

**ASSISTANT EXECUTIVE OFFICER MATRIX
INFORMATION TECHNOLOGY SERVICES BRANCH
June 18, 2013**

Board Assignment Status

Assign. Date	Request / Subject	Due Date	Status / Completed Date
Item of Interest		Status / Completed Date	
Pension and Health Services		<p>My CalPERS – The criteria for ensuring the completion of all original and authorized project scope were evaluated and Final System Acceptance occurred on April 11. Maintenance and Operations work, enhancements, and knowledge transfer continue. A my CalPERS Transition Roadmap was adopted in April to serve as a guide for continued enhancements for members, employers, and internal staff, as well as support CalPERS Business Plan initiatives. A forecast of these transition and support activities was developed in May and will be implemented in June.</p> <p>MSS – Preparations are on schedule for offering beneficiary designation online services beginning in August; this new self-service function will allow members to add and modify beneficiary and dependent information at their convenience. The team is working with Public Affairs to identify marketing strategies to members and employers beginning this summer regarding the range of self service offerings now available on line. These campaigns are expected to increase awareness and usage of my CalPERS and reduce reliance on Contact Center and operations staff over time.</p> <p>Contact Center Upgrade – With the completion of the Genesys framework (e.g., Phase I - Upgrade from version 7 to version 8 to provide new interactive voice reponse and implementation of the soft phone application in November 2012, and Phase II - Implementation of skilled based call routing and reporting in April 2013), future upgrade initiatives will be focused on enhanced functionality and operational efficiency at the Contact Center. Initial planning has started for the deployment of a customer flow management system in all of the CalPERS regional offices. In addition, requirements are being developed to streamline the current Interactive Voice Response (IVR) system and provide added CalPERS member self-serve capability.</p> <p>VoIP Update – ITSB started the phased implementation of VoIP on the 3rd Floor of the Lincoln Plaza West Building in May in conjunction with the cubicle re-stack project. Approximately 300 VoIP phones will be rolled out on the 3rd Floor in phases through September.</p>	

<p>CalPERS Business Intelligence</p>	<p>During the 2011-2012 Fiscal Year, CalPERS successfully executed a project that built an enterprise Business Intelligence program. As part of this accomplishment, CalPERS developed a roadmap that guides actions in the coming years. Now that the Business Intelligence program is established, it intends to support needs across CalPERS enterprise, however during the 2012-2013 Fiscal Year, we are primarily supporting CalPERS Business Plan Objective 7.6.</p> <p>CalPERS 2012-2014 Business Plan Objective 7.6 (originally 2.1.B) – The Objective 7.6 project team identified three tactical objectives and one strategic objective by prioritizing requests submitted by the partnered business divisions (Benefits Services, Customer Account Services, and Customer Service & Outreach). The objectives are defined as follows:</p> <ul style="list-style-type: none"> • Strategic Objective – Member Life Cycle Interactions: A complete view of member interactions during the benefit accumulation and distribution phases to forecast and trend key performance indicators across various member demographics. (Delivery: 4th Quarter) • Tactical Objective 1 – Workflow Analytics: An operational/historical view into workflow levels for process improvement, efficiency, and trend analysis. (Delivery: 3rd Quarter) • Tactical Objective 2 – Customer Contact Analytics: Business insight into common customer inquiries across various communication channels. (Delivery: 3rd Quarter) • Tactical Objective 3 – Member Analytics: An in-depth analysis of member characteristics over time to establish historical patterns and forecast future trends. (Delivery: 3rd Quarter) <p>Objective Progress – After delivering initial analytical capabilities and reports for the tactical objectives defined above during the 3rd quarter, the 7.6 team has moved on to enhancing the delivered reports and delivering the Strategic Objective. The team has gathered requirements for the enhanced reports and is currently working on implementing the enhancements per identified priorities. In addition, the team is currently developing the dashboard that addresses the Strategic Objective. Delivery will occur by June 30th.</p> <p>CalPERS Business Program Support – Separate from the Business Objective work, the Business Intelligence program continues to support key business needs by responding to daily incoming requests.</p>
<p>Enterprise Resource Planning (Financials, Human Resources, Procurement, etc.)</p>	<p>PeopleSoft Time & Labor Implementation – This initiative is designed to move towards more efficient and effective operations within Human Resources by implementing the Time and Labor HCM module which will allow the paperless automation of monthly timesheet creation, submission, review and approval. The Time & Labor implementation will be completed in three phases: Phase 1 will roll-out to a pilot group of users in April 2013; Phase 2 will follow the initial pilot with a focus on stabilization accomplished through iterative releases; Phase 3 will roll-out to the remaining enterprise in November 2013. The Pilot launched to approximately 180 users on April 22 as planned. An additional 93 users will submit time sheets using the automated system for the May pay period. The team has identified and fixed a number of defects and is working to coordinate expansion of the pilot group incrementally over the next several months.</p> <p>PeopleSoft Financials 9.1 Upgrade – The project team successfully implemented PeopleSoft Financials’ 9.1 into production and its integration with my CalPERS. 100% of the defects were fixed and the FISCAL check printing process was modernized and reconfigured to use CalPERS current security technology. Project closeout activities have started, which include conducting lessons learned sessions with the project team.</p>

Enterprise Content Management	Enterprise Content Management Program development is underway following the completion of Phase 1 activities last quarter. Development of the ECM Roadmap continues with the immediate focus on creating an enhanced governance model to support the future state of ECM, including collaboration, content publishing and social strategy. Planning for Phase 2 continues with kickoff activities including training, content evaluation and migration for the next cycle of divisions beginning early next fiscal year. An upgrade to SharePoint 2013 is planned for the first quarter of FY 13/14.
IT Security Roadmap	<p>The Security Roadmap Program (SRP) is an ongoing multi-year effort that will ensure CalPERS technology remains secure against the constantly changing landscape of threats. This Program includes prioritized yearly initiatives and deliverables focused on implementing the latest preventative measures.</p> <p>The initial phase (Phase 1) of the SRP is underway and includes risk mitigations that improve several aspects of CalPERS information security infrastructure. Specifically, CalPERS security policies will be updated to address the most current knowledge on how to protect organizations. CalPERS will improve the ability to secure and manage mobile devices (tablet computers, smartphones, etc). CalPERS will complete the changes necessary to be in compliance with federal computer standards for desktop computers. Technology will be enhanced to prevent the introduction of malicious programs that could infect CalPERS computer systems as well as solutions to prevent against sensitive/secure/private data getting into the wrong hands. The projected cost of Phase 1 is \$4.8M.</p> <p>In May, the team completed the installation of the second set of security patches to the CalPERS desktop environment and will begin the final set of patches in early June. We are wrapping up our work on the new security technologies for managing malicious mobile code, data loss prevention and mobile device management in test environments. We are working diligently to ensure the implementation of our information security enhancements have no impact to CalPERS ability to accomplish its work.</p> <p>The projected cost of Phase 2 is \$5.5M. This cost includes continuing two Phase 1 efforts, Data Loss Prevention, and Identity Management, both critical to keeping our member's sensitive data secure.</p>
Disaster Resiliency	<p>Disaster Recovery – CalPERS conducted a 96-hour disaster recovery test at the Sungard Data Center during the week of May 12th. The exercise addressed recovery and validation of key CalPERS infrastructure components including network, Active Directory, Domain Name Service, Dynamic Host Configuration Protocol and Lightweight Directory Access Protocol to enable users access to data and to CalPERS mission critical system including my CalPERS, file shares, etc. The TEAM was successful in restoring my CalPERS application servers. Over all, the TEAM was able to accomplish more in this test as compared to prior disaster recovery tests. A postmortem meeting has been scheduled for June 6th to discuss lessons learned and ways to achieve new milestones in the next test.</p>