."

Kuck and Hanna pointed out that the project continues to refine the cutover schedule. The project will keep agencies informed as cutover details become available, and will let agencies know of changes that may affect dates.

Don't forget to go to the Agency Meeting Calendar on the Change Agent Network section of the SMART website: http://da.ks.gov/smart/changeagentnetwork.html

This helpful 2-month calendar is updated the first of each month.

INTERFUND FUNCTIONALITY IN SMART

Customizations made to delivered PeopleSoft Financials modules

When the Sunflower Project identified more than 60 interfund processing requirements for the Statewide Management, Accounting and Reporting Tool (SMART), it came to the conclusion that customization of the PeopleSoft product was the best way to manage those requirements. The high number of interfund transactions, conducted by a high number of users, caused the customization to make sense (see the article in our June 2009 edition).

Muriah Baker, Sunflower Project Accounts Receivable/ Billing Team Member, says agencies should find that the overall look and feel of SMART's interfund page is similar to SOKI. "Users will have the ability to see both sides of an interfund transaction," she says. "Receiving and paying agencies, accounting on both sides of the transaction, seeing who created and approved the deposit and voucher—it's all there."

"The interfund page will allow agencies to enter interfund deposits and vouchers independently," she says. "They will be able to control notification and approval of those transactions. The interfund page links to SMART's deposit and voucher pages, making it very similar to non-interfund deposit and voucher transactions. Similar to SOKI, both sides of the interfund must be complete and approved before further processing can be done."

> The project team is enjoying the process of testing SMART's interfund functionality

If agencies are interfacing the payment side of interfunds they will use INF02, Voucher Load or INF50, Voucher Spreadsheet Upload for Payments. Agencies interfacing the receipt side of interfunds will use either INF43, Excel Deposit Upload or INF44, Inbound Deposit. Both sides of the interfund can be interfaced into SMART but there is a manual process for attaching the reciprocating side of the interfund when using the interfaces."

"SMART users who create an interfund will select the contacts inside the agency they wish to notify of the interfund," says Baker. The name, email, and phone number of the users creating and approving interfunds will be automatically linked to the transaction. A process change the Division of Accounts & Reports (A&R) will implement is that they will no longer audit and approve interfunds before they process. Once SMART goes live, A&R will perform post-audits of interfunds. Also, SMART uses an auto-numbered Interfund ID to tie together the Deposit ID and Voucher ID within the system. Finally, users will find that SOKI's 'Description of Material or Service' field is replaced in SMART with a free-form comment field. The comments that used to go in the description field will now go in this free-form field that will take up to 2000 characters."

Baker says the project team is enjoying testing the new interfund functionality. "It is great to finally touch something that we have been in the process of creating for several months," she says. "Because the interfund page is totally custom, it is imperative that we test the process rigorously to ensure that it works correctly. We're very pleased with the way it is working."

AGENCIES IDENTIFY SMART HELP DESK CONTACTS

SMART help desk support begins at the agencies

The Sunflower Project is preparing for the Statewide Management, Accounting and Reporting Tool (SMART) help desk that will be available to assist the agencies with requests for assistance and resolve issues once the system is deployed in July 2010. In January, agencies attended Change Agent Network Meeting #8 where Connie Guerrero, Sunflower Project Enterprise Readiness Manager, explained the SMART support structure . "It is composed of four tiers who will work together on end-user support issues," she said. The first level of the tiered support will begin at the agencies. Guerrero asked the agencies to designate a SMART Help Desk Contact, "This is a person or multiple people in their agency that will be subject matter experts in business process areas or a regional contact for their agency. The Help Desk Contact will be a central point of contact between the agency end-users and the SMART help desk."

SMART end-users will utilize the expertise of the agency's SMART Help Desk Contact to try to resolve any incidents at the agency level before an incident is logged with the help desk. The SMART Help Desk Contact will be able to access a myriad of support tools that will available from the SMART Website. These range from Web-based training, User Productivity Kits (UPK's), and the SMART Help Desk Web-based Tool which contains a database of solutions, articles about common requests, incident history, and a self-service incident reporting feature. By having centralized SMART Help Desk Contacts, agencies will build system expertise and play an important role in bringing incidents with SMART to a quick resolution.

(cont. on p. 7)

MEET THE BUSINESS INTELLIGENCE/ DATA WAREHOUSE TEAM

Team helps make information available for better decision-making and financial management

Given the Sunflower Project's mission to increase transparency and improve information available to State agencies for their decision-making and to improve their efficiency, the Business Intelligence and Data Warehouse (BI/DW) functionalities of the Statewide Management, Accounting and Reporting Tool (SMART) and SHARP are especially important. Andy Kapp is the State's BI/DW Architect and Administrator for the project. Accenture team members include Jeff Pond, BI/DW Team Manager; Prakash Gadde, BI/DW Team Lead; Julie Steele, BI/DW Test Lead; and Sara DeHaven, BI/DW Developer. Together with Vickie Hemmen, Business Intelligence/Data Warehouse (Functional) & Reports Lead, they are delivering the BI/DW functionality to the State of Kansas.

> Kansas has a huge advantage over other clients I have worked with.
>
> SARA DEHAVEN

Members of the BI/DW Team consider various test reload scenarios in a recent meeting.

Kapp came to the Sunflower Project from the Kansas Department of Revenue, where he was the Accounts Receivable and Business Intelligence Manager. "I managed analytics and reporting for the State's Tax Accounts Receivables," he says. "Part of my job there was developing and then maintaining custom data warehouses that provide the State's tax collection services with analytical and reporting services. The work on this project was a natural fit for me. I really enjoy the challenges this work provides. I liked providing Revenue, and now the State, with tools that help improve information and efficiency."

Hemmen joined the project from the Department of Administration's Division of Accounts & Reports (A&R). Before that, she worked for the Kansas Division of Emergency Management, part of the Adjutant General's Department. "In A&R I as an accountant with the Setoff Program, which allows the Director of A&R to offset money the State of Kansas owed debtors against money they owe the State," she says. "On the project, I help with the functional side of BI/DW-related tasks and reports. This includes reviewing and tracking functional designs and resolving reporting gaps identified from the Agency Reporting Strategy. I also help facilitate activities for the Data Warehouse Advisory Group."

The Accenture team members bring familiarity with large-scale government data warehouse systems to the project. "I spent a year working for New York City's Department of Cultural Affairs," says Pond. "I managed the technical architecture, integration, and web development teams. We were helping them build their grants management system that provides $1 billion in grants across cultural projects in the City. Before that, I worked with New York City for over five years helping build their 3-1-1 Citizen Service Center which currently fields approximately 40,000 non-emergency service calls daily for everything from pothole complaints to reports of standing water for preventing West Nile Virus."

Steele most recently worked as an Enterprise Performance Management/ Business Intelligence Senior Consultant. "I worked with a great team," she says. Steele brings a wealth of experience to the project in PeopleSoft Financial applications specific to EPM Data Warehouse as well as Planning and Budgeting functions from her previous projects with other organizations.

"In my last project at Johnson Diversey, I was responsible for leading an implementation effort to load the Human Capital Management Warehouse with Workforce Analytics and Recruitment and Tracking data," says Gadde. "The work there was challenging, and the client is very happy with the product and the value their Data Warehouse is bringing to their business."

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AGENCY CHANGE AGENTS

The Sunflower Project website lists the Change Agents for each agency. Find it by pointing your browser to: http://da.ks.gov/smart/

UPCOMING DATES:

Things that will happen soon

- February 17: Change Agent Network Meeting #9
- February 25: Monthly Conversion Meeting
- March 9: Monthly Interface Meeting
- March 17: Change Agent Network Meeting #10
- March 24: Monthly Conversion Meeting
- April 1: Help Desk Kick-off Meeting
- April 14: Change Agent Network Meeting #11

PILOTING NEW TIME & LABOR FUNCTIONALITY DRAWS NEAR

New Time & Labor module in SHARP will integrate with SMART Projects and Grants

When the Time and Labor (TL) functionality was announced nearly a year ago (see the April 2009 article), twelve agencies volunteered to pilot the program for the State of Kansas. The system will share information between the Statewide Management, Accounting and Reporting Tool's (SMART) Projects and Grants modules and the new Time & Labor module in the Statewide Human Resource and Payroll System (SHARP). Agencies will use the TL functionality to collect labor expenditure information and distribute those costs among projects and grants.

Agencies piloting TL are the Kansas Corporation Commission, Citizens' Utility Ratepayer Board, Kansas Bureau of Investigation, Kansas Highway Patrol, Kansas Health Policy Authority, the Adjutant General, and the Departments of Aging, Wildlife & Parks, Commerce, Health & Environment, Labor, and Aging.

"PeopleSoft's TL will let agencies take advantage of the integration between TL and Project Costing," says Brent Smith, State of Kansas Time and Labor Lead. "This will allow both hours and dollars to flow to Project Costing. It also introduces 'Self Service,' which state agencies have wanted for many years."

"So far, we've completed the design and build phases. We're currently in the middle of testing," Jenny Duis, Accenture Time and Labor Lead says. Smith adds "We've completed two system test cycles. We will go through additional cycles through April." The TL functionality will go live in late June, to coincide with the first pay period of Fiscal Year 2011.

Duis and Smith quickly point out the extra work agencies involved have undertaken to be part of this pilot. "All our agencies have worked very hard at completing the TL tasks," says Smith. "They continue to revise, update, and send data to the project to use for testing. In turn, that helps agencies know they are on the right track.

"One unique challenge the TL agencies have faced is that their combocodes must have Project IDs imbedded," says Smith. "The State has been using combocodes since we went live with PeopleSoft in 1995. The requirement for TL agencies that the Project ID (and Department ID for both TL and Time and Leave agencies) be included, substantially increased the number of combocodes they've had to create. We have the ability to load the combocodes from agency spreadsheets, which reduces the opportunity for any system keying errors. Agencies have been successful in the creation of the combo codes and maintaining them on their spreadsheets, even though the work and number of codes have increased. The agencies are doing a fine job with this task."

> Kansas's agencies are diligent in completing their tasks, and we've found them eager to make updates as needed.
>
> JENNY DUIS

Duis agrees with Smith's assessment on that note. "Kansas's agencies are diligent in completing their tasks, and we've found them to be eager to make updates as needed. Our team has really enjoyed working with agency personnel and discussing issues with them. We really want to help them be successful with this implementation."

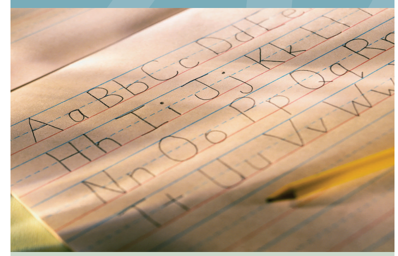
Most recently, the project's Interface Team has been accepting TL interfaces and loading data into the interface environment. "Our team is testing right now, and continuing to assist agencies," says Smith. "Soon, we will offer User Acceptance Testing, where a small group of agency TL users will come to our lab and enter data into the system to verify functionality. This will help them feel more comfortable with TL when we go live."

TASK #77

End-User WorkStation Software Requirements for SMART are available on the SMART website. The URL is: http://www.da.ks.gov/smart/documents/Workstation_Requirements.doc

GLOSSARY:

This section features acronyms or specific terms you should know. Here are some, in addition to those listed here last time. Watch here for more next time!



- Budget Calendars: Used to define the budget period (e.g., monthly, quarterly, annual)
- Check: The PeopleSoft term for a negotiable instrument drawn against deposited funds; the State has historically called this a "warrant"
- Expense Budget: A structure of budget, such as appropriation, that records Budget, Expense, and Encumbrance. It may include Pre-encumbrance transactions.
- Hold: A status which prevents SMART from issuing a check for a voucher during the Pay Cycle
- Revenue Budget: A structure of budget that records estimated, recognized, and collected revenue
- Stop: An instruction not to pay a check that has been issued, usually due to the loss or theft of the check
- Void: Cancellation of a check that has been issued but not yet distributed to a party. The check may or may not be reissued

AGENCY READINESS TEAM GEARS UP FOR GO-LIVE

Team plans activities until go live

Since the Sunflower Project kickoff in October 2008, the Agency Readiness Team has been working closely with agencies, helping them prepare to be successful when the Statewide Management, Accounting and Reporting Tool (SMART) goes live on July 1 this year. After planning and conducting Change Agent Network meetings, Business Process Workshops, individual agency meetings, and Role Mapping Workshops the team has no intention of slowing down now in their mission to help agencies be ready for SMART.

"We have essentially four roles," explains State of Kansas Agency Readiness Lead Jennifer Dennon. "First and foremost, we help agencies prepare for their transition to SMART. Second, we draw together and synthesize information from various sources and present it to agencies in an understandable, meaningful format. Third, we encourage a holistic approach to change management during this transition, incorporating discussion of technology, processes, and people. Finally, we facilitate agency issue identification and resolution."

Agency representatives learned about role mapping in January workshops.

Having conducted Role Mapping Workshops in January, the team is working closely with agencies on updating their role mapping assignments as necessary. Bryan Loudermilk, Accenture Agency Readiness Lead, says "We'll continue working with agencies on role mapping and other issues throughout the remainder of the project. We want to identify and resolve issues as early as possible so they don't impede agencies when we go live on July 1."

Loudermilk says Agency Readiness will give agencies a process in the coming months that will assist agencies to verify they are prepared for go-live. "Our focus will be on the critical 'to-dos' and moving them to 'have-dones.' This process won't introduce any new tasks. Instead, it will provide the agency a high-level snapshot of the work that should be completed, and in many cases already has been completed, before go-live." This process will complement cutover activities, and will be introduced to agencies at the March 17 Change Agent Network Meeting.

"We will outline specific goals agencies should meet. We'll discuss them with the agencies and implement a regular two-way communication process between our team and the agencies," Dennon adds. "Finally, we will review statewide progress on a weekly basis and collaborate with agencies to help them achieve the progress they need, or resolve issues they face. We want nothing more than agencies to be successful in transitioning to SMART. The processes and assistance we're providing over the next five months are designed to help them succeed."

The Agency Readiness Team will give agencies a process in coming months. The process will assist agencies in verifying they are prepared for go-live.

Help Desk Contacts Identified, *continued from page 4*

The first responsibility of the SMART Help Desk Contact will be to attend the help desk kick-off on April 1 (invitations will be distributed in March). They will receive an introduce and gain access to ServiceDesk, the SMART Help Desk Web-based Tool, at this meeting. They will also take part in post go-live agency stabilization sessions that will help insure their agency receives ongoing information and communication regarding SMART.

While all SMART end-users and Help Desk Contacts can request assistance from the SMART help desk via phone to report incidents, only the SMART Help Desk Contacts will receive a security login to ServiceDesk, allowing them to access the database of solutions, check system-wide announcements, review agency incident requests and log incidents. Mary Vanatta, Sunflower Project Help Desk Lead, states "Their security access will allow the help desk contacts to view only their agency's incidents and solutions."

In order to manage the security access to ServiceDesk, the agencies were also asked to appoint a Help Desk Liaison (and backup, if desired) as a single point of contact to request or change security access to ServiceDesk. The Help Desk Liaison may be the same person as the Help Desk Contact but with the additional responsibility of appointing and managing which SMART users within their agency are to be Help Desk Contacts. The SMART help desk will accept SMART Help Desk Contact assignments only from the agency's SMART Help Desk Liaison. This task was due back to the Sunflower Project by February 5, 2010.

Vanatta says "The Help Desk Contacts and Liaisons provide a very important piece of the overall support structure of SMART. It would be much harder to support the new financial system of this size without key agency subject matter experts and contacts."

KHP prepares for SMART, *continued from page 1*

"I also present SMART updates at the bi-monthly statewide Commanders' meetings and morning operational conference calls," she continues. The KHP follows a strict chain-of-command, so communication always includes top-level managers. These managers will have roles in several aspects of approvals when SMART goes live. And as our Accounting and Procurement Team Directors learn details about SMART, they discuss them at their team meetings."

Weller credits the KHP staff and managers for making the agency's preparations for SMART successful. "Their positive attitude and willingness to move our financial processes to a more technologically advanced system is probably the most effective part of our preparing for SMART. Our Fiscal managers have attended all the SMART meetings and sessions and completed nearly all of our activities so we can learn all we can about SMART. We anticipate hands-on training will have the greatest benefit to our preparation, since that will test our understanding of SMART and the way we expect to use it."

KHP's approach has been to provide its employees with information as the Sunflower Project finalizes decisions. "We have tried not to jump in too fast with specific information when statewide decisions are still in process," she says. "We try to avoid making statements that we may have to retract later, and end up retraining people. We've tried to reduce confusion and apprehension, and our staff has remained positive."

The KHP is continuing to prepare for SMART's July 1 go-live date—now just more than four months away. "Role mapping is encompassing much of our immediate activity," Weller points out. "We are surveying employees across the state to determine how to best match SMART's new processes with our existing organizational structure. At General Headquarters, work is beginning on amending forms, agency formal policies, and agency processes. All impacted agency staff are aware that SMART is forthcoming and we have asked them to reflect on current processes and specific changes that managers and administrative staff would like to implement along with the new system. Scheduling training will present a significant challenge since the KHP has seven regions across the State, as well as other specialty functions that operate outside of Topeka. Although the initial agency setup and more global vision and work to date have been created by Fiscal Managers and myself, everyone who will use SMART is involved at some level in making KHP's transition successful."

TIME & LABOR AN IMPORTANT COMPONENT

The KHP is one of the twelve pilot agencies for the Time & Labor (TL) Module. Weller outlines some of the additional coordination KHP has had to undertake to be part of that group. "The TL module, because of its intertwined functionality with SMART, SHARP, and IBARS has required significant thought and planning. The KHP has spent more time on this module than any other SMART activity to ensure an understanding of the impacts and inter-system functionality.

"The KHP's Fiscal and Human Resources departments have worked closely on the setup for TL. We held meetings with key staff that are working on various grants to ensure the capture of time is in correct time categories. We've also had specific meetings with Sunflower Project team members to be sure the coding structure will correctly accomplish the posting to SMART projects, as well as comply with the functionality required both by SHARP and IBARS. We're looking forward to some hands-on experience to determine if our setup works as we envisioned."

Weller says the potential benefits of the TL module were particularly attractive to the KHP. "Currently, the KHP has federal grants that require hourly timekeeping, mileage tracking, and capturing of work performed by positions funded from regular operating funds whose work is grant-related. We expect TL to automate and speed the time accumulation and reimbursement requests, which we currently do through paper documents and Excel spreadsheets. The KHP has not had an automated method to financially account for time and activity, before.

"By simplifying and speeding up our processes, we anticipate TL to eliminate much of the manual effort and allow managers access to information on a much timelier basis. We also plan to use TL in the future for other costing analyses and potentially help identify administrative functions for indirect cost allocation. As we learn more, we expect TL will eventually have many more applications that will provide improved accountability and management of our programs and functions."

SMART WILL ACCOMPLISH PROCESS IMPROVEMENTS

"KHP administrative employees statewide, as well as Fiscal Department employees, have offered many suggestions that would achieve many of the results we expect from SMART," says Weller. "This system will provide us a means for meeting those suggestions, including electronic workflow of purchase requisitions and travel, eliminating paper forms, and increasing efficiency in processing financials at all levels. Ultimately, we hope SMART will allow the KHP to better manage its financial resources, be more accountable, and help us make wise decisions and recommendations regarding agency operations without having to maintain so many spreadsheets and data outside the system."

When asked what advice she might have for other agencies, Weller stresses the importance of planning and attention to details. "We would encourage agencies to really think through the integration that must happen in a system such as SMART. They should ask a lot of questions to ensure that the agency and the Sunflower Project team have the same understanding. The Chartfield setup and other coding is hugely important in obtaining the necessary and expected results. Only the agencies truly know their own requirements and interactions between the different fiscal processes, including budget. That's why we are continuing to work on understanding the system's functionality module-to-module, as well as its interactions with SHARP and IBARS."

Training Rolls Out, *continued from page 1*

Stephen Britcher, Accenture Training Lead, explains that the pilot training currently under way has a dual purpose. “This is the final test of the instructor-led training we developed. Finance Team members are attending our pilot training sessions and providing content-oriented feedback. Training Team leads are also providing feedback on the presentation and areas where delivery can be improved. Pilot training is the next step of our TTT approach. Agency Trainers are attending the pilot training sessions for the courses they will teach, participating in each class activity, and taking notes and asking lots of questions.”

The final step in TTT is a set of teachback sessions, where agency trainers conduct a session of the courses they will train.

GINA VINYARD

After the pilot trainings conclude, the training team will make final training material updates. “The final step in TTT is a set of teachback sessions,” Vinyard says. “In teachbacks, the agency trainers work as a group to conduct a session of the courses they will train. This gives them an opportunity to practice before an audience, ask questions, make additional notes for themselves, and receive some feedback from peers on their presentation.”

The Train-the-Trainer Kickoff was the first step in a three-step approach to training SMART trainers. The second step is pilot training, and the final step will be a set of teachback sessions.

Agency SMART end-users should watch for ILT registration to open in March. The project will communicate specific details about end-user registration to the Agency Training Contact. Registration priority is given to those agencies that have completed their role mapping on time and have volunteered trainers and training facilities. End-users can find their training contacts in the “All Agency Contacts” document on the SMART website, http://da.ks.gov/smart/changeagentnetwork.html

Meet the BI/DW Team, *continued from page 5*

DeHaven says she is enjoying the close contact she has with the State on the Sunflower Project. “Having Kansas team members working on the project from start to finish gives the Sunflower Project a huge advantage over other clients that I have worked with,” she explains. “The transfer of knowledge is happening as we go along, not all at once at the end of the project or after go-live.” DeHaven has extensive experience with telecommunications industry clients where she has been involved with functional design, testing, and deployment of customized software programs.

The BI/DW Team discusses ways agencies can draw trends and analysis from SMART’s Data Warehouse.

Pond agrees with DeHaven’s assessment of Kansas as a client, and adds “The people are absolutely incredible to work with, and this work is extraordinarily meaningful. I am looking forward to meeting everyone at the finish line.”

Asked to elaborate on what he sees at the finish line, Pond says “The State is providing its agencies with a new capability to draw trends and analysis from the vast amounts of Human Resource data in SHARP and the growing data that SMART will capture. This new tool will give the State new insight into its spending and financial processes. Kansas will be able to capitalize on efficiencies it finds.”

Hemmen agrees. “The Data Warehouse will impact every agency in the State.”

“This project not only revolutionizes the way the State enters and tracks their financials,” concludes DeHaven, “it also provides a streamlined tool for accessing financial and human resource information into reports. Agencies will value the ability it provides to pull *ad hoc* requests on their data themselves, instead of having to request that information from a central group.”

FREQUENTLY ASKED QUESTIONS

The Frequently Asked Questions section occurs regularly. It features questions asked about SMART. If you have specific questions to recommend for this section, please e-mail them to: Sunflowerfms@da.ks.gov

Q: *Will SMART work with Windows 7?*

A: Windows 7 is not yet certified for PeopleTools, but according to Oracle testing is currently underway. Until Oracle certifies Windows 7, SMART users on the Windows 7 operating system may experience incidents that the support team is unable to resolve. Oracle has not provided a timeframe for when Windows 7 might be certified.

Q: *Will "power users" need to learn a specific computer language to run queries?*

A: The data warehouse provides end-users an interface that does not require a programming language. Power users need to understand how database table structures and data origins work. Power user training will contain what you need to know to write reports in the Data Warehouse.

Q: *My agency didn't have time to get our role mapping assignment done. May our employees register for training?*

A: No. The role mapping assignment is the key for identifying what training individual employees must take. The training, in turn, is the key for getting security access for the employees to conduct business in SMART.

Q: *If we are already a delegated audit agency, can we increase our authority from $2,000 to $5,000 prior to July 1, 2010?*

A: You may be able to. You should contact Randy Kennedy with the Division of Accounts & Reports to discuss increasing your agency's delegated audit authority. Randy can be reached at 785.296.2125 or via email at Randy.Kennedy@da.ks.gov.

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Statewide Management, Accounting and Reporting Tool

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High-Level Project Timeline and Agency-Related Activities

Plan & Analyze Oct '08—Dec '08	Design Jan '09—Apr '09	Build May '09—Oct '09	Test & Deploy Nov '09—Jun '10	Support Jul '10—On
• Host Project Kickoff • Launch Website • Identify Agency Contacts • Conduct Conference Room Pilots • Publish Project Charter • Complete Agency Skills Assessment • Launch Project Newsletter DONE!!	• Conduct Agency Introduction Meetings • Launch Change Agent Network • Conduct Budget Structure Workshops • Conduct Interface Workshops • Distribute Initial Agency Readiness Assessment • Design Agency Interface • Create Agency Conversion Strategy • Design Training Curriculum DONE!	• Conduct Change Agent Meetings • Conduct Configuration Workshops • Conduct Conversion Workshops • Conduct Interface Workshops • Conduct Business Process Workshops • Distribute Agency Readiness Assessments • Modify System • Adjust Agency Interfaces • Clean Up Data • Build Data Conversion Processes • Build Training Courses DONE!!	• Conduct Change Agent Meetings • Conduct Role Mapping Workshops • Pilot Training Curriculum • Conduct Train-the-Trainer Programs • Train End-Users • Distribute Agency Readiness Assessments • Plan Cutover • Test Agency Interfaces • Test and Load Data for Conversions • Reconcile Data • Establish Help Desk • Perform User Acceptance Testing • Validate System • Cutover to New System: July 1, 2010	• Support Production • Respond to Agency Feedback • Decommission Redundant Agency Systems