insights

Your window into the VISION Upgrade to v9.2 Project

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VISION Upgrade to v9.2

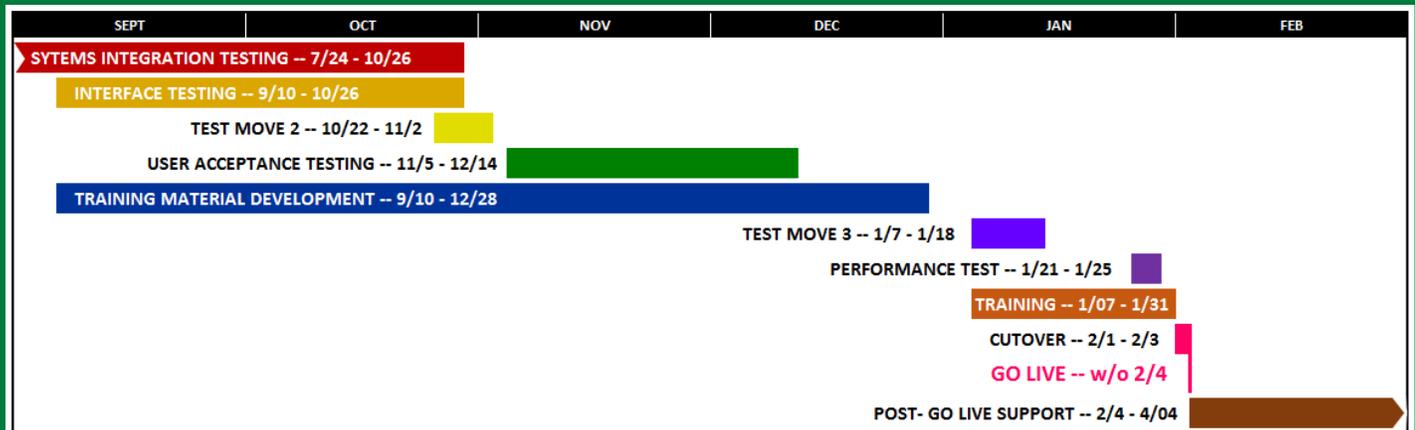*Intelligence is the ability to adapt to change.*

—Stephen Hawking

Due to the need for more time to ensure that version 9.2 is fully ready to support the State's financial operations, the VISION Upgrade to v9.2 project go-live date will move from the original target of mid-November 2018 to the week of February 4, 2019.

The project team along with our project sponsors remain committed to implementing the best possible system on day one. To do this, we believe that it's critical that full system testing and the process to resolve issues identified during testing are given the time they need to be completed successfully. As the project plan evolved we were not confident this could be accomplished resulting in the decision to delay go-live.

Revised Project Timeline

	SEPT	OCT	NOV	DEC	JAN	FEB
SYTEMS INTEGRATION TESTING -- 7/24 - 10/26						
INTERFACE TESTING -- 9/10 - 10/26						
TEST MOVE 2 -- 10/22 - 11/2						
USER ACCEPTANCE TESTING -- 11/5 - 12/14						
TRAINING MATERIAL DEVELOPMENT -- 9/10 - 12/28						
TEST MOVE 3 -- 1/7 - 1/18						
PERFORMANCE TEST -- 1/21 - 1/25						
TRAINING -- 1/07 - 1/31						
CUTOVER -- 2/1 - 2/3						
GO LIVE -- w/o 2/4						
POST- GO LIVE SUPPORT -- 2/4 - 4/04						

http://finance.vermont.gov/vision-v9.2-project-home

VISION.Upgrade@vermont.gov

Until the impacts of the shift to a go live the week of February 4th are fully worked out the project has moved to an "at-risk" status:

IN SCOPE **ON SCHEDULE** **WITHIN BUDGET**

Overall, the project remains on track to deliver on most of its objectives:

Project Objectives/Success Criteria

OBJECTIVE	SUCCESS CRITERIA	CURRENT STANDING
Replace Oracle PeopleSoft financials version 8.2 with the fully-supported version 9.2.	The upgrade is successfully implemented, and software is vendor supported.	The State's financial operating system will be upgraded to PeopleSoft v9.2.
Meet and/or exceed all GASB financial reporting requirements.	Receive the annual GFOA Certificate of Excellence in Financial Reporting in 2019 and forward.	VISION 9.2 will be compliant with all GASB requirements.
Complete the documented requirements.	Testing results confirm requirements have been met prior to implementation.	We are adding extra time for the testing and issue resolution process to ensure that we deliver on this objective.
Minimize operational disruption.	The current VISION operating system remains viable during the project.	The current system has been supporting the State's financial operating needs through-out the project.
Build a solid financial systems foundation for the State.	Reduce existing modifica-tions by using delivered 9.2 functionality with full design and technical documentation.	The upgrade to v9.2 project will implement a significant amount of new delivered functionality and provide improved internal controls over transaction approval.
Manage the project to ensure that key milestones and planned project budget are met.	All project milestones are achieved and the upgrade to v9.2 goes live on schedule and within budget.	The original targeted go-live date of mid-November 2018 will not be met. Any potential budget impacts have not been determined yet.

Check the VISION Upgrade to v9.2 project web site for more information as we get closer to go live or send us an email if you have questions.

Training Plan

As the project team finalizes the training plan for the VISION Upgrade to v9.2 Project we have identified over 500 changes that need to be communicated to VISION users. They range from major changes such as the introduction of WorkCenters (see the March issue of *Insights*) to simple changes that may just require an update to the existing VISION manuals.

Our Sierra-Cedar partners reviewed each VISION module for changes between the old version (8.8) and the new (9.2) and then rated each change on a 1 to 3 scale for complexity and impact. Most changes received a 1, these only require an update to the State's current VISION manuals and other documentation. These are changes such as having a pre-filled data block where users used to have to enter data. Changes that rated a 2 will be covered in live and/or recorded webinars. Live webinars will allow us to reach large numbers of VISION users in a short period of time while still allowing the opportunity for questions. Recorded webinars will let you view training when you're available and when you need them. All the end-user expense module videos currently available on the Financial Operations website will be re-created using recorded webinars. Changes rated 3 will require live, in-class training and will only be in cases where there is completely new functionality or very complex changes to existing functionality.

Once the plan is finalized the training team will update all of our existing documentation with revised instructions and all-new screenshots. Live webinars and any classroom training sessions will be scheduled and managed through the State's SOV LINC learning management system. Recorded webinars will be produced and made available on the web.

In addition to the formal training plan we are planning on holding open lab sessions before go-live where you can bring your own work and try out the new system in a sandbox environment. You'll be able to see how it works and ask questions about your specific concerns.

The work needed to be done to update all the State's VISION manuals and provide training for new and upgraded functionality will be challenging but we have committed the resources necessary to have all training in place by go-live.

Message from the Sponsors

After consulting with the VISION Upgrade to v9.2 project team, we have accepted their recommendation to move the go live date from mid-November to the week of February 4th. We are confident that this is the right decision for several reasons.

One of the commitments we made to you from the start of VISION upgrade project is to implement a fully-functioning system from day one. It has become clear both to us and the project team, that there is no longer enough time in the schedule to ensure that the system is fully tested and to make any necessary changes found during testing. The timeline was aggressive from the start and as the project moved along it became clear too many compromises would have to be made to meet the original go live date.

Continuing with the original project schedule would have also affected the training efforts. Even though we are upgrading a system that the State has used for years and not implementing a completely new system, there is significant new functionality and many smaller changes that need to be communicated to end-users. We want to make sure that you have the information you need to navigate these changes at go live; extending the go live date to the start of February will allow the project's change management team to do this.

Last, the project always had a "blackout" window for go live from mid-December to the end of January to allow for year-end processing such as 1099s. This pushed the earliest possible date for go live to the start of February. This blackout only applies to the go live process itself and project work will go on throughout the period.

The project team has put in a tremendous amount of work on this project while still supporting the day-to-day financial operations of the State. We look forward to seeing the results of their efforts during the first week of February.

– Adam Greshin, Commissioner - Department of Finance and Management
– Brad Ferland, Deputy Secretary - Agency of Administration