

APPENDIX "A"

TECHNOLOGY REPORT

In October 2002, CUPE's National Executive Board adopted an Information Technology (IT) Strategic Plan as the blueprint for future IT initiatives and expenditures. The plan was the first of its kind for CUPE and was created to ensure that value was received from technology spending. The plan contains project expenditures and organizational restructuring to be phased in and reviewed every year. This report represents the first annual review.

The IT plan identified four key directives:

- Identify lower-cost alternatives to the existing Oracle systems
- Ensure that IT spending is of direct value to members
- Provide staff and locals with critical collective agreement information
- Improve CUPE's membership database system.

The plan identified nine key objectives for 2002-2003. Here is the status of these nine goals:

1. **To establish an ongoing strategic planning process.** This process has been established.
2. **To establish an IT Steering Committee to provide direction on policy, priorities and standards.** The Committee is established and meets on a regular basis.
3. **To develop policies and procedures to ensure IT structure and system development is consistent with overall CUPE policies.** Policies and procedures continue to flow out of and under the direction of the Steering Committee.
4. **To establish a competitive purchasing policy for all major IT purchases.** Established and in use. A new financial software package, new website and new data communication purchases are examples of major purchases that have adhered to this policy.
5. **To develop the Collective Agreement Information System (CAIS) and the Local Union Information System (LUIS) in an integrated manner.** The design and development of LUIS is based on the premise of a data repository where LUIS contains the primary key data based on the collective agreement of many local unions. The LUIS system is running live at National.

6. **Select and begin implementing a new mid-range financial and administration system to replace the existing Oracle financials.**
The Solomon financials product was identified as the mid-range replacement financial application. Three bids were obtained from separate suppliers and presented to the National Executive Board with a recommendation that the proposal from Cansys Inc. of Toronto be accepted. The Board agreed and the product was purchased. The new financial system will be in live production for the start of 2004.
7. **Develop new CUPE Website.** Development of CUPE's new website was completed in early spring.
8. **Conversion of IT contractors to CUPE employees wherever possible.**
The number of contractors has been significantly reduced from a high of 12 in December of 2001 to 2.5 positions. Through a combination of restructuring and re-evaluation of IT priorities, four of the contractors were converted to staff while the rest became redundant or were merged into the 2.5 remaining contract positions.
9. **Begin assessment of the project for expanded web services for CUPE membership.** Although CUPE's new website infrastructure allows for webpage hosting, so far there has been only a cursory analysis of further expanded web services for the membership.

SPECIFIC PROJECTS:

The 2002 Strategic Plan described specific projects with associated costs and timelines. These projects were broken down into four broad categories:

- A) Organizational projects
- B) Infrastructure projects
- C) Internet projects and
- D) Support for legacy systems (i.e. Oracle)

Here's the status of projects planned to begin in 2002 and 2003. Note that not all of the projects are scheduled to be completed in 2003.

A) Organizational Projects:

- **Job Evaluation System Development.** This system has been developed and deployed to Job Evaluation staff.

- **Financials & Human Resources Management System (HRMS) replacement systems selection.**
 - The financials system selection and purchase of Solomon were completed in early 2003.
 - The HRMS system selection has been delayed pending the results of a systems requirements study performed by The Exchange Group. This extra step in the Human Resources (HR) selection process arose out of a demonstration of the Great Plains HR system and subsequent meetings with senior staff regarding the impact of implementing an integrated HR/Payroll system.
 - The system requirements study was delivered in early September.
- **Local Union Information System (LUIS) Development.** The Local Union Information System (LUIS) is running in parallel with the old systems at National. After a period of parallel running with the new systems at National, the Local Union Information System will be made available to CUPE Regional offices.
- **Collective Agreement Information System (CAIS)**
 - As this product relies on the LUIS database for the local union data to which collective agreement information is tied, and given that the same resources are used for both projects, significant progress on this project could not begin until the LUIS database was nearing completion. With LUIS being brought into production in September the development focus has shifted to the CAIS project.
 - To meet the overall budget for system developers, significant progress must be made in CAIS by year-end. We are in the process of evaluating whether or not to hire an additional contract developer to assist with CAIS from September to the end of the year. Budget surpluses from other technology spending, such as the Oracle database administrator budget, may be used to fund the extra developer.
- **Contract Collection for Electronic Storage.** This project will soon be initiated.
- **General Ledger and Accounts Payable Implementation.** We are targeting January 2004 for the changeover to Solomon because it would cause problems with the audit if we were to change systems during the fiscal year.

- **Per Capita – Accounts Receivable Implementation.** This project cannot start until the General Ledger and Accounts Receivable implementation is complete. This is scheduled for January 2004.
- **HRMS Implementation.** As indicated in the executive summary, the system selection has been delayed pending completion of the requirements analysis by the Exchange Group. The completed system requirements document is now being reviewed by senior CUPE staff.
- **Convention System.** It was decided to improve the existing application and delay rewriting until after this year's Convention. The existing code was moved into a web-enabled architecture that allows real time information to be available over the Web. The end result is better performance and a more stable environment. As of the end of August, the system is functioning well, with very minor technical support.
- **Inventory/Asset Tracking System Development.** This will be initiated once we have the implementation of the new Accounts Payable application.

B) Infrastructure Projects:

A number of the projects listed under this category are on-going, such as evaluating user needs and standards, and replacing and maintaining equipment. In addition to the projects listed, Technology has renegotiated data services for our Wide Area Network (WAN) and local access, which will result in substantial monthly savings of approximately \$12,000.

- **Inventory Tracking System.** The computer inventory system for CUPE has been migrated to a web-enabled application. This system is now being used by Technology at National to identify, locate and track personal computers in CUPE. In time, this application will be available for inquiry purposes in the regions.
- **Helpdesk Tracking System.** The web-based product has been implemented and is being used to track technology service requests. Since August of last year, when the system went into production, over 1,600 calls have been logged on this system.
- **Novell Migration.** This project was to convert all of the Novell systems at CUPE to Microsoft NT based systems. Over the last year the project has advanced to be an upgrade to Windows 2000 server and expanded to include the replacement of all existing servers in the regions and the implementation of Active Directory.

Changes to staff and our original approach have enabled the project to be expanded in scope without expanding the budget. The implementation of Active Directory and Server 2000 will improve support and service to the regions at reduced costs.

To date the Ottawa Area Office and the National exchange server have been successfully converted as a pilot. All Regional Offices and other Area Offices with server will be converted beginning in October.

Of significant note, the Ottawa Area Office was the ONLY office spared in the most recent round of Virus infections. This protection was a result of the forced automatic updates to anti-virus software.

C) Internet Projects:

- **New CUPE Website.** The new CUPE Website project was completed in early May – on time and within budget. More than 50 CUPE locals are preparing to use the CUPE National website to host their local websites.
- **CUPE Intranet Development.** CUPE's intranet site has been up and running since the fall of 2002, offering information, links and downloads to CUPE staff across the country.

D) Support for Legacy Systems

- **Oracle Systems Support.** This support will be continued until such time as the existing Oracle systems have been replaced. We have scaled back and brought support in-house, significantly reducing the contractor costs associated with this service. We have also used the contractor resource for support and re-engineering of the Convention system. Even with the broadening of scope to include Convention support, as of end of June 2003 we are under budget year-to-date by roughly \$37,000 for the Oracle support budget.
- **Technical Support to Regions.** Working with the regions, we will be moving to address issues relating to providing technical support for hardware and software systems.

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