



Project
InForAll

NEWSLETTER



JAN 7, 2020



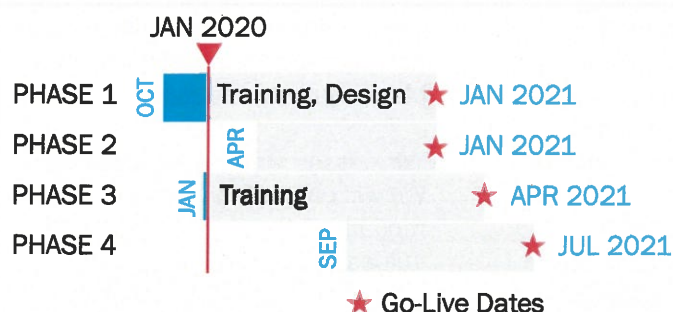
PROJECT INFORALL OCT 30th KICKOFF

LEFT: Executive Panel

TOP: Over 60 staff from Finance, HR, IT & Admin attended the kickoff event

Our Project Team has been busy since Project InForAll kicked off! We've put key project infrastructure in place, including our project website, planning documents (e.g., project charter, project plan, etc.), Infor consulting team, project team collaboration space, and key meetings. Phase 1 also started and teams in Finance, Purchasing & Contracts, Warehouse, and IT have completed 20 trainings since November! That's about half way through the overall project team training. Our Steering Committee has been working to clarify what is in scope; for example, if we should bill lease rentals and retirees benefit payments out of Infor or continue with the existing MuniBilling system. Three backfill staff in Accounting, Warehouse, and Recruiting have been hired to support their areas; additional recruitments are in progress. Finally, we've provided initial requirements documents to support the upcoming design workshops.

WHERE ARE WE?



LOOK AHEAD



Training in action: Guy Canha, Lidya Tesfaye, Jimmy Salandanan, Anne Cooper, Charlene Sun, Veronica Martinez, Gloria Del Rosario, Linda Yang, and Gloria Chou with Financial Consultant John Bell

As project team training tapers off for Phase 1, we will leverage the knowledge learned to collaborate with the Infor consulting team to design our new system. Within it, we will look at the new processes end-to-end to determine what we can adopt out-of-the-box (as part of industry best practices), what we can adopt with modest configuration, and what requires specialized attention to meet our unique needs. The design process will culminate in a prototype (Conference Room Pilot or CRP) for us to test and more deeply understand the gaps and adjustments required. Another prototype will be developed for a second CRP and additional detailed testing before the system gets built.■

PHASE 1: Financials (incl. Grants) and Supply Chain (Purchasing, Contracts, Warehouse)
PHASE 2: Expense Management

PHASE 3: Core HR (incl. Benefits, Safety), Payroll, Recruiting
PHASE 4: Extended HR (Training, Performance, Compensation Management)

NOTED JAN 14 2020

SCHEDULED JANUARY & FEBRUARY TRAININGS

Phase 1: Finance and Supply Chain

- Project Accounting
- Grant Accounting
- Billing & Receivables

Phase 3: HR, Payroll, Recruiting

- HR Foundations
- Global HR
- Payroll
- Benefits
- Workforce Mgmt

Cross-Phase: Technology

- Landmark Security
- Infor Operating System
- MHC document management
- Config Console
- MS Add-Ins (Payroll)

JANUARY DESIGN WORK- SHOPS

Phase 1: Finance and Supply Chain

- Purchasing
- Contracts
- Sourcing
- Supply Chain

MOVE TO SANTA TERESA

Phase 1: Finance and Supply Chain Early January

Phase 3: HR, Payroll, Recruiting Late February

"I'm getting a lot out of the training. I can see how everything works and can help us utilize the system."
- Kimberly Grundy

"I'm grateful our internal customers are being patient with us as we go through training."
- Christine Hernandez

"We need a key or glossary to help translate terminologies between Infor and PeopleSoft."
- Ingrid Bella



SUGGESTIONS, QUESTIONS?

Let us know at:
InForAll@valleywater.org or
aqua.gov/InForAll

ADVICE FROM A FEW PEOPLESOFT VETERANS

Who helped implement PeopleSoft 15 years ago

Put the system together from an end-user perspective



DANNETTE LEWIS
Purchasing

Really test the system; run it end-to-end



CHRISTINE HERNANDEZ
Accounts Payable

Have training materials in place and use it as part of testing

Change our internal processes to work with the new system



MEENA VANDRA
Benefits

Where possible, involve staff from beginning to end for continuity



How will Project InForAll be balanced with the work already going on in my unit?

Project InForAll is not a small undertaking and requires the contribution of many units at Valley Water to be successful. A combination of full-time staff, limited-term staff and consulting resources have all been brought on to support our project. If you have specific questions regarding your unit, please speak with your manager.

What PeopleSoft history will we be migrating to Infor?

To strike a balance in the effort, time, cost, and value associated with migrating data into the new

Infor system, we determined that in general, moving up to 18 months of HR data and 12 months of Financial data made the most business sense. We will ensure all PeopleSoft legacy data are archived and available for reporting.

Will the system truly be able to handle a full RFP process?

Yes! The system is capable of supporting our complete Purchase Requisition to Purchase Order process including the RFP process.

Will we implement a vanilla version or customize software to accommodate our processes and procedures?

The Infor applications will be configured (not customized) to meet Valley Water business requirements.

The system's flexibility and robustness will enable us to modernize our processes and adopt industry best practices while meeting our unique needs.

Will there be an interface to MuniBilling?

As continuity in business operation is critical, our IT team will ensure that existing interfaces, such as those to MuniBilling are developed.

What is our training methodology?

We will employ a variety of training modalities (e.g., online training, guides, drop-in trainings, and train-the-trainer, etc.) based on staff's needs and the content covered. A detailed training plan will be developed during the Build/Construction period.