



## **Teachers Retirement System**

### **Agency Information Technology Performance Report 2017 Biennial Report**

**Please complete this report by close of business **October 25, 2016.****

**Please upload your final Performance Report and all applicable spreadsheets to your individual Agency folder in the Biennial Reporting SharePoint Site found at:**

[https://ent-sp1.mt.gov/sites/bienrpt/\\_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx](https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx).

MCA [2-17-521\(4\)](#) requires the Department of Administration to prepare a biennial report on Information Technology (IT) based on the Agency IT Plans and Performance Reports required under MCA [2-17-524](#).

This performance report evaluates progress made towards the objectives articulated in your 2014 Agency IT Plan, which can be found at:

[https://ent-sp1.mt.gov/sites/bienrpt/\\_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx](https://ent-sp1.mt.gov/sites/bienrpt/_layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx).

Please answer each section below based on your 2014 Agency IT Plan (*add lines to the tables as needed*).

**Section 1:** An evaluation of the Agency’s performance relating to IT (MCA [2-17-524\(3\)\(a\)](#)).

- Referencing the goals and objectives noted in Section 10 of your 2014 Agency IT plan, please fill in the table below with the information for each goal and objective.
  - 2014 Agency IT plans can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.
- Please provide an update on the efforts to implement your Agency 2014 IT goals and objectives. Your update may include how a goal/objective has advanced the Agency mission.

GOAL	OBJECTIVES	UPDATE
Continue Development of M-Trust.	Migrate from legacy pension management software system to modern web-based system.	Phase 2 of this project is scheduled to be completed prior to year-end 2016. All functionality of legacy pension management software system will have been migrated to the new M-Trust system at this time.
Continue Work on Improving Storage Capabilities.	Deploy remote storage for data backup and redundancy for disaster recovery purposes.	TRS purchased additional storage array for planned deployment to State of Montana Data Center – Miles City. Due to the new IT Convergence, per Executive Order 09-2016, TRS is migrating to a fully-hosted hardware environment that will provide disaster recovery as part of the Service Level Agreement.
Plan Migration of Electronic Records System.	Upgrade, update, improve legacy electronic document management system.	TRS had planned for a IBM FileNet upgrade during FY 17. Due to the IT Convergence, per Executive Order 09-2016, TRS will be migrating to the state enterprise Lexmark Perceptive Electronic Content Management system.
Improve Use of Virtualization.	Allow for centralized management of all workstations and servers.	TRS has become fully virtualized by third quarter FY 16 with the virtual environment running on three substantial enterprise-class physical servers. The virtual environment will be migrated from the TRS owned physical server to ITSD hosted hardware during third quarter FY 17.

**Section 2:** An assessment of progress made toward implementing the Agency IT Plan (MCA [2-17-524\(3\)\(b\)](#)).

- Please detail progress made toward completing IT projects identified under section 11 of your 2014 Agency IT Plan.
  - Your Agency plan can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.
- Please include project cost, schedule and completion information.

ITEM	DESCRIPTION	ACTUAL AS OF JUNE 30, 2016
Project Name	M-Trust	
Agency / Division	DOA TRS	
Project / Program purpose and objectives	Migration of legacy pension management system to modern technology architecture	
Estimated start date	October 2013	
Estimated cost	\$2.7 Million	
Funding source – 1	TRS Pension Trust Fund	
Funding source – 2		
Funding source – 3		
Annual costs upon completion		
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	90% complete as of June 30, 2016. \$2.06 million expended as of June 30, 2016	

ITEM	DESCRIPTION	ACTUAL AS OF JUNE 30, 2016
Project Name	Examine Alternatives to FileNet or Upgrade FileNet system	
Agency / Division	TRS	
Project / Program purpose and objectives	Montana TRS has a mature FileNet records management system used to store and retrieve electronic records. That system is due for an upgrade in the next three to five years, but TRS is aware of statewide efforts to identify efficient and effective ERM/ECM solutions for the State of Montana. The agency plans to monitor the state RFI and RFP process then decide on a plan to enhance records management for TRS.	
Estimated start date	Fourth quarter FY 2015	
Estimated cost	Undetermined	
Funding source – 1	TRS Pension Trust Fund	
Funding source – 2		
Funding source – 3		
Annual costs upon completion	Undetermined	
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	As part of the state of Montana IT Convergence, per Executive Order 09-2016, TRS will be migrating to the state's enterprise Lexmark Perceptive Electronic Content Management System. No funds have been expended as of June 30, 2016	

<b>ITEM</b>	<b>DESCRIPTION</b>	<b>ACTUAL AS OF JUNE 30, 2016</b>
Project Name	Upgrade Physical Servers in TRS Blade Center	
Agency / Division	TRS	
Project / Program purpose and objectives	The TRS blade center and blade servers, in conjunction with a SAN storage array, have proven to be a strong IT asset for the agency. The location in the data center provides for a controlled environment and access to state network resources. The blades in the blade center are almost five years old and in need of replacement. The new blades will provide additional computing power and memory for critical TRS systems	
Estimated start date	Third quarter FY 2015	
Estimated cost	\$29,000	
Funding source – 1	TRS Pension Trust Fund	
Funding source – 2		
Funding source – 3		
Annual costs upon completion	\$4000	
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	New blade servers were purchase in third quarter FY 2015. Total funds expended as of June 30, 2016 was \$24,016	

<b>ITEM</b>	<b>DESCRIPTION</b>	<b>ACTUAL AS OF JUNE 30, 2016</b>
Project Name	Upgrade VMWare to Latest Release	
Agency / Division	TRS	
Project / Program purpose and objectives	Montana TRS relies on VMware for its virtual environment for servers and desktops. This project will upgrade our virtual environment to the latest release of VMware.	
Estimated start date	Fourth quarter FY 2015	
Estimated cost	\$0	
Funding source – 1	TRS Pension Trust Fund	
Funding source – 2		
Funding source – 3		
Annual costs upon completion	\$0	
Status of the project as of June 30, 2016. Indicate % completed and status of funds expended.	Upgrade completed during fourth quarter FY 15.	

**Section 3:** An inventory of agency information services, equipment and proprietary software (MCA [2-17-524\(3\)\(c\)](#)).

To collect data on “information services” and “proprietary software”, we are leveraging LDRPS (L10). Our goal is to utilize and maintain LDRPS as the authoritative source for this information.

- Please verify the information in the LDRPS Spreadsheet, making any necessary updates or additions.
- Please email your updated spreadsheet to Dawn Pizzini, subject matter expert, at [dpizzini@mt.gov](mailto:dpizzini@mt.gov).
  - The LDRPS spreadsheet can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.
  - We will pull a final LDRPS Spreadsheet for submission as part of the Biennial Report based on your Agency’s input.

For “equipment”, we are utilizing the standard Agency Inventory Template Spreadsheet we have used for past biennial reporting and that we are currently using to gather information for the IT Convergence project. The spreadsheet can be found in your Agency folder located at <https://ent-sp1.mt.gov/sites/bienrpt/layouts/15/start.aspx#/Agency%20Information/Forms/AllItems.aspx>.

- If you **have** already provided your inventory for the IT Convergence project, please fill out the last tab labeled **DEVICES**.
  - Please review the entire workbook for accuracy and make any necessary changes.
- If you **have not** provided this inventory, please fill out the entire workbook.

Questions can be directed to:

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***Please complete this report by close of business October 25, 2016.***

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