



# City of Tucson Upgrade Project

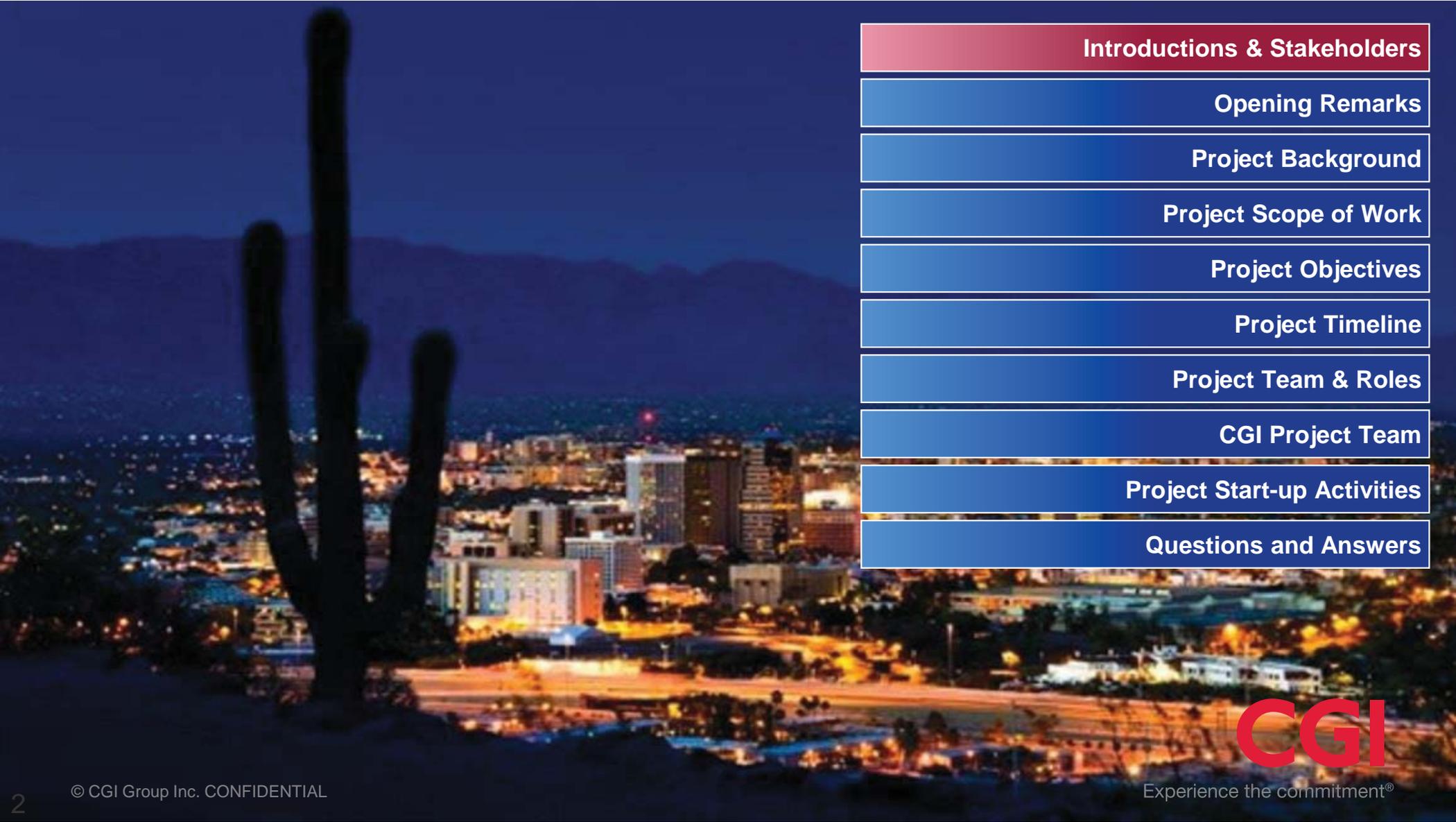
## Advantage 3.8.x Upgrade to 3.11.1

Date: August 22, 2017 v1

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- Introductions & Stakeholders**
- Opening Remarks
- Project Background
- Project Scope of Work
- Project Objectives
- Project Timeline
- Project Team & Roles
- CGI Project Team
- Project Start-up Activities
- Questions and Answers

# Introductions & Stakeholders

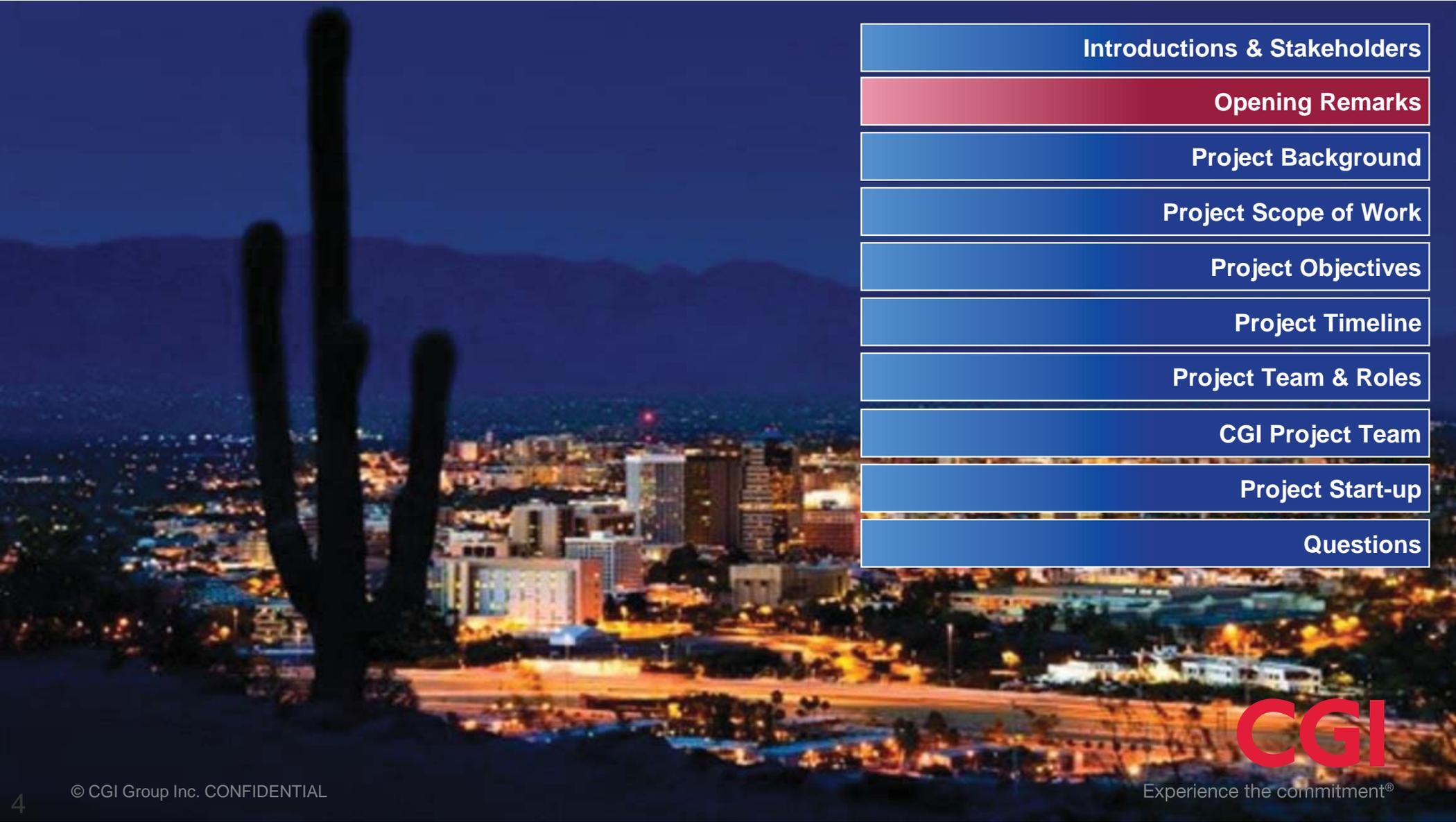
- City of Tucson

- Joyce Garland Assistant City Manager
- Dave Scheuch IT Director (CIO)
- Pete Saxton Finance Director (CFO)
- Ana Urquijo HR Director (CHRO)
- Marcheta Gillespie Procurement Director (CPO)
- Chuck Sakwa Project Director
- Jacque Hernandez Project Manager

- CGI

- Tim Lund VP, Interim Metro Lead
- Jeff Snyder Director, Engagement/Account Manager
- Doug Beam Director, Project Manager





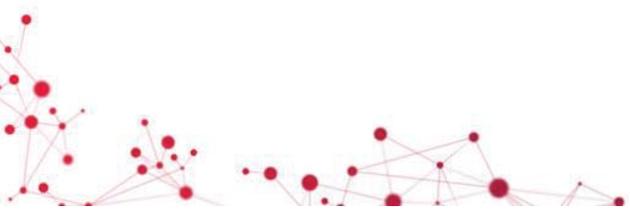
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## Opening Remarks

- City of Tucson
- City Directorates





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# Background

## History

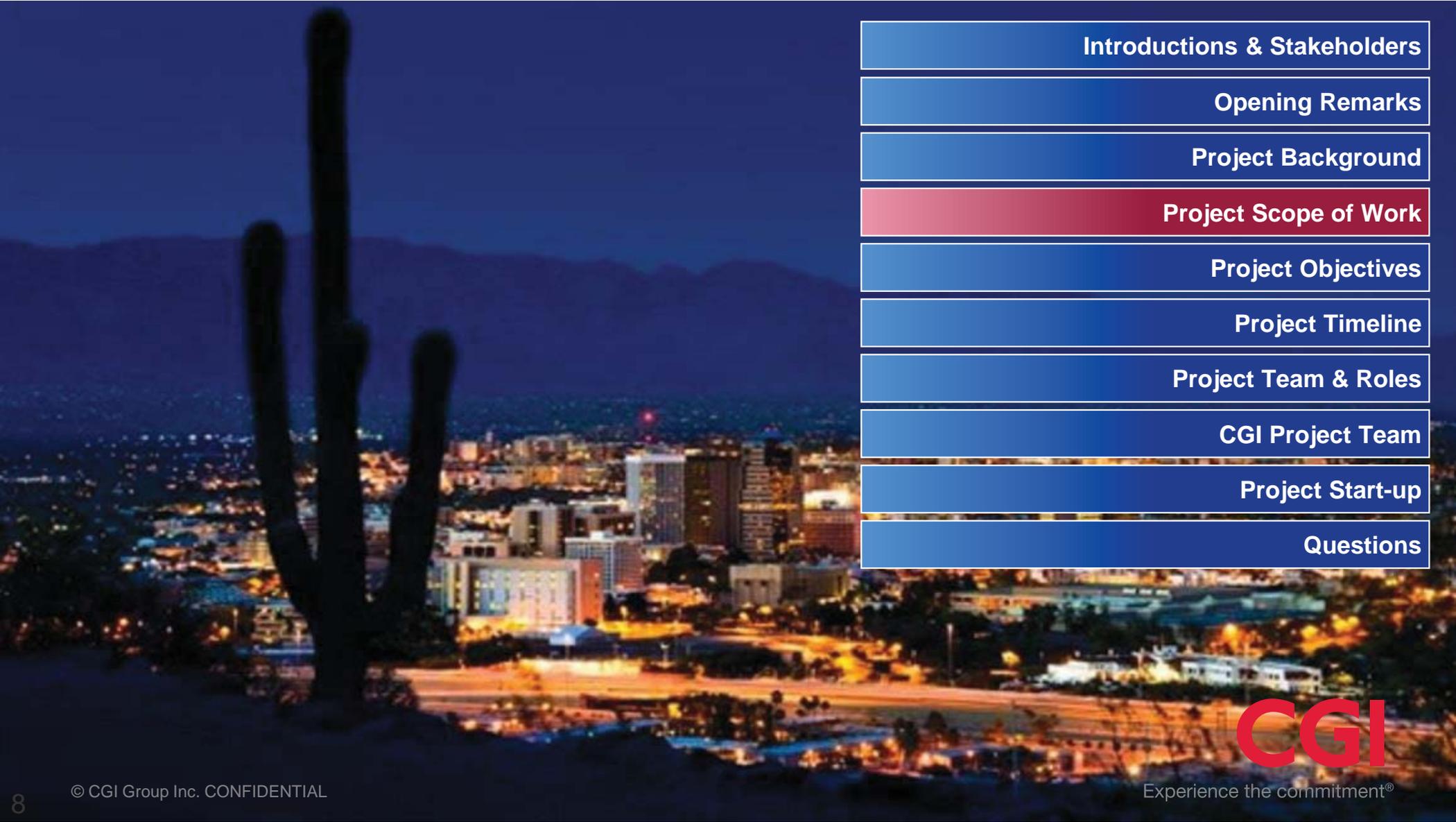
- 1991, City partnered with CGI to implement 2.x Advantage Enterprise Resource Planning (ERP) System
- 2003, City partnered with CGI to upgrade the City's Advantage Enterprise Resource Planning (ERP) System to 3.x
- 2012, City partnered with CGI to host & operate the City's 3.8 Advantage Enterprise Resource Planning (ERP) System
- City's ERP is hosted at the Phoenix Data Center (PDC)
- City's ERP is operated by Premium Services Managed Advantage Group (PSMAG)

## Components

- CGI Advantage Administration (ADM)
- CGI Advantage Financial Management (FIN)
- CGI Advantage Performance Budgeting (PB)
- CGI Advantage Human Resource Management (HRM)
- CGI infoAdvantage Reporting

## Today

- City elected CGI to perform a technical upgrade of their CGI Advantage ERP application from Release 3.8.02 to Release 3.11.1
- City decided to have CGI perform configuration of previously identified new functionality components defined as "Must Haves"



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# Scope of Work – Technical Areas

## Applications

CGI Advantage 3.8.2 to 3.11.1PRA

CGI Advantage Administration (ADM)

CGI Advantage Financial Management (FIN)

CGI Advantage Performance Budgeting (PB)

CGI Advantage Human Resource  
Management (HRM)

CGI infoAdvantage Reporting

## Environments

Five (5) 3.11.1PRA environments

One (1) PRD and one (1) NPD BIRT instance

One (1) PRD and one (1) NPD infoAdvantage  
instance

Shared Admin

NEW! WebSphere to JBOSS

NEW! Adobe to BIRT

## Scope of Work – Functional Areas

### CGI Advantage Financial Management (FIN)

Accounts Payable

Disbursement

Fixed Assets

System Wide Changes

Supported Browsers

### CGI Advantage Performance Budgeting (PB)

Budget Formulation

Chart of Accounts

General Improvements

Salary and Benefits Forecasting

Security Improvements

Utilities

## Scope of Work – Functional Areas

### CGI Advantage Human Resources Management (HRM)

Employee Self Service

General HRM improvements

Payroll Accounting Management

Personnel Management Enhancements

Position Control Enhancements

System-wide Changes

### CGI infoAdvantage Reporting

Accounts Payable Universe

Baseline Reports Enhancements

Budget Universe Enhancements

Chart of Accounts Enhancements

Fixed Asset Universe

infoAdvantage Framework

Procurement Solicitation Life Cycle

Universe and ETL Enhancements

Universe Usability Enhancement

## Scope of Work – Team Aligned Activities

### CGI

Technical Platform Upgrade

Code Merging

Lead Discovery Session Workshops

Functional Analysis

Shakedown & System Testing

Configuration of Must Have Enhancements

Configuration Deployment

Defect Fixes

Data (Mock) Conversion

Production Cutover

## Scope of Work – Team Aligned Activities

### City of Tucson

Functional Understanding

Participate in Discovery Session Workshops

Make Decisions Related to Must Haves

Organizational Change Management

Project Communication

End User Training

Forms

Reports

Interfaces

User Acceptance Testing Preparations & Execution



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## Project Objectives

- Deliver on-time and on-budget
- Meet defined milestone dates
- Own the project schedule and activities
- Team and Work collaboratively with City SMEs
- Discovery Session Workshops for “Must Have” enhancements to:
  - Confirm common understanding
  - Prioritize
  - Perform analysis of options
  - Document recommendations, and
  - Support City questions regarding domains responsibility which the City holds (e.g. reports, interfaces, forms, documentation)
- Configure “Must Have” enhancements to meet City requirements
- Identify Opportunities for Adoption of Best Practice Recommendations



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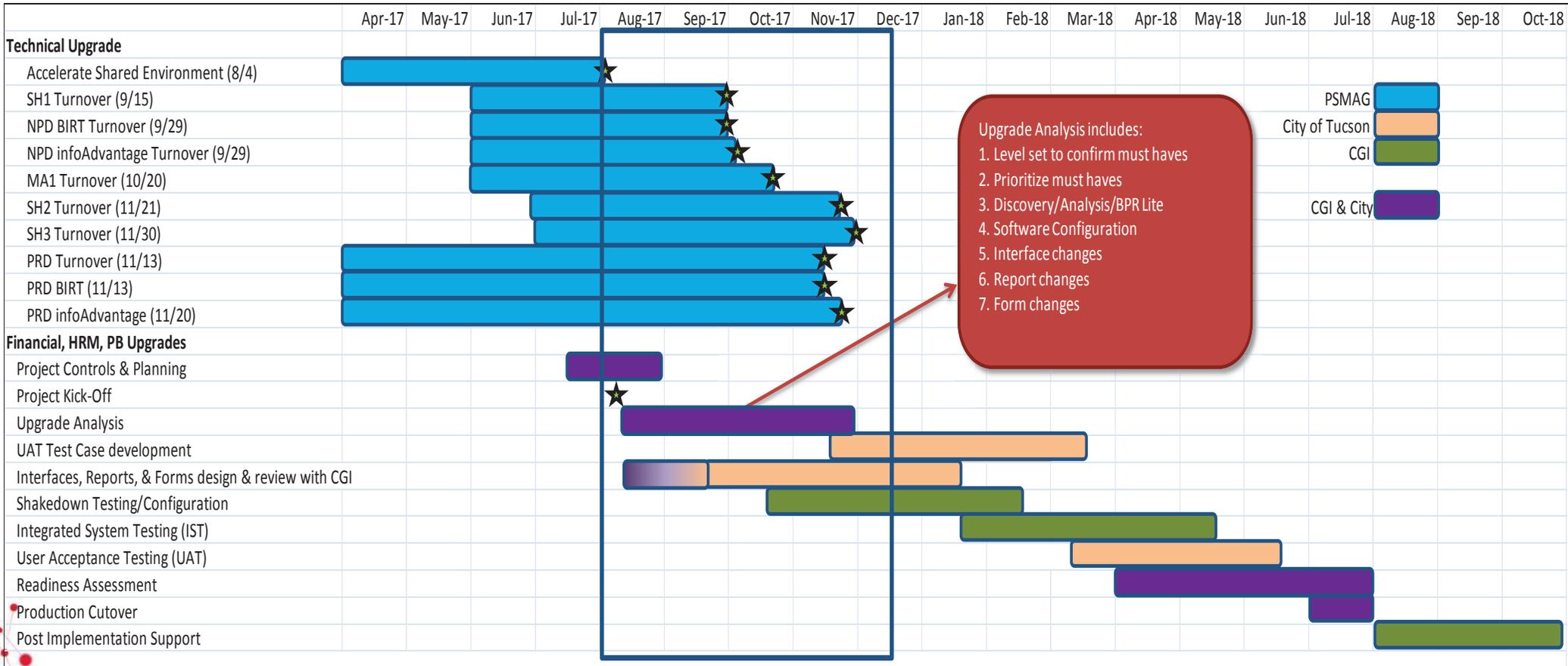
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## Project Timeline Highlights

- 12-month Implementation
- 3-month Post Implementation Support
- Project Start August 7, 2017
- User Acceptance Test *Preparations* November 2017 – February 2018
- User Acceptance Test *Execution* February 2018 – June 2018
- Go-Live Weekend of July 28, 2018



# Project Plan – High Level Timeline



## Milestone Dates

Milestone	Owner(s)	Date
<b>Project Activity Milestones</b>		
Project Controls (Status Reporting, Project & Executive Governance, Issues/Risks, Project Team & Status meetings)	CGI/City	8/7/2017
Project Kick-Off	CGI/City	8/8/2017
Upgrade Analysis (Start)	CGI / City	8/7/2017
Detailed Project Plan	CGI	9/15/2017
Upgrade Analysis	CGI/City	11/10/2017
Shakedown Testing & System Configuration (Start)	CGI	10/1/2017
Integrated System Testing (Start)	CGI	1/2/2018
User Acceptance Testing (Start)	City	3/5/2018
Readiness Assessment (Start)	CGI/City	3/5/2018
Production Cutover (Start)	CGI	6/1/2018
System Go-Live	CGI	8/1/2018



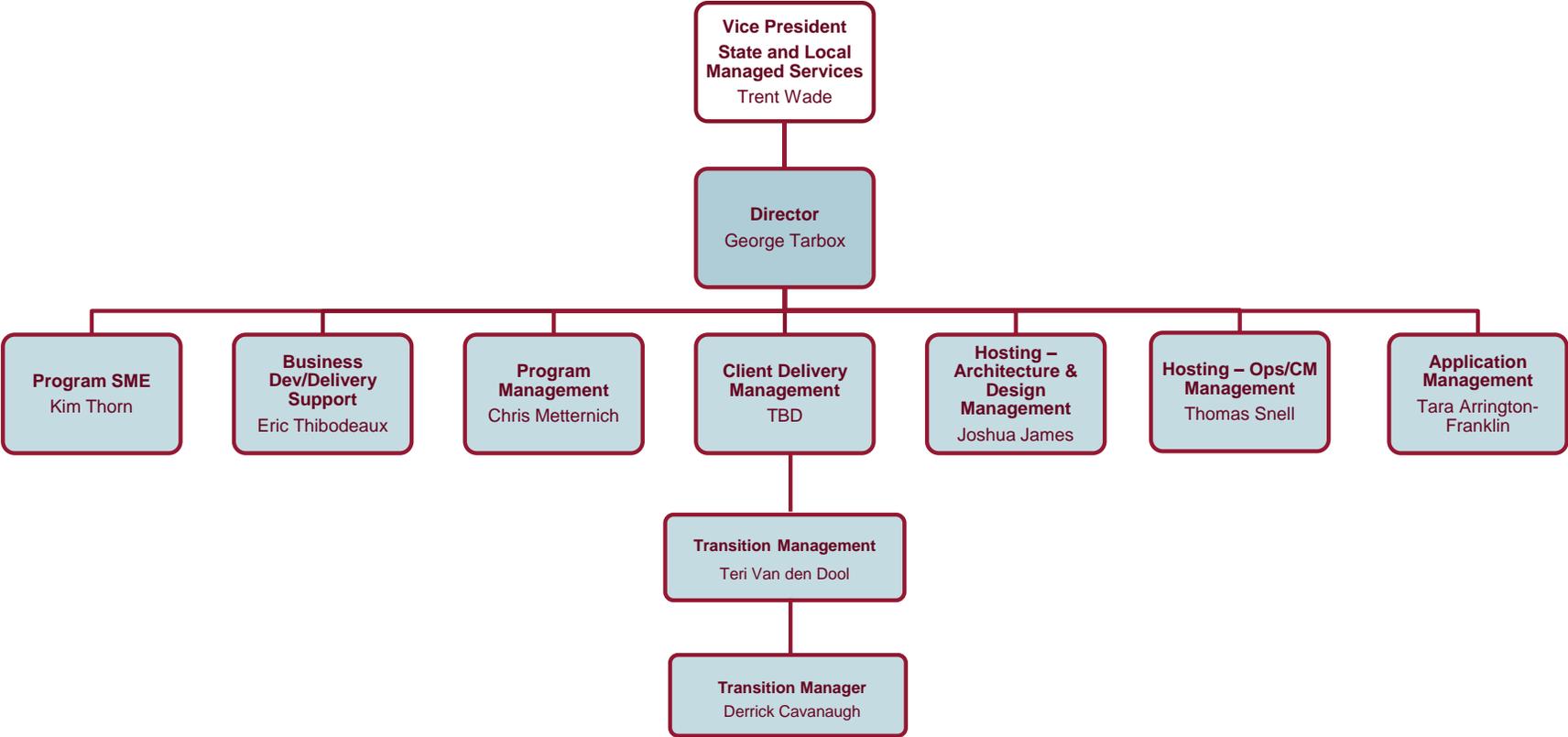


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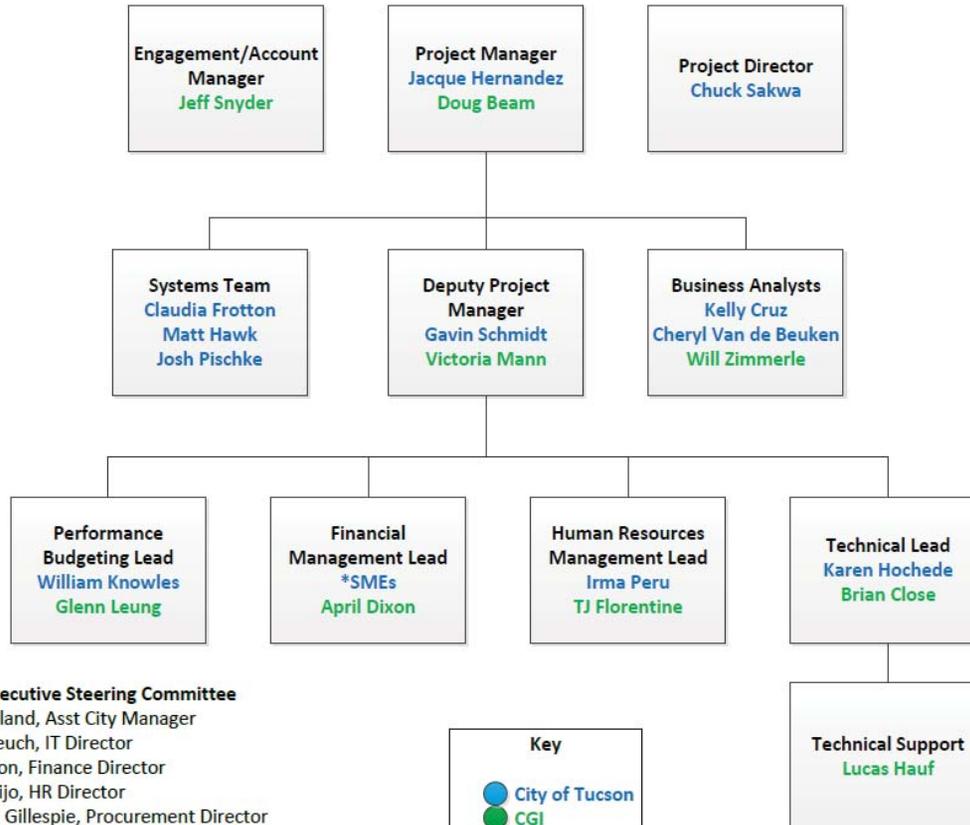
# PSMAG Team Structure & Roles



# Project Team Structure & Roles



## COT, CGI, Executive Steering Committee Advantage 3.8 – 3.11 Upgrade



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## Project Team Structure & Roles (continued)

Project Role	City	CGI
Project Director/Engagement Manager	Chuck Sakwa	Jeff Snyder
Project Manager	Jacque Hernandez	Doug Beam
Deputy Project Manager	Gavin Schmidt	Victoria Mann
Performance Budgeting Lead	Vivian Newsheller William Knowles	Glenn Leung
Financial Management Lead	Aaron Williams Silvia Navarro Penny Watts	April Dixon



## Project Team Structure & Roles (continued)

Project Role	City	CGI
Human Resources Management Lead	Irma Peru	TJ Florentine
Technical Lead	Karen Hochede	Brian Close
Business Analysts	Kelly Cruz Cheryl Van de Beuken	William Zimmerle
Systems Team/Technical Support	Claudia Frotton Matt Hawk Josh Pischke	Lucas Hauf





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## Jeff Snyder – Director, Engagement Manager



- 27 Years Helping Clients Solve Business Problems
- COBOL - BOXI
- Leisure Pursuits:
  - Family
  - Travel
  - Hiking

## Douglas Beam – Director, Project Manager



- Project Management Professional
- Master Certified Project Manager
- 27 Years Public Sector ERP experience
- 4 Years Advantage ERP experience
  - State of Arizona
  - Maricopa County
  - City of Mesa
  - Pima County
  - Nevada Department of Transportation
- Leisure Pursuits:
  - Touring on my motorcycle with friends
  - Treasure Hunting
  - Gold Prospecting

## Victoria Mann – Senior Consultant, Deputy Project Manager



- Project Management Professional
- 22 Years private/public sector Project Management
  - Bank of America
  - ADP
  - City of Fresno
  - CGI (BC Ministry of Energy and Mines)
- Leisure Pursuits:
  - Hiking
  - Canoeing
  - Travel, exploring the history of the Americas
  - Landscaping

## April Dixon – Senior Consultant, FIN Lead



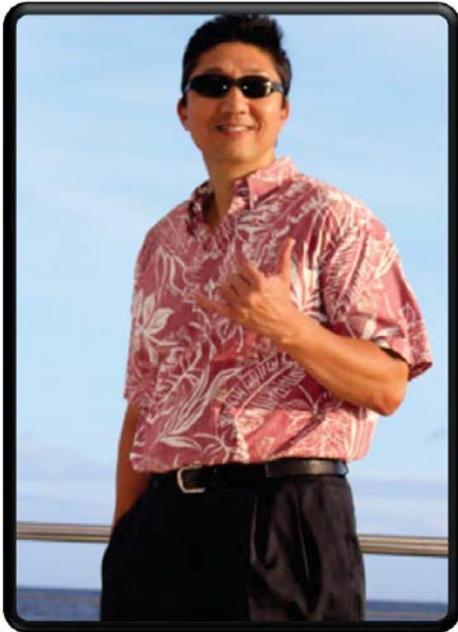
- Certified Accounts Payable Professional
- 11 Years Public Sector Advantage ERP experience including:
  - City of Tucson, Arizona
  - Ventura County, California
  - Orange County, California
  - State of Arizona
  - California Department of Transportation
  - City of Los Angeles, California
  - Southwest Florida Water Management District
  - New York City, NY
- Leisure Pursuits:
  - World Traveler – favorite city is Florence, Italy

## TJ Florentine – Senior Consultant, HRM Lead



- CGI Advantage HRM Subject Matter Expert
- 13 years public sector Advantage ERP experience including:
  - Idaho Transportation District
  - City and County of Honolulu
  - Fulton County, Georgia
  - City of Springfield, Illinois
  - Los Angeles County, California
  - State of Wyoming
  - Pima County, Arizona
  - City of Tucson, Arizona
  - State of Michigan
  - Genesee County, Michigan

## Glenn Leung – Senior Consultant, PB Lead



- 6 years ERP Advantage PB and BIRT experience:
  - LA County 3.9 Upgrade
  - City/County Honolulu 3.10 Upgrade
  - Pima County 3.10.0.1 Upgrade
  - State of Arizona 3.10.1 Transition to BIRT forms
- Other CGI experiences:
  - Hawaii Tax Implementations
  - Hawaii Disease Surveillance and Laboratory Management Implementations
  - Hawaii Affordable Healthcare Act Implementation
- Leisure Pursuits:
  - Vacationing Asia and National Parks
  - Weekend exercise and coffee in Waikiki beach

## Brian Close – Senior Consultant, Technical Lead



- CGI Advantage ERP Technical Subject Matter Expert
- 4 years Public Sector ERP Advantage Experience:
  - State of Arizona
  - Maricopa County, Arizona
  - Los Angeles County of Education, California
- University of Arizona – Go Wildcats!
- Leisure Pursuits:
  - Country Thunder / Concert Buff
  - Reading Non-Fiction and Fiction
  - Sports Devotee

## William Zimmerle – Consultant, Business Analyst



- California Lutheran University
  - Bachelors Degree in Geology
  - Assistant for the Geology Department at CLU
- Youth Director at St. Paul Lutheran Church
- Area Supervisor for the Peoria Sports Complex.
- Started as a Summer Intern for CGI
- Leisure Pursuits:
  - Avid outdoors adventurer

## Lucas Hauf – Consultant, Technical Support



- University of Phoenix Graduate
  - Bachelors Degree in Information Technology
- Started as a Summer Intern for CGI
- Leisure Pursuits:
  - Sketch artist and Painter

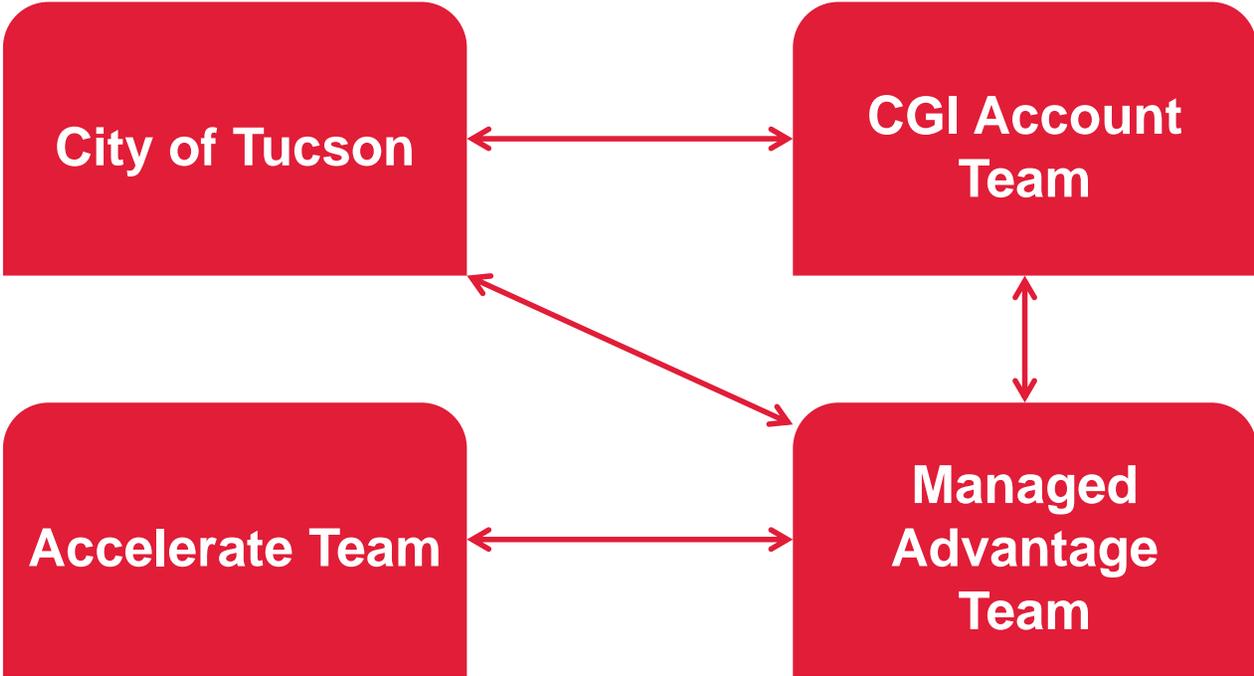


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# Local and Remote Support

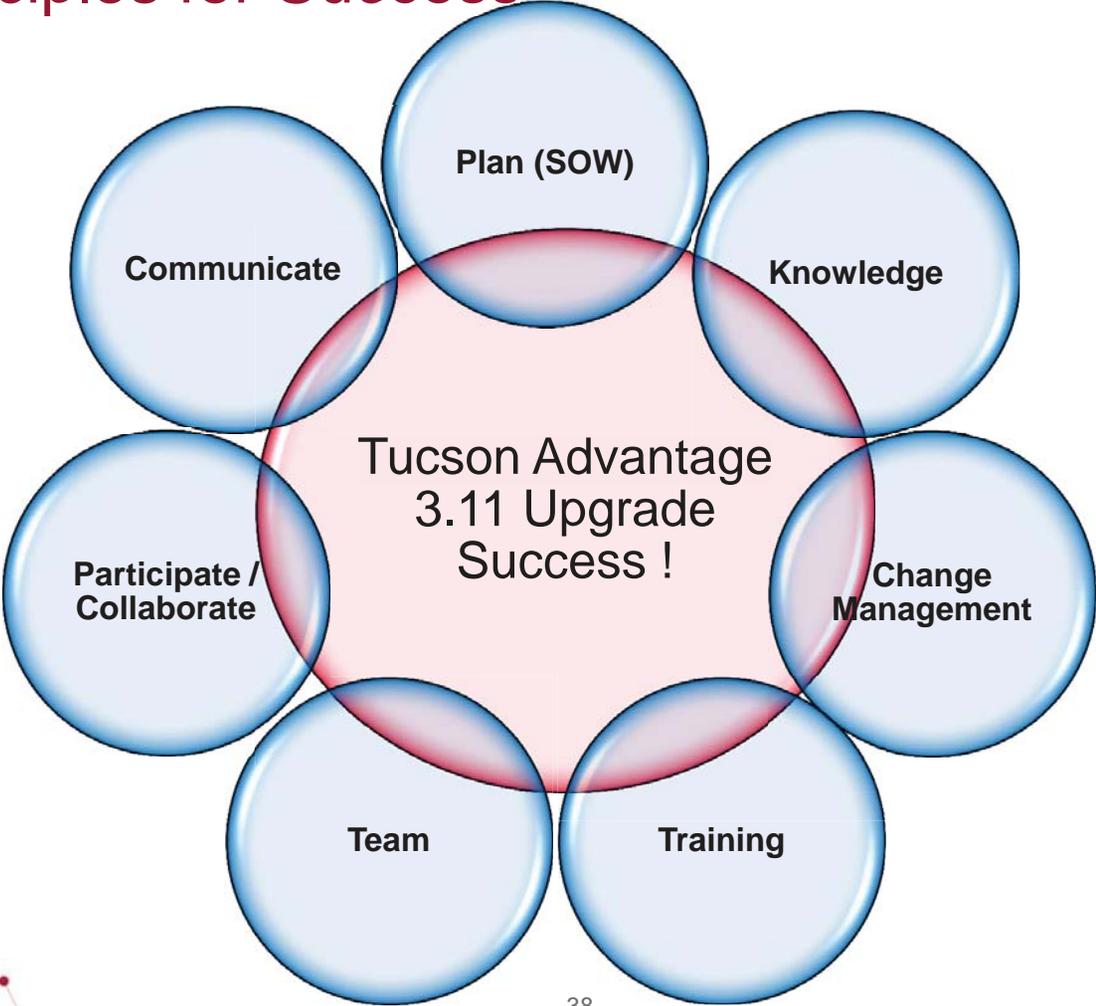


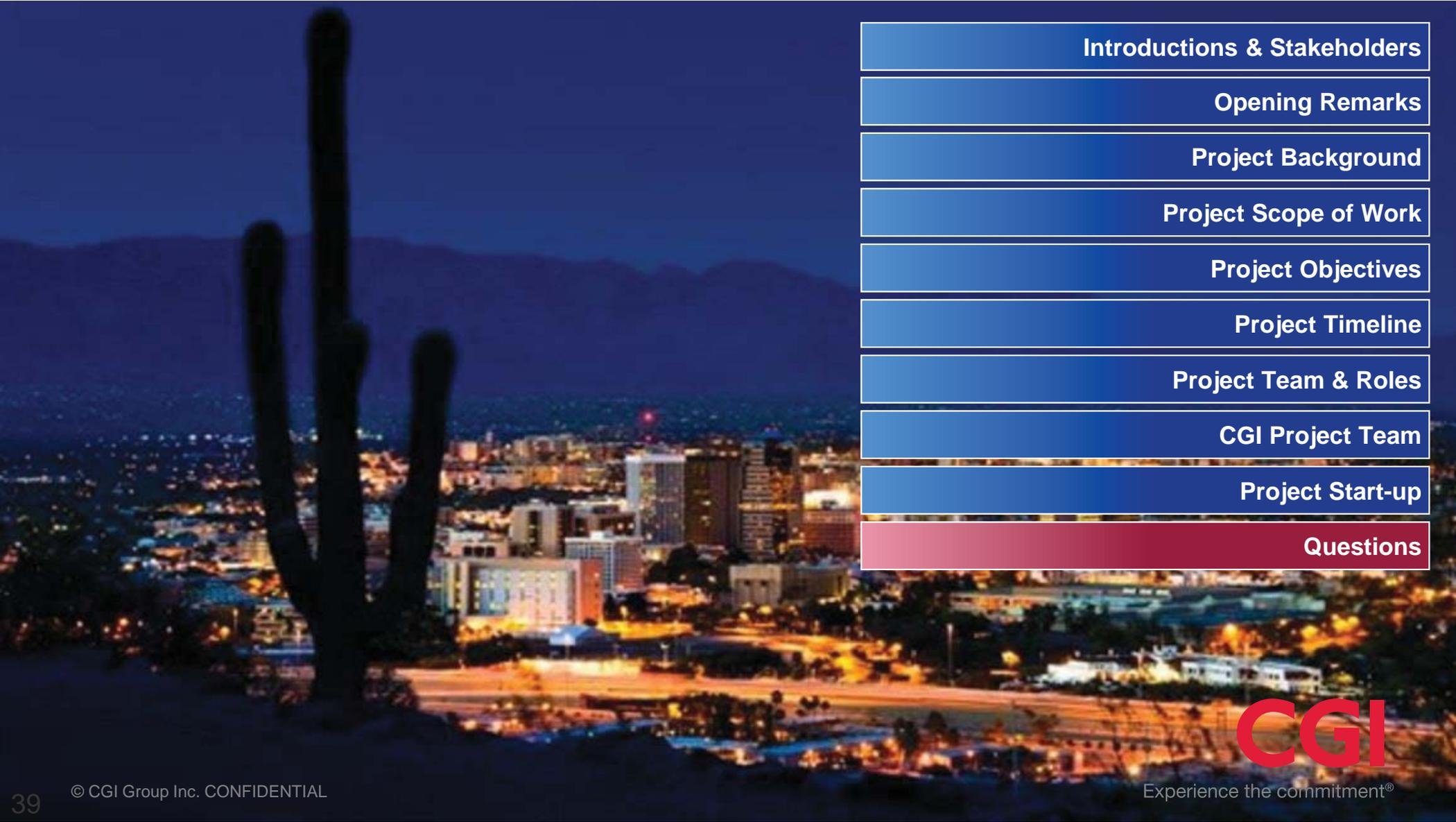
# Project Start-Up

- **Detailed Work Plan**
  - Detailed Work Plan must be completed within 30-45 days from the project start
- **Project Management Plans**
  - Plans have been started; need to be socialized with the City
- **Project Team Onsite Schedule**
  - Local team staggered 3 weeks onsite/1 week remote; 2 weeks onsite/2 weeks remote
  - Phoenix team onsite most days
- **Discovery Sessions**
  - Schedule sessions with SMEs



# Guiding Principles for Success





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