Dear Liaison,

Welcome to the 21st Century (TFC) Project. Your role on the TFC Project has been identified on the Organizational Change Management (OCM) workstream, specifically the Deployment Team.

The State Controller’s Office (SCO) partnered with SAP to implement a payroll solution, called MyCalPAYS, for all state employees. The SCO has selected <organization-name> to provide expert, experienced liaisons to assist with the deployment of MyCalPAYS to all state departments. The system will be deployed to over 160 departments representing approximately 250,000 employees. Our goal as a team is to facilitate departmental preparation and readiness for the implementation of MyCalPAYS. As a liaison, you will work with one or more departments in conducting and assessing organizational change readiness activities, oversee the use of departmental readiness tools, and monitor departmental readiness for each Go-Live wave of the TFC Project.

The Deployment Team has created this “Welcome Kit” to provide you with some general background about the TFC project, your role as a liaison, and pointers to where you can find project related tools and information.

Also included in this binder are copies of the Department Support Teams’ (DSTs) documents that they receive to assist them in the various deployment readiness activities.

Please contact me if you have any questions, suggestions, or require assistance. I look forward to a very successful deployment and I am pleased to welcome you to the Deployment Team.

Thank you

Kathy A. James

Deployment Lead
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1. Purpose of Liaisons

The purpose of liaisons is to provide the State Controller’s Office (SCO) with staffing to assist the SCO in the deployment of a new statewide Human Resources payroll and management system, MyCalPAYS. The Deployment Liaisons will monitor and assist the 160+ departments that will be transitioning to the MyCalPAYS system. Liaisons will validate and coordinate tasks across four primary areas - functional readiness, technical readiness, user readiness, and site readiness - during the statewide deployment of MyCalPAYS:

- Functional Readiness includes collection of data not available in legacy systems and the cleansing of data in legacy systems prior to the transformation and loading into MyCalPAYS. Also includes participation in various functional system testing activities;
- Technical Readiness includes changes required to the department’s information technology infrastructure, installation of software, interface development and conversion testing;
- User Readiness includes change management, communications, and training;
- Site Readiness includes system cutover and post deployment support.

1.1 Liaison Roles and Responsibilities

Senior Deployment Liaisons

In addition to the tasks listed above, three (3) Liaisons will function as Senior/Lead Liaisons providing direction, expertise, guidance, and coordination of the work of the other Liaisons.

Deployment Liaisons

Liaisons facilitate departmental preparation and readiness for the implementation of the statewide MyCalPAYS system by the SCO. Liaisons work with one or more departments in conducting and assessing organizational change readiness activities. They will oversee the use of departmental readiness tools, monitor departmental readiness for the Go-Live phase of each wave of the TFC Project, assist project staff and departments in readiness activities and cutover tasks, and report on departmental readiness for Cut-Over/implementation.

The task assignments for each Liaison are determined by the Deployment Manager and OCM Manager. Task assignments, including start and end dates, are included in project-level and workstream-level work plans and schedules, and Liaisons are required to input their time against activities on a weekly basis using the Project’s automated time reporting tool, SharePoint. Work products to be developed and provided by the Liaisons will be determined by the Deployment Manager and OCM Manager, and will be clearly communicated to the Liaison. The format of the work product will be determined jointly by the Liaison and the State prior to development of the work product.
Tasks to be performed by the Liaisons include, but are not limited to:

- Communicating with departmental staff to determine the activities/actions the department must complete in order to implement MyCalPAYS at the date identified in the deployment schedule.
- Working with departmental staff to translate the design of MyCalPAYS into necessary changes to departmental automated systems, business processes and procedures; identifying necessary modifications and communicating them effectively.
- Working with departmental staff on various system testing efforts, including interface testing, conversion testing, and user acceptance testing.
- Assessing current and required information technology (e.g., desktops, network, security) in each department/location and recommending modifications.
- Assisting departments in mapping automated security roles to departmental roles, and working with departments and the TFC Project team in determining if additional automated security roles or changes to defined automated security roles are necessary.
- Assisting departments with enrollments for required TFC training and the use of automated training tools.
- Assisting with automated and manual departmental data collection and cleansing.
- Monitoring progress of detailed automated and manual cutover activities, including verification of converted data.
- Escalating concerns or issues on a timely basis so that department/location conversion to MyCalPAYS can take place on a timely basis.
- Post Go-Live departmental monitoring, issue resolution and support.

**Reporting**

**Weekly Status Reports**

Liaisons shall be prepared to submit written weekly status reports to their Senior Deployment Liaison which will then be presented as one document to the SCO OCM Manager. The reports must contain an overview of project tasks and activities accomplished during the week, and must include an overview of, reviews, activities, findings and recommendations, and work planned for the next week. The report must also include the number of hours spent on each task or activity for each Contracted staff member.

**Monthly Status Reports**

Liaisons shall be prepared to submit written monthly status reports to their Senior Deployment Liaison which will then be presented as one document to the SCO OCM Manager. The reports must contain an overview of project tasks and activities accomplished during the month, as well as an overview of reviews, activities, findings and recommendations. The report must also include a summary of the number of hours spent on each task or activity, and the hours to date for the contract period.
<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Regular / Recurring</th>
<th>Completion Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly Status Report</td>
<td>X</td>
<td>Friday, close of business</td>
</tr>
<tr>
<td>Monthly Status Report</td>
<td>X</td>
<td>By the tenth (10) calendar day of each month for the previous month.</td>
</tr>
</tbody>
</table>

1.2 Responsibilities of Parties
Within the contract between `<organization-name>` and the State Controller’s Office there are responsibilities of both the contractor and the SCO. Below is a breakdown of those responsibilities.

**State Responsibilities**

- Provide access to business and technical documents as necessary for the Liaisons to complete their tasks.
- Provide one SCO OCM Manager to oversee and manage this contract. He/she will work with the Contractor to facilitate the successful completion of the liaisons obligations.
- Provide building access, which may include issuance of a building access keycard.
- Access to copying machine and a fax machine.
- The State shall provide a work station to include a computer
- The State will not reimburse for travel to and from the project site or for State-directed travel within Sacramento or Yolo County.
- The State is not responsible for Contractor’s losses on State property, or otherwise, caused by any reason.

**Contractor Responsibilities**

- Liaisons shall store all project work papers, hardcopy and electronic copy, in the file structures established by the SCO Project Management Office.
- The Contractor shall provide a laptop and cellular telephone for each staff for use when the staff member is on State-directed travel.
- All liaisons assigned to the TFC Project must comply with all SCO security and confidentiality policies and procedures (see Procurement Library).
- Liaisons shall adhere to SCO policies, i.e., policy on identification badges/keycards and requirements for cardholders. This includes returning the card upon completion of contract.
- The Contractor shall not be responsible for capturing or tracking project time for State resources.
• Services provided under this contract shall be performed by the liaisons in a manner that will not disrupt the operational needs of the State.

• All buildings, appurtenances, and furnishings shall be protected by liaisons from damage caused by work performed under this contract. Such damages to the foregoing, upon approval by the State, shall be repaired and/or replaced at Contractor’s expense by State approved methods, so as to restore the damaged areas to their original condition.

• Liaisons assigned to this contract (employees and/or subcontractors) will exercise all necessary caution to avoid any injury to persons or any damage to property.

• Contractor is responsible for the health and safety protection of its employees in the performance of this contract.

• All Liaisons (and subcontractors) shall participate in emergency disaster exercises.

• All Liaisons shall agree and adhere to the SCO Information Technology Security Policies, Standards, and Guidelines.

1.3 Project Team Travel

Any travel must be pre-approved by SCO. For preapproved travel, the travel and per diem rates shall be set in accordance with the Department of Personnel Administration policies (http://www.dpa.ca.gov/personnel-policies/travel/hr-staff.htm). Travel expenses incurred by the Contractor will be reimbursed in accordance with State of California travel time and per diem rules and verified receipts per SAM Section 0774 “Travel and related reimbursement of persons not State employees.”

Notwithstanding the contract provisions, the State will not be responsible for the cost of travel to bring Contractor personnel to the project site to commence work. However, if requested by the SCO, the State will be responsible for the cost of travel from one (1) California agency site to another. The SCO will not reimburse the Contractor for State-directed travel within Sacramento or Yolo County. The State shall pay travel time for State-directed travel outside of Sacramento or Yolo County.
2. 21st Century Project Overview

The State Controller’s Office is responsible for paying approximately 250,000 state civil service employees through its existing legacy system. Although this 30 plus year old, highly customized system has served the State well, it lacks the flexibility to adapt to the changing needs of government today as well as for the future.

To support the State’s ongoing human resources and payroll system needs a decision was made to purchase a new system that would provide a technically advanced solution and create the functionality required to support another generation of state government. The new system, referred to as MyCalPAYS, offers benefits to the state’s human resources/payroll staff and state employees. Some of these benefits include:

- Reduced paper transactions
- Real-time updates to human resources information
- Improved reporting from a single database of information
- Faster processing of transactions, such as merit salary adjustments, promotions and new hires
- Improved management of human resources information and business processes
- Reduced and/or eliminated reliance on departmental legacy systems

The new system will be deployed to departments using the following phased approach. Please review the high level deployment figure (Figure 1) found below for go-live dates:

- The 14,000 employees included in the 26 Pilot 1 and 2 departments will receive their first MyCalPAYS payroll checks in October 2011
- The 75,000 employees included in the 52 Wave 3 departments will receive their first MyCalPAYS payroll checks in January 2012
- The 68,000 employees included in the 8 Wave 4 departments will receive their first MyCalPAYS payroll checks in July 2012
- The 84,000 employees included in the 77 Wave 5 departments will receive their first MyCalPAYS payroll checks in October 2012.
In the spring of 2012, Employee Self Service will be rolled out to Pilot 1 and 2 department employees. With minimal training, through any computer with an internet connection, employees will be able to, among other things:

- Securely update personal information (e.g. address, phone numbers)
- Change or add banking information
- View and print past and current pay stubs
- View available quota balances
- Enter attendance and absences

Updates and system information will continue to be shared with departments up to and throughout their respective go-live dates.
3. Organizational Structure

The State Controller’s Office is comprised of 6 divisions which are responsible for issuing payments for the State’s bills; processing all personnel and payroll transactions for state civil service exempt employees, state university and college system employees; accounting for and controlling the disbursement of all state funds; determining legality and accuracy of claims against the State; auditing various local and state government programs; ensuring transparency of the State’s financial condition; informing the public of financial city, county, and district government financial transactions, and administering the Unclaimed Property Law, Property Tax Postponement Program, and Uniform State Payroll System.

Figure 2: SCO Organizational Structure

Personnel & Payroll Services Division (PPSD): PPSD maintains the Legacy and CalATERS systems, as well as provides support to the end users working on those systems. In addition, PPSD is one of the main sponsors of TFC Project efforts.

Figure 3: PPSD Organizational Structure

TFC Project: TFC Project staff work with PPSD and other SCO divisions to procure, design, and develop the new automated Human Resource Management System, MyCalPAYS. Staff have been organized and tasked with assignments as indicated below:
Figure 4: TFC Project Organizational Structure

Project Advisors
Lowell Magee & Andrew Koenigsberg

21st Century Project (TFC)
Dave Dawson, Project Executive

Laurye Gage (SCO)
PMO, Project Manager

Lisa Crowe (SCO)

Joe Gioffre (SAP)
PMO, Project Manager
Jeffrey Papajcik (SAP)
PMO, Integration

Technical Team Leads:
Kathy Ailor (SCO)
Martin Geres (SAP)

Business Operations Team (Functional) Leads:
Dennis Duarte (SCO)
Elaine Kennedy (SAP)

OCM Leads:
Kristie Santos (SCO)
Claudia Mandelli (SAP)

Table 1: TFC Team Work Assignments

<table>
<thead>
<tr>
<th>PPO</th>
<th>PMO</th>
<th>Technical</th>
<th>Functional</th>
<th>OCM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget/Fiscal Management</td>
<td>Staffing</td>
<td>Data Conversion</td>
<td>Business Analysis</td>
<td>Communications</td>
</tr>
<tr>
<td>Facilities/Administration</td>
<td>Workplan</td>
<td>Development</td>
<td>Configuration Activities</td>
<td>Deployment</td>
</tr>
<tr>
<td>State Project Staff and HR Training</td>
<td>Deliverable Management</td>
<td>Reporting</td>
<td>Customization Analysis</td>
<td>End-User Training</td>
</tr>
<tr>
<td>Project Library</td>
<td>Change Order Management</td>
<td>Security</td>
<td>Labor Impact Analysis</td>
<td>Workforce Transition</td>
</tr>
<tr>
<td></td>
<td>Issue/Risk Management</td>
<td>Portal</td>
<td>Testing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contract Management</td>
<td>Netweaver</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Status Reporting</td>
<td>IT Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Quality Assurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Governance</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Organizational Change Management (OCM): The OCM team provides expertise in preparing the State workforce for the implementation of MyCalPAYS. They work in partnership with the departments to ensure that end users receive training and support to be successful in their new environment.

Figure 5: OCM Organizational Structure
**OCM Deployment Team**: The Deployment Team works with the OCM, Technical, and Functional Teams, as well as the PPO in order to ensure that departments receive appropriate information and monitor department progress toward successful deployment.

![OCM Deployment Team Organizational Structure](image-url)
4. Governance Model

The TFC Project is commissioned by the State Controller and is guided by the steering committee, Business Transformation Council (BTC) and the Configuration Standardization Committee (CSC). The TFC Change Management business and technical teams work with the Department Support Teams to ensure successful implementation of MyCalPAYS. Figure 7 below shows the governance model used for the TFC Project.
5. Project and Department Alignment

It is critical that the TFC Project team work hand-in-hand with the departments. This alignment allows for different, yet supporting, deployment roles and responsibilities to support department readiness.

The TFC Project team identifies the work, the processes and the timing. The departments are responsible for ensuring the work is completed. The TFC Project team will collaborate with the departments to coordinate activities supporting a seamless execution of the deployment strategy. To support this effort the departments have Department Support Teams (DST).

5.1 Department Support Teams (DSTs)

A key strategy to the successful system deployment includes the addition of key department resources during each wave. The TFC Project has established a network of DSTs across all impacted departments. These teams are comprised of individuals at various levels in the organization. A critical role in the network is the DST Coordinator who acts as a central point for the coordination of deployment activities within their department.

The DST network, and its alignment with the TFC Project, will be the backbone of the site readiness plan. Below is the DST and TFC Project alignment structure.

Within the network are a wide range of resources throughout the departments. DST Coordinators for each impacted department have been identified and engaged. Additionally, department resources will partner with the DST Coordinator as appropriate to execute specific deployment and site readiness activities.
The table below describes the various roles within the Department Support Team.

**Table 2: Department Support Teams**

<table>
<thead>
<tr>
<th>DST ROLE</th>
<th>RESPONSIBILITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Department Sponsor</strong></td>
<td>✐ Serve as key decision maker for changes to department policies and procedures&lt;br&gt; ✐ Actively promotes the Project within the department&lt;br&gt; ✐ Allocates resource to support activities of the Project for the department&lt;br&gt; ✐ Ensures department readiness is met through regular reviews and assessments&lt;br&gt; ✐ Coordinates with Project Communication Team to schedule and distribute Project communications&lt;br&gt; ✐ Works collaboratively with the DST Coordinator to resolve departmental issues and risks</td>
</tr>
<tr>
<td><strong>Department Coordinator</strong></td>
<td>✐ Act as the primary contact point for the department to the Project&lt;br&gt; ✐ Facilitates the decision making process or escalates as appropriate to the Department Sponsor&lt;br&gt; ✐ Identifies key department resources to fill potential DST roles&lt;br&gt; ✐ Manages department issues and risks related to deployment and escalate to Department Sponsor as appropriate&lt;br&gt; ✐ Monitors department readiness participation in regularly scheduled reviews and assessments&lt;br&gt; ✐ Reports on the progress of the department on assigned tasks and activities</td>
</tr>
<tr>
<td><strong>Department Human Resources Professional</strong></td>
<td>✐ Gathers, submits and participates in data cleansing and validation activities&lt;br&gt; ✐ Identifies potential changes to operations and proposes solutions as appropriate&lt;br&gt; ✐ Gathers, submits and validates leave and organizational data to populate the new system&lt;br&gt; ✐ Participate in testing (optional)&lt;br&gt; ✐ Participate in final department deployment&lt;br&gt; ✐ Actively participates in role mapping and validation for the department&lt;br&gt; ✐ Escalates issues and concerns to the DST Coordinator</td>
</tr>
<tr>
<td>DST ROLE</td>
<td>RESPONSIBILITIES</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Department Training Coordinator</td>
<td>- Work with Project Training staff to:</td>
</tr>
<tr>
<td></td>
<td>• Determine staff training needs</td>
</tr>
<tr>
<td></td>
<td>• Schedule HR staff in training</td>
</tr>
<tr>
<td></td>
<td>• Validate proposed training curriculum</td>
</tr>
<tr>
<td></td>
<td>• Track training attendance</td>
</tr>
<tr>
<td></td>
<td>- Escalate issues/concerns to DST Coordinator</td>
</tr>
<tr>
<td>HR Representative (Classification and Pay Professional)</td>
<td>- Participates in analysis and presentation of job classification and study results in partnership with Workforce Transition</td>
</tr>
<tr>
<td></td>
<td>- Validates Role to Classification mapping results</td>
</tr>
<tr>
<td></td>
<td>- Escalate issues/concerns to DST Coordinator</td>
</tr>
<tr>
<td>Department Information Technology Representative</td>
<td>- Responsible for implementing required departmental changes to deploy the MyCalPAYS solution (hardware, network, SAPGUI, etc.)</td>
</tr>
<tr>
<td></td>
<td>- Actively participates in unique departmental testing activities (time interfaces, etc.)</td>
</tr>
<tr>
<td></td>
<td>- Leads departmental automated data loading and data cleansing activities</td>
</tr>
<tr>
<td></td>
<td>- Escalate issues/concerns to DST Coordinator</td>
</tr>
</tbody>
</table>
6. Master Readiness Task List (MRTL)

The Master Readiness Task List (MRTL) details, phase by phase, the tasks associated with preparing departments for the implementation of MyCalPAYS. The DST network, and its alignment with the TFC Project, will be the backbone of executing the MRTL. Figure 9 provides an overview of the MRTL and the overall readiness approach.

The MRTL has been created using the current Project plan and Project subject matter expert review. This list represents the “who, what, when” of department preparation, which allows the DST to organize the work and assign the appropriate department expert.

The TFC Project monitors department readiness achievement and progress using a structured Readiness Dashboard process. The TFC Project assigns Deployment Liaisons to work directly with departments via the DSTs coordinating tasks across functional, technical, and change management areas and monitoring department readiness for Go-Live. Readiness Dashboard templates are used to progressively report department readiness status to the TFC Project. Through this process, the TFC Project will proactively identify and address issues and risks to department readiness. As issues and risks emerge, the TFC Project will promptly address them and if necessary, escalate to the appropriate level of leadership, from the Project Management Office (PMO) to department sponsors and, for the most serious issues, to the steering committee and executives.
The key to site readiness is the MRTL, which provides the tasks and milestones necessary for departments to successfully Go-Live. Department readiness is logically grouped in the following components which are also reflected in the MRTL:

- **User Readiness** includes preparation activities necessary for users to understand how the business process and technical changes impact their daily actions, and prepares them to use the solution. This includes communications, training and workforce transition. These activities are primarily executed by DST Human Resource (HR) representatives and DST Training Coordinators.

- **Functional Readiness** includes activities necessary to make sure that both the solution and departments are ready for the solution implementation. This includes data cleansing and collection. These activities are primarily executed by DST HR representatives.

- **Site Readiness** includes integrated activities that require collaboration between department representatives (such as Information Technology (IT) and HR), such as cutover, freeze, and Go-Live support. These activities are primarily executed by DST Coordinators, supported by all other DST members.

- **Technical Readiness** preparation activities are related to infrastructure, interfaces, and data conversion. These activities are primarily executed by DST IT representatives.

In addition, communications supports all readiness areas with regular or ad-hoc showcases / workshops, meetings, communications and other events. These address the communication needs of the organization at multiple levels, with the ongoing DST Meetings, targeted to DST members and executive reviews targeted to leadership.
7. Readiness Dashboard

The Readiness Dashboard is the tool the TFC Project uses to monitor each department’s preparation.

7.1 Readiness Dashboard Process

The TFC Team developed the dashboard, which is based on the MRTL, as a comprehensive view of how each Department is performing for the PMO and Steering Committee.

The process for the formal reporting of readiness - performed monthly – is the dashboard to track status for each readiness task, measuring actual execution against planned progress.

Every month, a template is produced and distributed to the TFC Deployment Liaisons and the DST Coordinators. Dashboard templates show the planned progress for each task, and will be used as reference for TFC Deployment Liaisons to meet with the DST Coordinator and ensure execution.

The TFC Deployment Liaisons complete the status reporting and validate it with the DST Coordinator. The TFC Deployment Liaison submits the template to the TFC OCM team. The compiled data for the wave will be analyzed and reviewed by the TFC OCM team. The TFC OCM team will review the raw data provided by the departments and validate their ratings. In some cases, especially in case of large, critical tasks such as data collection, they’ll validate with other project team members (e.g., data collection tool has been submitted to TFC). Task ratings may be manually modified by each team, after discussion and review of other sources of data, or with departments, before being presented to the PMO.

The TFC Project team will also make a determination on the tasks that will be used for the PMO Dashboard Summary Report. Key tasks such as role mapping in scope for the time period would be highlighted in the view.

This information will be used for monthly meetings with the PMO for the review of readiness status, risks and issues. Risks and issues will be addressed using the Issue Escalation Process.

This information will also be communicated to departments. Communicating dashboard status is crucial for the effectiveness of the readiness process. By communicating aggregate information on readiness status, a feedback loop will be created with departments that can foster completion of readiness tasks and prevent issues. Each month, the aggregate figures will be communicated. Department Sponsors will also receive communication from the TFC Deployment Team about their unique ratings on key readiness items.

The following image shows an example dashboard for a department.
### Functional Readiness - Data & Testing

<table>
<thead>
<tr>
<th>Readiness Activity</th>
<th>Due Date</th>
<th>Planned %</th>
<th>Actual %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Collection Stage 2 Communication and Training</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preparation</td>
<td>Aug '10</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Attend data collection training (full data w/Excel) for Org, Positions</td>
<td>Sep '10</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Attend data collection training (full data w/Excel) for Garnishment, Disability</td>
<td>Oct '10</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Data Collection Stage 2 (for Comparison Text)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Collection in Excel (full data) for Org, Positions, Work Schedules</td>
<td>Dec '10</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Data Collection in Excel (full data) for Garnishment, Disability</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>System Immersion</td>
<td>Data Collection Stage 3 (for Comparison Text 2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain collected data</td>
<td>Mar '11</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Organizational Readiness</td>
<td>Data Collection Stage 4 (for Merck Culture 1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain collected data</td>
<td>Jul '11</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Go-Live</td>
<td>User Adoption Workshops (optional)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select employees for UAW, if participating</td>
<td>May '11</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Execute UAM, if participating</td>
<td>Jun '11</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Data Collection Stage 6 (for Production Go-Live)</td>
<td>Final Data Collection/Cleansing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sep '11</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Ongoing</td>
<td>Data Cleansing (ongoing)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participate in data cleansing</td>
<td>Sep '11</td>
<td>10%</td>
<td>10%</td>
</tr>
</tbody>
</table>

### User Readiness - Change & Training

<table>
<thead>
<tr>
<th>Readiness Activity</th>
<th>Due Date</th>
<th>Planned %</th>
<th>Actual %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kickoff</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Readiness Assessment</td>
<td>Complete Readiness Initial Assessment</td>
<td>Sep '10</td>
<td>100%</td>
</tr>
<tr>
<td>Preparation</td>
<td>Change Impact</td>
<td>Participate in change impact workshops</td>
<td>Dec '10</td>
</tr>
<tr>
<td></td>
<td>Assess unique dept impact</td>
<td>Jan '11</td>
<td>50%</td>
</tr>
<tr>
<td>System Immersion</td>
<td>Role/User Mapping</td>
<td>End-user role mapping workshops</td>
<td>Jan '11</td>
</tr>
<tr>
<td>System Immersion</td>
<td>-</td>
<td>Map MyCaPS authorization roles to dept users</td>
<td>Feb '11</td>
</tr>
<tr>
<td>Organizational Readiness</td>
<td>Individual Training Plans</td>
<td>Distribute Individual Training Plans</td>
<td>Mar '11</td>
</tr>
<tr>
<td>Training Enrollment</td>
<td>Review recommended training courses</td>
<td>Mar '11</td>
<td>0%</td>
</tr>
<tr>
<td>System Immersion</td>
<td>-</td>
<td>Security Validation Workshop</td>
<td>Jul '11</td>
</tr>
<tr>
<td>Training High-Level Overview</td>
<td>Enroll in high-level training overview</td>
<td>Jul '11</td>
<td>0%</td>
</tr>
<tr>
<td>Training Registration</td>
<td>Register HR staff for training</td>
<td>Jul '11</td>
<td>0%</td>
</tr>
<tr>
<td>Training Coordination</td>
<td>Training conference calls</td>
<td>Aug '11</td>
<td>0%</td>
</tr>
<tr>
<td>Go-Live</td>
<td>Training Attendance</td>
<td>Monitor attendance of end-user training</td>
<td>Sep '11</td>
</tr>
<tr>
<td>Post-Go-Live</td>
<td>Training Evaluation &amp; Lessons Learned</td>
<td>Evaluation/assess training effectiveness</td>
<td>Dec '11</td>
</tr>
</tbody>
</table>

### Technical Readiness - Infrastructure

<table>
<thead>
<tr>
<th>Readiness Activity</th>
<th>Due Date</th>
<th>Planned %</th>
<th>Actual %</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Immersion</td>
<td>Technical Requirements Evaluation &amp; Preparation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assess dept infrastructure</td>
<td>Jan '11</td>
<td>75%</td>
<td>75%</td>
</tr>
<tr>
<td>Interface Testing I &amp; II</td>
<td>Interface testing (outbound)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mar '11</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Interface testing (inbound)</td>
<td>Apr '11</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Interface Testing III</td>
<td>Interface testing (all)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr '11</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Technical Requirements Evaluation &amp; Preparation</td>
<td>Test user access</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apr '11</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Software Installation</td>
<td>Install software on user desktops</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jun '11</td>
<td>0%</td>
<td>0%</td>
<td></td>
</tr>
</tbody>
</table>

### Go-Live/DST - Cutover & Support

<table>
<thead>
<tr>
<th>Readiness Activity</th>
<th>Due Date</th>
<th>Planned %</th>
<th>Actual %</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Immersion</td>
<td>Cutover/Pause Preparation (Part 1)</td>
<td>Cutover Overview Chart</td>
<td>Mar '11</td>
</tr>
<tr>
<td>Organizational Readiness</td>
<td>Support Preparation</td>
<td>Assist with communication of support model</td>
<td>Oct '11</td>
</tr>
<tr>
<td>Go-Live</td>
<td>Cutover/Pause Preparation (Part 2)</td>
<td>Cutover Showcase</td>
<td>Aug '11</td>
</tr>
<tr>
<td>Cutover</td>
<td></td>
<td></td>
<td>Aug '11</td>
</tr>
<tr>
<td>Cutover</td>
<td>Perform cutover activities</td>
<td></td>
<td>Sep '11</td>
</tr>
<tr>
<td>Cutover</td>
<td>Coordinate cutover communication</td>
<td></td>
<td>Sep '11</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Activate and troubleshoot interfaces and connectivity</td>
<td></td>
</tr>
</tbody>
</table>

See the Deployment Liaison Dashboard Procedures section in this document (Page 23, Section 7.3) for step-by-step Dashboard instructions and Deployment Liaison responsibilities within that process.

### 7.2 Rating Criteria

The TFC Deployment Liaison will use those agreed-upon definitions in order to report status. Guidelines used for tracking status vary depending on the type of task being completed. There are three types of tasks:

- **Process.** Process milestones have a defined process that the activity moves through. One example of a process milestone is “interface testing”. Interface testing requires the completion of multiple steps, which have to be executed both centrally and at the department level.

- **Event.** The task consists of an event, such as meeting, workshop, or training. There are numerous examples of event tasks, the most prominent being end-user training.
**Fixed Scope.** The task consists of a defined amount of work that has to be completed, for example, the collection of Organization Management Data.

The table below illustrates the guidelines for status reporting for each task type. The scale includes an initiation (0%), a completion (100%), and several intermediate checkpoints (25%, 50%, 75%). In some cases additional percentages may be used to track progress in the initial stages (10%) and in the final stages (90%). This is because tasks with long durations and complexity will need frequent intermediate checkpoints to ensure that they are on track.

**Table 3: Dashboard Status Guidelines**

<table>
<thead>
<tr>
<th>Task Type</th>
<th>0%</th>
<th>10%</th>
<th>25%</th>
<th>50%</th>
<th>75%</th>
<th>90%</th>
<th>100%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not started</td>
<td>Process has started (or document created)</td>
<td>25% of the process steps have been completed</td>
<td>50% of the process steps have been completed</td>
<td>75% of the process steps have been completed</td>
<td>90% of the process steps have been completed</td>
<td>Process has been completed</td>
<td></td>
</tr>
<tr>
<td>Event</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not started</td>
<td>Event has been scheduled or registration complete</td>
<td>Attendance of 25% of total events completed</td>
<td>Attendance of 50% of total events completed</td>
<td>Attendance of 75% of total events completed</td>
<td>Attendance of 90% of total events completed</td>
<td>Attendance of event or all events completed</td>
<td></td>
</tr>
<tr>
<td>Fixed Scope</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not started</td>
<td>10% of total items have been completed</td>
<td>25% of total items have been completed</td>
<td>50% of total items have been completed</td>
<td>75% of total items have been completed</td>
<td>90% of total items have been completed</td>
<td>All items in scope have been completed</td>
<td></td>
</tr>
</tbody>
</table>

Depending on the gap between planned status and actual status, departments may be rated according to a set of criteria, illustrated below.

**Table 4: Dashboard Rating Criteria**

<table>
<thead>
<tr>
<th>Rating</th>
<th>Rating Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>On Schedule – task actual completion matches or is above the planned % complete.</td>
</tr>
<tr>
<td>Yellow</td>
<td>Manageable Issues or risks identified. Task is behind schedule.</td>
</tr>
<tr>
<td>Red</td>
<td>Serious issues or risks are identified. Tasks missed the due date or there is an escalated issue related to the activity.</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>No task scheduled for the month.</td>
</tr>
</tbody>
</table>
7.3 Deployment Liaison Dashboard Procedures
See the Master Readiness Task List (MRTL) and Dashboard information above for an overview on the Readiness Dashboards, including why and how they are used.

Monthly Dashboard Procedures – Monthly Calendar

- Last 5 business days of current month – Deployment liaisons meet with departments to review current month’s dashboard and proposed ratings for each task
- Thursday before first of next month – Deployment Liaisons must submit a printed dashboard template¹ for each of their assigned departments with the percent complete indicated for assigned each task to the “Completed Dashboard” basket outside of Kathy James’ office
- First Wednesday of month – All dashboards are reviewed with the TFC PMO and final ratings confirmed
  - All departments with an escalated issue (red rating) are reviewed with the PMO at this point²
  - Departments behind schedule (yellow rating) are reviewed and discussed in the weekly Liaisons meetings.
- First week of month –
  - Finalized dashboards for previous month are published in SharePoint¹
  - Dashboards for current month are published in SharePoint¹

Additional information regarding the Dashboard Process, rating scales, and review can be found in Deliverable 43 – Site Readiness Process.

Readiness Dashboards on SharePoint

Each department has a Readiness Dashboard folder on the appropriate Pilot/Wave tab on the DST SharePoint website. Click on the department acronym to open the secured folder for that department.

![Dashboard](image)
The current month’s Readiness Dashboard Template is always available from the main folder.

¹ See Readiness Dashboards on SharePoint section below for additional information where completed dashboards and dashboard templates are available.
² All departments with a yellow or red rating must be escalated to the PMO. See the Formal Escalation Process section for additional information.
All dashboards for previous months are available from the Archived Dashboard folder.

Note: If your department has more than one dashboard (for example, your department is participating in the inbound time interfaces and the data collection sample), you will see two Dashboard Templates for the current month – each named appropriately. Once both dashboards have been evaluated and a percent complete assigned to each task, only one dashboard will be published to the Archived Dashboards folder. This final dashboard will include all tasks on both template dashboards.

7.4 Resources
Multiple resources are available to assist you in learning more about State employees, labor unions, the State Controller’s Office (SCO), and the 21st Century (TFC) Project. Below is a listing of some of these resources.

State Employees
- Labor Unions – The Bargaining Unit contracts are maintained by the Department of Personnel Administration (DPA) and available via their website.
  - [http://www.dpa.ca.gov/bargaining/contracts/index.htm](http://www.dpa.ca.gov/bargaining/contracts/index.htm)
  - Bargaining Unit profiles can be found on SCOs intranet, COIN.
- Benefits – State employee health, dental, flexible spending accounts, and disability benefits are outlined by DPA.
  - [http://www.dpa.ca.gov/benefits/index.htm](http://www.dpa.ca.gov/benefits/index.htm)
- State employee demographics are kept on the SCO public website.
  - [http://www.sco.ca.gov/ppsdpd Empinfo Demo.html](http://www.sco.ca.gov/ppsdpd Empinfo Demo.html)

Travel Resources
- Department of Personnel Administration (DPA) – [http://www.dpa.ca.gov/personnel-policies/travel/hr-staff.htm](http://www.dpa.ca.gov/personnel-policies/travel/hr-staff.htm)
**Terminology References**
- MyCalPAYS Terminology Guide – Chapter 8 – Glossary of the DST Project Binder in each Pilot/Wave tab (see SharePoint – DST SharePoint Site: Pilot 1 and 2, and Wave 3 – 5 section below for additional information)
  - Note that this is a living document and, as such, will be continually updated

**State Controller’s Office**
Additional information about the SCO, its mission, and functions can be found on:
- SCO public website – [www.sco.ca.gov](http://www.sco.ca.gov), and

**TFC Project**
The TFC Project has multiple resources set up to disseminate the most up-to-date information about the Project.

**TFC Project External Web Page**
The 21st Century Project external web page is part of the SCO public website. This page includes information such as the Project Charter, organization and governance information, the most recent Insights Newsletter, and interface communications.

- [http://www.sco.ca.gov/21century.html](http://www.sco.ca.gov/21century.html)

**SharePoint Overview**

The TFC Project has designed a SharePoint site to deploy information to Project staff, as well as staff in the departments. This website can be accessed from any computer with an internet connection. For additional information on how to log onto the TFC site, see Appendix A: DST SharePoint Quick Reference Guide. Note that a user name and password is required to access this site. If you do not have a user name and password, please contact Mary Kessler (MKessler@sco.ca.gov, 916.375.7429). Below is additional information regarding SharePoint.
To access the Project Team site, log onto SharePoint then click the Project Team Site tab. This site has a vast amount of information. A few key components of this site have been highlighted below:

- **SAP Deliverable Expectation Documents (DEDs)** – Library of all DEDs
- **SAP Deliverables** – Library of all Deliverables
- **Communications Calendar** – Calendar of planned communication events
- **Deliverables Tracking** – Tracks planned and actual dates for receipt, review and approval of contract deliverables and provides a link to the most current document
- **Realization Phase** – Work in progress workspace

**SharePoint – Project Team Site (cont’d.)**

- **Quick Reference Library** – Links to frequently needed Project information including password change instructions, department name abbreviations, FAQs, and the LoadSpring timesheet
**Document Library** – General documents to share within the TFC Project Team; see the project phase libraries for work in progress (e.g. Realization Library) for additional documentation.

**Directory** – TFC Project Team names, numbers, and general organizational information

Note: All phone numbers begin with area code 916

**SharePoint – Department Support Team (DST) Site: Main Tab**

To access the DST Site, log onto SharePoint then click the Department Support Team Site tab. This tab is one of 5 tabs that make up the DST Site and contains general information for all departments. This tab also contains Deployment Liaison specific information. A few key components of this site have been highlighted below.

Note: Each department has been assigned one user name and password to access the DST SharePoint site. That account is the only one that each department will receive and should be shared by the Coordinator with whoever needs access to the information housed on the site.
**Deployment Calendar** – Calendar of planned Deployment activities, broken down by Pilot/Wave

**Frequently Asked Questions** – Lists questions and answers, organized by category

**Deployment Liaisons** – Lists Deployment Liaison information for each department

**Deployment Liaison Questions & Answers** – Used to log Deployment Liaison questions that may be 1) internal (e.g., Where is the Confidentiality Release Form for the data collection CDs?) or 2) from the departments (e.g., Will the Personnel Area be assigned by SCO or by the processing department on the Org Structure tab?). See Q&A Process for additional information.

**SharePoint – Department Support Team (DST) Site: Main Tab (cont’d.)**

**Deployment Liaison Concerns** – Used to log all concerns that are determined/exposed when working with the departments. This information will be available for all liaisons and may be used for reporting to project management.
Deployment Library – General documents to share with departments, including the rollout schedule and monthly DST meeting information

Deployment Liaison Library

The Deployment Liaison Library is accessed from the Deployment Library on the DST Main Site tab and was created specifically to allow Deployment Liaisons an area to house and share all Deployment Liaison documentation. A few notes about the library:

- Each liaison may upload documents as appropriate. When uploading a document, be sure to name it clearly as the link will display as whatever the file has been named.
- Each liaison may create folders as appropriate. When creating a folder be sure to name and organize it so that everybody may easily navigate through the files.
- Each Liaison has access to edit, upload, and delete from all areas. Please do not delete any files without checking with the rest of the group, unless it is your own and you know that no one else is using it.
- Departments will not see any of the areas that begin with “Deployment Liaison” with their login credentials. If you are at a department and want to view Deployment Liaison files/areas, you must log in to SharePoint as yourself to do so.

The current structure and some main components of the library have been highlighted below.

Deployment Liaison Welcome Kit – This section includes an electronic version of this Welcome Kit with active hyperlinks to supporting documentation.

Department Specific Liaison Files – An area to keep department specific files such as meeting agendas and notes, provider service information, etc. This information can be accessed if your back-up needs to get information regarding one of your departments. Note: Keep all information
organized by creating a folder for each of your departments.

**Expanded Master Readiness Task Lists (MRTLs)** – Departments have access to their MRTL(s), but Deployment Liaisons have access to much more detailed MRTLs. These documents are housed in this folder and include a MRTL for each Pilot/Wave, Inbound Time, and Sample Data Collection activities.

Monthly Liaison Status Reports – Lists detailed information regarding each escalated department on a monthly basis. See Escalation Process section for additional information on when this documents needs to be completed.

Department Demographic Information – An extract from our department database with detailed information about each department, including how many people perform certain HR functions, total employee population, bargaining unit affiliation, current technology, etc.

**SharePoint – DST SharePoint Site: Pilot 1 and 2, and Wave 3 - 5**

Each Pilot and Wave has a tab in SharePoint where information specific to the departments in that Pilot/Wave is posted. Each tab has the same format and includes a DST Project Binder, as well as Readiness Dashboard.

**DST Project Binder** – Contains all materials that DSTs have received from the Project Teams and is organized based on functional
areas/topics. Click on DST Project Binder then the appropriate Chapter or section to view documents.

Readiness Dashboard – Each department is listed on the appropriate Pilot/Wave tab. Click on the department acronym to open up the secured dashboard folder for that department. See the Dashboard Process section for additional information on dashboards.
8. Q&A Process Overview

The following flow depicts the way in which questions are submitted to the other TFC project teams for resolution. Liaisons must follow this process when submitting questions on behalf of departments that require a response from one of the other TFC project teams.

The Questions & Answers are housed in a database, available on the following location: L:\TFC\QandADB\QandA_Database.accde

Information on how to access and use the Q and A Database is located on the Project Team SharePoint site:

https://ws3-06.myloadspring.com/mycalpays/Project/Project%20Documents/Q%20and%20A%20Database/QandADatabase_JobAid_030111.pdf

The following graphic provides an overview of the Question and Answer Process:
21st Century Project Question and Answer/FAQ Process (FINAL)

OVERVIEW:
The database is designed to capture and store questions asked of the TFC Project. Departments will go through their Deployment Liaison (DL) or the Deployment Mailbox (if they do not have a DL assigned) to ask questions. The DL or mailbox owner will post the question to the database.

Note: Future enhancements to this database include Training questions and potentially project related questions.

1. Question(s) generated from:
   - Project questionnaire
   - Website
   - Presentations
   - Workshops
   - Deployment Liaison interactions w/ Deps
   - Other Project Teams (e.g., DAP, DPA, PPSD, etc.)
   - Third Party Vendors

2. User (e.g., Dept Liaison, Mailbox owner, etc.) accesses Q&A db to check for dup/enter Questions:

3. Is Question a duplicate?
   - No
     4a. User (e.g., Dept Liaison, Mailbox owner, etc.) provides Answer to person who originated Question(s)
   - Yes
     5. Comm Lead logs into Q&A db and checks for Question(s) with status NEW
     6. Comm Lead confirms status of Question(s) with status NEW
        - No
          7. Comm Lead changes status of Question(s) in db to CLOSED
             - Yes
               8. Comm Lead searches for Question(s) with status NEW
               9. POC changes status of Question(s) in db to CLOSED
        10. Comm Lead checks 8th for Questions with status ANSWERED
            11. Comm Lead determines if Question(s) need Project Leadership approval based on criteria (see Approval Criteria)
            12. Approval needed?
               - Yes
                 13. Comm Lead sends Question(s) to Project Leadership
               - No
                 14. Project Leadership reviews/decides/process Question(s)
                 15. Comm Lead posts pending decision to POC
                 16. Comm Lead updates POC status in POC db
                 17. Process Complete

Point of Contact (POC):
Functional – Samantha Vance
Technical – Jane Doe, John Smith
Security – Vicki Gibbs, Shelly Ecker, Carol Yee
PMO – Jeff Rajapala
Training – Laura TK

For questions or comments please contact Mari Riddle,
OCM Communications, 376-8222

NOTES:
1. Process includes all questions received from website, presentations, workshops, Deployment Liaison interactions with departments, etc.
2. The current Dept Liaison Question List will be replaced with database/Q&A process.
3. Need approval process – determine when we need additional approval and what that process is (e.g., if posted to TFC Website-External).
4. Process will need to run by PMO for feedback/approval –仨千会 handle at next POC.
5. Need to review all currently posted questions to confirm/make sure – Mari is doing this effort. Will use XLS spreadsheet for this process.
6. Team will post the database to the Project Shared drive and then all appropriate users can access the database and processes (this can be done after initial scrub of existing questions (garbage cleanout)).
Appendix A: DST SharePoint Quick Reference Guide

Accessing the DST SharePoint Site

The DST SharePoint website has been designed to allow the project team to keep agency DSTs up to date on project deployment activities. In addition to a deployment calendar, the site hosts many deployment-related checklists, presentations, schedules and other project-related information.

1. To access the DST SharePoint site, type https://ws3-06.myloadspring.com/mycalpays/DST/default.aspx in your web browser. It is recommended that you bookmark the page for future reference.

2. Enter your User name and Password typing DOM301 before your actual User name. If you select the Remember my password box the DOM301User name will display on future site visits. Once these are entered, click the OK button to proceed to the site.

3. Users will be directed to the Department Support Team Site’s home page, where they will be able to select the tab that corresponds to their Pilot or Wave specific information.

Some of the DST site features include:

- **Quick Links**: Contains links to deployment specific tasks and activities.
- **Deployment Calendar**: Provides due dates for meetings and other key events.
- **MRTL**: The Master Readiness Task List provides a list of tasks and subtasks required for go live.
- **Readiness Dashboard**: Allows access to each DST’s private/secure section of the site.
- **Welcome Message**: Offers a high-level overview of the DST site’s use and purpose.
- **Announcements**: Provides “need-to-know” project oriented information.
- **DST Binder**: Repository of key deployment documents and information.

Questions regarding the use of or access to this site should be sent to deployment@sco.ca.gov.
Appendix C: 21st Century Project Question and Answer Database – Job Aid

Overview:
The purpose of the Question and Answer (Q and A) Database is to capture and store questions asked of TFC Project. This tool is only used by the 21st Century Project Team members and SCO staff at this time and is managed by the Communications Manager.

Generally, questions are received by Deployment Liaisons, during presentations, or through the Deployment Mailbox. These questions are entered into the database by the Submitter (e.g., Deployment Liaison) and assigned to a Point of Contact (POC). A POC is a Workstream Lead such as a Functional Lead. The POC accesses the database frequently to check for new questions assigned to them. They work with Subject Matter Experts (SMEs) to provide finalized answers to the questions. If questions need Project Leadership approval (e.g., it deals with sensitive topics), the Communications Manager works with the appropriate leadership representatives to review/approve the questions. Once a question is finalized it is marked as Answered at which time the Submitter can provide the finalized answer back to the original source (for example, a Department Support Team Coordinator).

Process Flow (Overview):
For a detailed overview of the process, see the process flow diagram located on the Project Team SharePoint site.

Requesting Access to the Q and A Database:
At this time, access to the Q and A Database is restricted to 21st Century Project Team staff and SCO. In addition, access to the database requires security rights to the share project L: drive (Sconet\Data\Sco\Group). To request access to the database please send an email to: Mari Riddle (mriddle@sco.ca.gov) and copy Jeannie LeTourneau (jletourneau@sco.ca.gov).

For this reason, the database is not available remotely (you must be onsite to access it). We are working to provide a version that is accessible remotely and will send an announcement out what that is available.

Opening the Q and A Database:
The Q and A Database is available on a secured Project Shared Drive folder:

1. Access the secured Project Shared Drive folder: L:\TFC\QandADB.
   
   Note: If you are not mapped to the TFC folder on the L: drive see the Support section below.

2. Click the Q and A Database link to open the database file. The Question and Answers Database window displays:
Using the Q and A Database:

Once you are in the database, there are two primary groups of users: Deployment Liaisons and Point of Contacts (POCs). The Deployment Liaisons group includes Mailbox Owners. Generally, Deployment Liaisons enter new questions and search for answers to their questions. POCs are the contacts representing the various aspects of the project such as the Functional Team, Technical Team, Training Team, Project Management Office, etc. The POCs generally access the database to respond to questions asked by the Deployment Liaisons group members.

Additionally, future users of the database may include the trainers, project management staff, etc. As that happens, announcements will be sent out summarizing the changes.

The tables below provide an overview of the options available to Deployment Liaisons and Point of Contacts, but are not step-by-step instructions. If you need further assistance with using the database please contact Mari Riddle, 376-8622.

### Deployment Liaisons:

Select the **Deployment Liaisons** button from the *Q and A Database* window. The following table provides an overview of each of the options available to Deployment Liaisons:

<table>
<thead>
<tr>
<th>OPTION/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>

*Figure 11: Question and Answers Database window*
<table>
<thead>
<tr>
<th>OPTION/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| Search for a Question      | Search the Q and A database to see if a new question that has come up has already been answered. You can search by Key Word(s), a specific Question ID # if you have it, or by Business Area (Time, Payroll, etc).  
*Note: This includes questions from all statuses (New, Open, Answered, Closed, etc) so you can see if your question has already been entered and, if so, what status it is in.* |
| Add a New Question         | Allows you to add a new question to the database.  
*Notes:*  
• You must first search to see if the question has already been answered.  
• Complete as much information as you have, but don’t worry about Bus Area, Priority, or Assign to if you don’t have that information. This will be completed by the POC or the Communications Manager.  
• If your name is not on the Question Submitted By: dropdown list, contact Mari Riddle, 376-8622. |
| Search My ANSWERED Questions | Search for all questions with status Answered or Ans/NeedsAppr by the person who submitted the question.  
Select your name from the dropdown list to see all the answered questions you submitted.  
*Note: ANS/NEEDSAPPR status indicates the question has been answered by a Point of Contact working with the appropriate Subject Matter Expert, but it still Needs Approval from Project Leadership. The Communications Manager facilitates this process.* |
| Frequently Asked Questions | Displays the Frequently Asked Questions in a report. FAQ is determined by a checkbox which can be selected by the Point of Contact, Subject Matter Expert, Communications Manager, etc. Anyone who has authority to edit the question details. The Communications Manager will determine where the FAQs are posted and how often.  
*Note: Since this is a report, it can be printed to PDF and posted on any website, shared with departments, etc.* |
<table>
<thead>
<tr>
<th>OPTION/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NEW Questions by Date</strong></td>
<td>Displays the questions with the status NEW received within the date range provided. When you select this report a pop up window asks you to enter the start and end dates.</td>
</tr>
</tbody>
</table>
|                              | **Notes:**  
|                              |  
|                              |   • NEW status indicates the question has been entered into the database, but not yet assigned to a Point of Contact.  
|                              |   • The date format must be entered in mm/dd/yyyy. For example, 02/14/2011.  |
| **OPEN Questions by Submitter** | Displays the questions with the status OPEN/ASSIGNED grouped by the person who submitted the question.  |
|                              | **Notes:**  
|                              |   • OPEN/ASSIGNED status indicates the question has been entered into the database and assigned to a Point of Contact, but the answer is not yet finalized (and/or approved if required).  |
| **ANS/CLOSED Questions by Dept** | Displays the questions with the statuses ANSWERED, ANS/NEEDS APPR, or CLOSED/COMMUNICATED grouped by Department.  |
|                              | **Notes:**  
|                              |   • ANSWERED status indicates the question has been answered by a Point of Contact working with the appropriate Subject Matter Expert.  
|                              |   • ANS/NEEDSAPPR status indicates the question has been answered by a Point of Contact working with the appropriate Subject Matter Expert, but it still Needs Approval from Project Leadership. The Communications Manager facilitates this process.  
|                              |   • CLOSED/COMMUNICATED status indicates the answer to the question has been communicated back to the person/department asking the question.  |
| **CLOSED Questions by Submitter** | Displays the questions with the status CLOSED/COMMUNICATED by the person who submitted the question. Select your name from the dropdown list to see all the closed questions you submitted.  |
|                              | **Note:** CLOSED/COMMUNICATED status indicates the answer to the question has been communicated back to the person/department asking the question.
<table>
<thead>
<tr>
<th><strong>OPTION/BUTTON</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ALL Questions by Submitter</strong></td>
<td>Displays all questions in the database (regardless of question status) by the person who submitted the question.</td>
</tr>
<tr>
<td></td>
<td>When you select this report a pop up window asks you to enter the first few letters of the submitter’s first or last name. Best practice is to enter the first 3-4 letters. For example, enter <em>smi</em> to search for Smith.</td>
</tr>
<tr>
<td><strong>ALL Questions by Department</strong></td>
<td>Displays all questions in the database (regardless of question status) by the Department where the question originally generated.</td>
</tr>
<tr>
<td></td>
<td>When you select this report a pop up window asks you to enter the first few letters of the department’s name. Best practice is to enter 3-4 letters from the unique part of the Department name.</td>
</tr>
<tr>
<td></td>
<td>For example, enter <em>cont</em> or <em>contr</em> to search for State Controller’s Office. If you enter <em>state</em>, there are a large number of departments with State in the name so your results will include all of these.</td>
</tr>
<tr>
<td></td>
<td>The report groups the results by department (in case multiple departments match the search criteria), then by Question Status (Answered, Closed, etc).</td>
</tr>
<tr>
<td><strong>ALL Questions by Type</strong></td>
<td>Displays all questions in the database (regardless of question status) grouped by the type of question: Security, Functional, PMO, Training, etc.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If a field is blank, it indicates the information has not been provided. For example, if Department field is blank, it indicates a Department Name was not provided in association with the question.</td>
</tr>
</tbody>
</table>

If you do not see the information you need, please contact the Communications Manager, Mari Riddle, 376-8622. For additional assistance see the **Support** section located at the end of this document.
**Point of Contacts:**
Select the **Point of Contacts** button from the *Q and A Database* window. The following table provides an overview of each of the options available to Point of Contacts:

<table>
<thead>
<tr>
<th>OPTION/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
</table>
| **NEW Questions by POC** | Search for questions with the status NEW which are assigned to the Point of Contact you select from the dropdown list. This allows the POC to work on responding to the question with the appropriate Subject Matter Expert. **Notes:**  
  - *NEW status indicates the question has been entered into the database, but not yet assigned to a Point of Contact.*  
  - *Once the POC begins working on the question they change the status to OPEN/ASSIGNED.* |
| **OPEN Questions by POC** | Search for questions with the status OPEN/ASSIGNED which are assigned to the Point of Contact you select from the dropdown list. This allows the POC to work on responding to the question with the appropriate Subject Matter Expert. **Notes:**  
  - *OPEN/ASSIGNED status indicates the question has been entered into the database and assigned to a Point of Contact, but the answer is not yet finalized (and/or approved if required).*  
  - *Once the POC begins working on the question they change the status to OPEN/ASSIGNED.*  
  - *Once the POC has finalized the response, they change the status to ANSWERED.* |
<table>
<thead>
<tr>
<th>OPTION/BUTTON</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ANSWERED Questions by POC</strong></td>
<td>Search for questions with the status ANSWERED or ANS/NEEDSAPPR which are assigned to the Point of Contact you select from the dropdown list.</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td>- The only attributes that can be modified for questions with the status ANSWERED or ANS/NEEDSAPPR are Status, Duplicate, or OK to Display.</td>
</tr>
<tr>
<td></td>
<td>- If an answer needs to be revised, the POC can change the status to OPEN/ASSIGNED and then access the question through the OPEN Questions by POC option to make the appropriate changes.</td>
</tr>
<tr>
<td></td>
<td>- ANS/NEEDSAPPR status indicates the question has been answered by a Point of Contact working with the appropriate Subject Matter Expert, but it still Needs Approval from Project Leadership. The Communications Manager facilitates this process.</td>
</tr>
<tr>
<td></td>
<td>- Once the Communications Manager has received approval for the response, they change the status to ANSWERED.</td>
</tr>
<tr>
<td><strong>CLOSED Questions by POC</strong></td>
<td>Search for questions with the status CLOSED/COMMUNICATED which are assigned to the Point of Contact you select from the dropdown list. This allows the POC to work on responding to the question with the appropriate Subject Matter Expert.</td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td>- CLOSED/COMMUNICATED status indicates the answer to the question has been communicated back to the person/department asking the question.</td>
</tr>
<tr>
<td></td>
<td>- The only attributes that can be modified for questions with the status CLOSED/COMMUNICATED are Duplicate or OK to Display.</td>
</tr>
<tr>
<td></td>
<td>- If an answer needs to be revised, the question must be resubmitted as a NEW question since the answer has already been communicated to the person/department asking the orig. question. Be sure to add a note referencing the ID # of the original (Closed) question and question source. The original question will be archive and the person/department asking the original question should be sent an update.</td>
</tr>
<tr>
<td><strong>ALL Questions by ID#</strong></td>
<td>Search for a question by the identification number. This is useful when you want to view or edit a specific question.</td>
</tr>
<tr>
<td>Option/Button</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| **ALL Questions by Dep. Liaison SP ID#** | Search for a question by the Deployment Liaison SharePoint Site Question identification number. This is useful when you want to view or edit a specific question, but you only have the old SP Site question number.  
*Note:* Questions were moved from the Deployment Liaison SharePoint Question and Answer site in February 2011. During the migration of the data some questions were renumbered. This search allows you to search by the prior DL SharePoint site question number. |
| **NEW Questions by Date** | Displays the questions with the status NEW received within the date range provided.  
When you select this report a pop up window asks you to enter the start and end dates.  
*Notes:*  
- *NEW status indicates the question has been entered into the database, but not yet assigned to a Point of Contact.*  
- *The date format must be entered in mm/dd/yyyy. For example, 02/14/2011.* |
| **OPEN Questions by Date** | Displays the questions with the status OPEN/ASSIGNED received within the date range provided.  
When you select this report a pop up window asks you to enter the start and end dates.  
*Notes:*  
- *OPEN/ASSIGNED status indicates the question has been entered into the database and assigned to a Point of Contac, but the answer is not yet finalized (and/or approved if required).*  
- *The date format must be entered in mm/dd/yyyy. For example, 02/14/2011.* |
<table>
<thead>
<tr>
<th>OPTION/BUTTON</th>
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</tr>
</thead>
</table>
| ANS/CLOSED Questions by Date      | Displays the questions with the statuses ANSWERED, ANS/NEEDS APPR, or CLOSED/COMMUNICATED received within the date range provided. When you select this report a pop up window asks you to enter the start and end dates. Notes:  
  • ANSWERED status indicates the question has been answered by a Point of Contact working with the appropriate Subject Matter Expert.  
  • ANS/NEEDSAPPR status indicates the question has been answered by a Point of Contact working with the appropriate Subject Matter Expert, but it still Needs Approval from Project Leadership. The Communications Manager facilitates this process.  
  • CLOSED/COMMUNICATED status indicates the answer to the question has been communicated back to the person/department asking the question.  
  • The date format must be entered in mm/dd/yyyy. For example, 02/14/2011.                                                                                                                                                                                                                                                                                                                                                       |
<p>| Frequently Asked Questions        | Displays the Frequently Asked Questions in a report. FAQ is determined by a checkbox which can be selected by the Point of Contact, Subject Matter Expert, Communications Manager, etc. Anyone who has authority to edit the question details. The Communications Manager will determine where the FAQs are posted and how often. Note: Since this is a report, it can be printed to PDF and posted on any website, shared with departments, etc.                                                                                                                                                                                                                                                                                                         |
| Search for a Question             | Search the Q and A database to see if a new question that has come up has already been answered. You can search by Key Word(s), a specific Question ID # if you have it, or by Business Area (Time, Payroll, etc). Note: This includes questions from all statuses (New, Open, Answered, Closed, etc) so you can see if your question has already been entered and, if so, what status it is in.                                                                                                                                                                                                                                                                       |</p>
<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Add a New Question</td>
<td>Allows you to add a new question to the database.</td>
</tr>
<tr>
<td></td>
<td><strong>Notes:</strong></td>
</tr>
<tr>
<td></td>
<td>• You must first search to see if the question has already been answered.</td>
</tr>
<tr>
<td></td>
<td>• Complete as much information as you have, but don’t worry about Bus Area,</td>
</tr>
<tr>
<td></td>
<td>Priority, or Assign to if you don’t have that information. This will be</td>
</tr>
<tr>
<td></td>
<td>completed by the POC or the Communications Manager.</td>
</tr>
<tr>
<td></td>
<td>• If your name is not on the Question Submitted By: dropdown list, contact</td>
</tr>
<tr>
<td></td>
<td>Mari Riddle, 376-8622.</td>
</tr>
</tbody>
</table>

If you do not see the information you need, please contact the Communications Manager, Mari Riddle, 376-8622. For additional assistance see the **Support** section located at the end of this document.

**Printing Reports**

All reports can be printed or converted to PDF (required Adobe or Cute PDF Writer):

1. Run the appropriate report.  
   **Note:** See appropriate sections above to run reports as Deployment Liaisons: or Point of Contacts:

2. Select the ![Office button](image) located in the upper left corner of the report window.

3. Select ![Print](image) (Print) from the Office menu bar. The Print window displays:

   ![Print window](image)

4. Select **Adobe PDF Writer** or **CutePDF Writer** from the Name: dropdown list.  
   **Note:** You must have either Adobe or Cute PDF Writer on your machine to print to PDF. If you do not see this option, contact your Technical Support.
5. Click the **OK** button to save the report as a PDF file. The **Save As** window displays:

![Save As window](image)

**Figure 13: Save As window**

6. Use the **Save in:** dropdown list to specify where you wish to save the PDF file.  
   **Note:** You can also change the default file name in the **File name:** field.

7. Click the **Save** button to save the PDF file to the location you specified in Step 6.

8. The PDF file is now ready to place on a website, send in an email, etc.

**Support**

- For assistance with the database functionality please contact the database administrator:  
  Jeannie LeTourneau (916/373-3710)

- For assistance or questions with the database process, questions, access to the database, etc. contact the Communications Manager, Mari Riddle (916/376-8622)