The following Agency Readiness checklist is for those agencies that will go-live with SCEIS Finance (FI) and Materials Management (MM) functions on May 3, 2010 (Phase 4). These agencies are listed in the table below.

Agency Name	Agency Number	Advocate	Inventory Management	Sales & Distribution
Corrections, Dept of	N04	Eric Jordan	Yes	Yes
Health and Environmental Control, Dept of	J04	Elizabeth Cureton	Yes	
Social Services, Dept of	L04	Elizabeth Ellison		
Transportation, Dept of	U12	Eric Jordan		

The following Agency Readiness Checklist describes activities an agency needs to complete in the final four months of their implementation efforts. These activities will be discussed on a monthly basis with Agency Support Team (AST) Leads and are *subject to change based on SCEIS project planning activities*. Additional tools and information to support the completion of these activities will be provided as needed.

In addition to this checklist, readiness reports and other monitoring tools will be available to assist agencies in ensuring their tasks are being completed. Individual tasks will be monitored monthly by your assigned SCEIS Agency Advocate and entered into a Share Point tracking tool. The readiness report will be produced monthly and forwarded to the AST Lead for review. After the AST Lead has had one week to review and respond, the report will be forwarded to the AST Sponsor.

This information will assist both the agencies and SCEIS in identifying any delays in agency readiness activities. This is important so that a revised plan may be developed to meet the ultimate goal of implementation according to the established dates.

January 2010					
#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
1	Attend FI master data meetings	Agency Subject Matter Experts (SMEs) attend sessions with SCEIS finance team members to discuss master data elements such as Fund, Functional Area and Cost Center	FI	AST SMEs attend sessions and complete data-gathering activities	Completed worksheets that contain financial master data objects, such as agency cost centers	• PowerPoint presentations • Excel spreadsheets and instructions; • Meeting discussion
2	Discuss current purchasing & requisition approval process; begin to identify Supplier Relationship Management (SRM) roles and workflow requirements	Agency attends scheduled meetings to discuss electronic routing of shopping cart to appropriate staff	MM	• Agency MM Subject Matter Experts (SMEs) • AST Lead, as needed	Agency SMEs attend meeting and provide requested data by established deadline	Excel spreadsheet
3	As appropriate, conduct Inventory Management (IM) & Sales & Distribution (SD) workshops; conduct role mapping in these areas	Agency attends scheduled meetings to discuss IM and SD business process, requirements, and roles	MM – IM MM – SD	• Agency IM & SD Subject Matter Experts (SMEs) • AST Lead, as needed	Agency SMEs attend meeting and provide requested data by established deadline	Excel spreadsheet
4	Complete interface requirements	Agency outlines legacy systems that require an interface to SCEIS; a full analysis must be completed to avoid the accidental omission of key interfaces requiring modifications	Tech FI MM HR PR	AST Technical Lead works with SMEs (and AST Lead if necessary) to identify & provide requirements to SCEIS	Interface chart and template returned to SCEIS by due date	• Interface strategy • Landscape of systems
5	Continue legacy application modifications for interface to SCEIS	Agencies begin to prepare legacy systems for interface to and/or from SCEIS	Tech	• AST Technical Lead • Agency FI and MM SMEs as needed	Agency confirmation that development has begun	• Interface strategy • Landscape of systems

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	January 2010					
#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
6	Attend role mapping sessions and initiate assignment of SCEIS roles to employees for Finance and Procurement	Agency's AST Workforce Transition lead works with SMEs to assign SCEIS security roles to employees.	FI MM IM SD	• WFT Lead • AST Lead, as needed • SMEs	Agency completes and provides role mapping spreadsheet that includes assignment of SCEIS roles to core users	• Organizational Impact Asssessment Reports • Role Descriptions • Role mapping spreadsheet & instructions
7	Complete Organizational Impact Assessment worksheet and identify agency-specific training requirements. Conduct training activities, as needed	Agencies may require unique training to prepare users adequately for SCEIS training and to address agency-specific needs accurately. In these situations, it is the agency's responsibility to assess specific training needs and determine the training curriculum and support required.	EC&C Trng	Agency Training Coordinator and AST Lead, as needed	Agency-specific training is completed prior to the start of SCEIS training	

February 2010					
#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
1	Attend monthly AST Lead meeting	Attend and participate in EC&C sponsored meeting to discuss upcoming agency activities	FI MM	AST Lead attendance and FI/MM SMEs as needed	AST Leads attend meeting	PowerPoint presentation
2	Complete and validate agency role mapping for Finance and Procurement	Prior to beginning training registration, appropriate agency staff must validate that all SCEIS users are mapped to the appropriate SCEIS role or roles	EC&C	• WFT Lead • AST Lead, as needed • SMEs	Agency Sponsor sign-off on validation	Role mapping validation instructions
3	Continue legacy application modifications for interface to SCEIS	Agencies continue to prepare legacy systems for interface to and/or from SCEIS	Tech	• AST Technical Lead • Agency FI and MM SMEs as needed	Interfaces completed	• Interface strategy • Landscape of systems
4	Review proposed Procurement org structure; as needed discuss workflow	Agency attends scheduled meetings to discuss new org structure and data needed for conversion to SCEIS	MM FI	• Agency MM & FI SMEs • AST Lead, as needed	All necessary data is collected (current state, roles for workflow, etc.)	Excel spreadsheets
5	Discuss purchase orders, contracts, and data conversions guides	Agency attends scheduled meetings to review PO and Contracts Master Data Processes; discuss data needed for conversion to SCEIS	MM	• Agency MM SMEs • AST Lead, as needed	All necessary data is collected (current state, roles for workflow, etc.)	Excel spreadsheets
6	As needed, discuss Inventory Management (IM) to-be processes and data conversion guides	Agency attends scheduled meetings to discuss IM processes and data needed for conversion to SCEIS	MM – IM	• Agency IM SMEs • AST Lead, as needed	All necessary data is collected	Excel spreadsheet

Updated January 2010

February 2010						
#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
7	Conduct cost center security and workflow workshops	Discuss how workflow is enabled in the Finance modules, ensure the appropriate workflow roles have been assigned, and determine cost center security options in relation to workflow.	FI	• Agency FI SMEs • AST Lead, as needed	Decision regarding cost center security; all necessary data is collected	Excel spreadsheet
8	Conduct agency staff briefings in FI and MM departments	Agency leaders brief their staff on upcoming SCEIS activities to prepare users. Include one-on-one sessions (if applicable), role assignments, and training activities	FI and MM depart-ments	• AST Lead • AST Sponsor • Agency FI and MM leadership	Agency staff briefings in FI and MM departments are completed	• Manager Toolkit
9	Complete employee one-on-one discussions with FI and MM employees	Agency managers and supervisors meet individually with core users to discuss roles assigned and upcoming SCEIS activities	FI and MM depart-ments	• AST Lead • AST Sponsor • Agency FI and MM leadership	Discussions are completed	• Manager Toolkit • Individual Transition Plans
10	Complete registration for SCEIS FI and MM training	Core users enroll in SCEIS training through Blackboard Learning Management System	Trng	• Agency Training Coordinator • AST Lead	All agency core users enroll in appropriate training	SCEIS Training system quick reference guides/instructions
11	Begin FI/MM training	Users attend assigned training courses	FI MM	ATC and AST Lead	Users attend assigned training	Training tools and materials

Updated January 2010

#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
March 2010						
1	Attend monthly AST Lead meeting	Attend and participate in EC&C sponsored meeting to discuss upcoming agency activities	FI MM	AST Lead attendance and FI/MM SMEs as needed	AST Leads attend meeting	PowerPoint presentation
2	Attend FI and MM SCEIS training	Agency core users attend assigned SCEIS training	Trng	• Agency Training Coordinator • AST Lead • AST Sponsor	Users complete appropriate training	• Training registration • Training evaluations
3	Provide FI and MM transactional data for initial data load for testing	FI and MM "open" data such as general ledger balances and open purchase orders that need to be loaded into SCEIS prior to integration testing	FI MM	• Agency FI and MM SMEs • AST Lead, as needed	Provided data spreadsheets	• Excel spread-sheets • Instruc-tions
4	Begin to validate FI and MM converted data	Agency FI and MM SMEs confirm that account balances and other data are accurate in SCEIS, based on legacy data provided by agency	FI MM	Agency FI and MM SMEs	Agency ensures the appropriate staff has reviewed and approved all conversion results	Test results

Updated January 2010

#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
April 2010						
1	Attend monthly AST Lead meeting	Attend and participate in EC&C sponsored meeting to discuss upcoming agency activities	FI MM	AST Lead attendance and FI/MM SMEs as needed	AST Leads attend meeting	PowerPoint presentation
2	Complete legacy application modifications for interface to SCEIS	Agencies complete interface(s) to and/or from SCEIS and begin testing activities	Tech	• Technical Lead • Agency FI and MM SMEs as needed	Interfaces completed	• Interface strategy • Landscape of systems
3	Participate in organizational readiness activities for FI and MM	Provide information to FI and MM users regarding how to access SCEIS, how to get help, etc.	All	• AST Lead • Agency FI and MM SMEs	Agency distributes materials and completes activities	• SCEIS Help card
4	Provide FI and MM transactional data	FI and MM "open" data such as general ledger balances and open purchase orders that need to be loaded into SCEIS prior to go-live	FI MM	Agency FI and MM SMEs, AST Lead as needed	Provided data spreadsheets	• Excel spreadsheets • Instructions
5	Complete validation of FI and MM converted data	Agency FI and MM SMEs confirm that account balances and other data are accurate in SCEIS, based on legacy data provided by agency	FI MM	Agency FI and MM SMEs	Agency ensures the appropriate staff has reviewed and approved all conversion results	Test results
6	Complete FI and MM training	Agency core users attend and complete assigned SCEIS training	Trng	• Agency Training Coordinator • AST Lead • AST Sponsor	All core users in the agency have completed assigned training	Blackboard Reports
7	Support "freeze" period for FI and MM	Agency SMEs confirm that general ledger balances in SCEIS are accurate	FI MM	• AST Lead • Agency FI and MM SMEs • AST Sponsor	AST Lead confirms data	SCEIS reports as needed

April 2010						
#	Activity	Description	Area	AST Involvement	Completion Criteria	Tools
8	Complete agency cutover activities for FI and MM	Agencies are responsible for executing FI and MM cutover activities during the appropriate timeframes identified by the Cutover Plan.	Tech	• Technical Lead • AST Lead • AST Sponsor	The completion of this task signifies the transition from agency legacy systems to SCEIS	SCEIS Cutover plan

	May 2010					
#	**Activity**	**Description**	**Area**	**AST Involvement**	**Completion Criteria**	**Tools**
1	Contact Service Desk for FI and MM technical issues	Call the central service desk to resolve issues such as accessing SCEIS	All	• AST Lead • Communications Lead	N/A	
2	Support learning labs as needed for FI and MM	SCEIS team members work with agency FI & MM subject matter experts to support core users entering transactions	FI MM	AST Lead	Schedule support and lab	
3	Attend monthly AST Lead meeting	Attend and participate in EC&C sponsored meeting to discuss upcoming agency activities	HR PR	AST Lead attendance and HR/Payroll SMEs as needed	AST Leads attend meeting	PowerPoint presentation