

Enterprise Content Management (ECM) Replacement Project

March 24, 2022
ETF Board Presentation

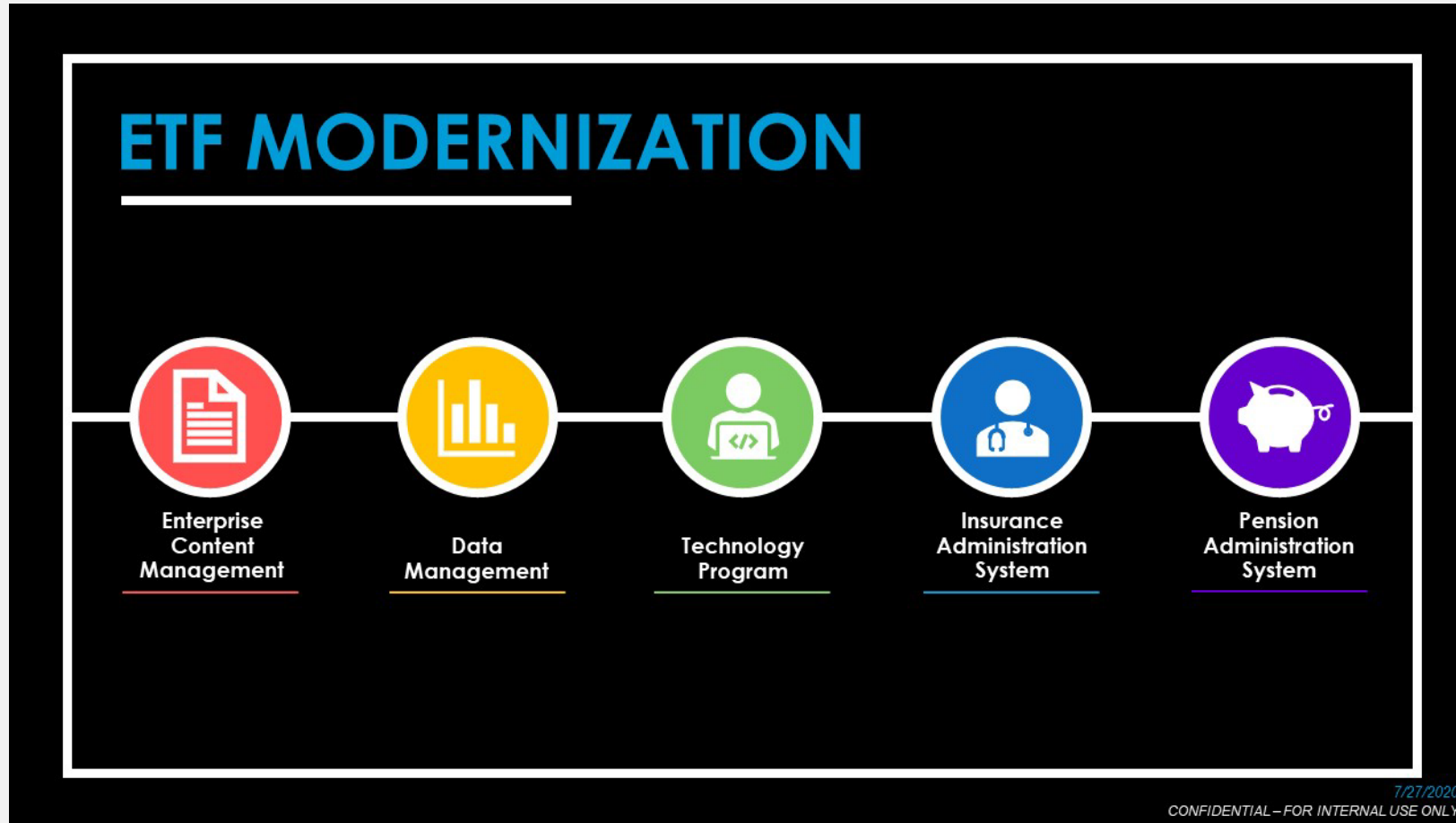
Bonnie Cyganek, Deputy Administrator, Division of Management Services

Nate Johnson, Business Analyst, Office of Enterprise Initiatives

Anne Boudreau, Deputy Administrator, Division of Retirement Services



ETF Modernization Roadmap



Enterprise Content Management Replacement Project

- Project planning meetings started September 2019
- Went live on November 22, 2021

OnBase[®]
by Hyland

ETF Cross-Functional Team

Naviant, Inc., System Implementer

Project Update

Nate Johnson

Project Overview

Enterprise Content Management (ECM) includes:

- The functions that capture, store, retrieve, share, manage and integrate **information**
- **Workflow** creation and management
- Migration of more than 20 million images from the previous system

OnBase[®]
by Hyland

Collaboration with Vendors



- OnBase (From Hyland) Enterprise Content Management system

- Benefits of OnBase:

- Already in use at several Wisconsin agencies
- Designed for imaging, content management and workflows
- Industry leader



- Naviant

- Preferred OnBase system implementor for the State of Wisconsin
- Local to Wisconsin

Collaboration with ETF Staff

Worked with more than 70 staff members across the agency in all facets of the project, including, but not limited to:

- Contract Negotiation
- Solution Design and Configuration
- Migration Development
- Interface Development
- Testing
- Training and Work Process Updates

Preparing to Use OnBase

- Attendees included ETF staff and employees of the third-party administrators Securian and The Hartford
- All training provided remotely



OnBase Training Sessions

- 101 Sessions – 16 Sessions – (220 Trainees)
- Case Management Sessions – 12 Sessions (176 Trainees)
- Document Research – 2 Sessions (51 Trainees)
- Dashboard Viewing – 3 Sessions (52 Trainees)
- Self Sufficiency – 1, Two-day Session (3 Trainees)
- Power User – 1 Session (11 Trainees)
- Overview for BITS Staff – 2 Sessions (25 Trainees)

Post-training survey reported: 91% of OnBase 101 training attendees who will use OnBase are looking forward to it.

Operational Benefits of OnBase

Anne Boudreau

OnBase Features & Benefits



- Users add content directly

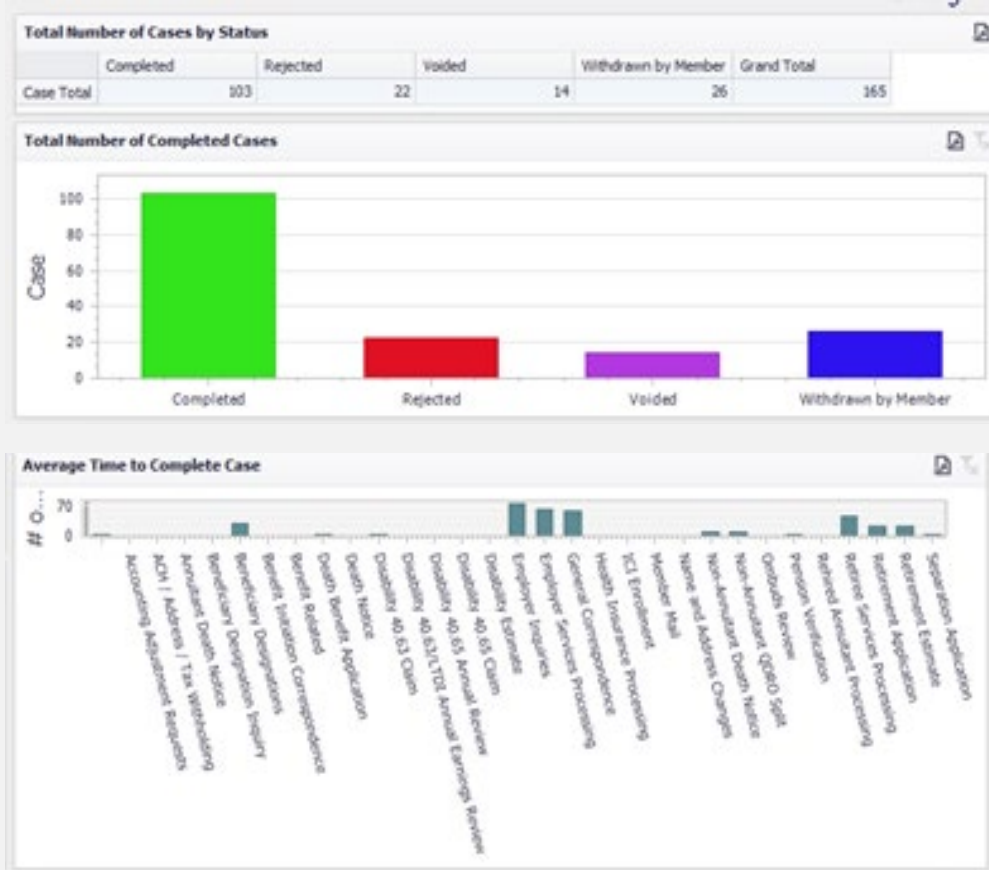
Instructions Logout Call & Service System (CallSS)

Accounts	Reports	FRED
Non-Annuitants	Display Save Clear Alpha Search SkipComm	
BPS	SSN <input type="text"/>	Member ID <input type="text"/> Comments
myETF Benefits	Name: <input type="text"/>	Birthdate: (Age:) Status:
Workflow Search	Daytime Phone <input type="text"/>	Mobile Phone <input type="text"/> Account Type:
OnBase Pop	Email Address <input type="text"/>	<input type="checkbox"/> Remove annuitants from WRS newsletter
	Enter new email: <input type="text"/>	
Communication Convert New Help		
<input checked="" type="checkbox"/>	*Start Date	*Inquiry Subject *Status *Contact Is Participant *Contact Last Name *Contact First Name Interaction Type Com

- Open OnBase from ETF web apps

OnBase Features & Benefits (continued)

- Dashboards for metrics



- Captures system-generated content

Department of Employee Trust Funds
Wisconsin Retirement System
P. O. Box 7931 - Madison, WI 53707-7931

RETIREMENT BENEFIT ESTIMATES AND APPLICATION
Wis. Stat. §§ 40.23, 40.24, 40.25; 42.49, 42.242 (7), 1979 Stats.

PLEASE COMPLETE IN BLACK OR BLUE INK

ET-4301

Name	HERMAN MUNSTER	Birthdate	10/31/1600	Social Security Number	000-00-1031 P01 001
Address	1313 MOCKINGBIRD LN MOCKING BIRD HEIGHTS WI 13131-3131				
Date of Estimate	10/31/2019	Effective Date of Annuity	10/31/2020	Your Age on Effective Date	
Normal Retirement Age	65	Benefit Calculation Type	FORMULA	Formula Factor(s) Used in Your Estimates	
				.01765	.01600

If information above is incorrect, please make corrections.

SERVICE AND EARNINGS				MILITARY SERVICE ONLY		
SERVICE YEARS BY CATEGORY, INCLUDING MILITARY SERVICE						
Employment Category	Before 2000	After 1999	Total Years for Category	Before 2000	After 1999	Total Years of Military Service
	5.00	19.75	24.75			

OnBase and Customer Experience

Faster and more efficient scanning and indexing of documents means that ETF staff will always have access to more real-time and complete records.



Questions?

Thank you



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ETF E-mail Updates



608-266-3285
1-877-533-5020