

# Project Closeout Report

Presented to the IT Committee August, 2010

**Project Name:** **Business Intelligence PeopleSoft Project**

**Agency:** **Office of Management and Budget**

**Business Unit/Program Area:** **Finance and Human Capital Management divisions within State Agencies**

**Project Sponsor:** **Chuck Lang (OMB)**

**Project Manager:** **John Wohl (ITD)**

Objectives		
Project Objectives	Measurements	
	Met/ Not Met	Description
<b>Objective 1:</b> <ul style="list-style-type: none"> <li>Identify Business reporting requirements regarding the use of PeopleSoft Financial and Human Capital management data used within the Business Intelligence reporting solution.</li> </ul>	Met	<b>Measurement 1:</b> <ul style="list-style-type: none"> <li>Complete project assessment sessions and create a detailed list of reports representing business requirements. <i>Response: Completed Assessment sessions as outlined in contract.</i></li> </ul>
<b>Objective 2:</b> <ul style="list-style-type: none"> <li>Provide a user friendly tool enabling End users without IT experience with the ability to access PeopleSoft HCM and Financial data and create reports above what the Psft transactional system could provide.</li> </ul>	Met	<b>Measurement 2:</b> <ul style="list-style-type: none"> <li>2.1 Supply a reporting environment with user friendly tools enabling end users ability to produce reports. <u>Yes</u>/No. <i>Response: Project team completed an in scope report list</i></li> <li>2.2 Conduct end user survey identifying if the reporting solution meets their needs. (Post Project survey) <i>Response: Business/Functional team response indicating the Cognos solution met their expectations.</i></li> </ul>
<b>Objective 3:</b> <ul style="list-style-type: none"> <li>The tool should be intuitive for Business/Functional users to create queries, reports and distribute reports</li> </ul>	Met	<b>Measurement 3:</b> <ul style="list-style-type: none"> <li>Follow industry best practices with developing Cognos reports. Conduct end user acceptance testing of prototypes to ensure end user needs are met. <i>Response: User acceptance testing approved results</i></li> </ul>
<b>Objective 4:</b> <ul style="list-style-type: none"> <li>Expand the number of users accessing and receiving PeopleSoft HCM and Financial reports.</li> </ul>	Met	<b>Measurement 4:</b> <ul style="list-style-type: none"> <li>Enable access to Agency Managers, Supervisors and IT Coordinators which need the capability of publishing info. (ie; Report distribution, Bursting, Portal integration). Establish the current number of agency manager, supervisor and IT Coordinators which access info. prior to the project and determine count after the project concludes. <i>Response: Cognos application security enables Agency user to distribute access to any agency user. OMB &amp; ITD Security created security structure. ie; DHS &amp; DOT were example agencies of a layered security implementation scheme.</i></li> </ul>
<b>Objective 5:</b> <ul style="list-style-type: none"> <li>5.1 Ability for management to monitor Key Performance Indicators (metric) for HR and FIN.</li> </ul>	Met	<b>Measurement 5:</b> <ul style="list-style-type: none"> <li>5.1 Build functionality matrix and measure the function has been built. <u>Yes</u>/No. <i>Response: Drill downs, cube access and reports were outlined within</i></li> </ul>

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<ul style="list-style-type: none"> <li>5.2 Ability to drilling into the details of these KPI's</li> </ul>		<p><i>a functionality matrix</i></p> <ul style="list-style-type: none"> <li>5.2 Functionality is provided. <input checked="" type="checkbox"/> Yes/No</li> </ul>
<b>Objective 6:</b> <ul style="list-style-type: none"> <li>The solution should provide predefined reports and ability to run on demand</li> </ul>	Met	<b>Measurement 6:</b> <ul style="list-style-type: none"> <li>Build functionality matrix and measure the function has been built. <input checked="" type="checkbox"/> Yes/No. Perform detailed report specifications during assessment sessions and outline reports required. Part of SOW #1 deliverable</li> </ul>
<b>Objective 7:</b> <ul style="list-style-type: none"> <li>Agencies require the ability to access reports throughout a Month, Fiscal year, Biennium and at times a previous Biennium. Currently the PeopleSoft reports are limited to storing reports for 90 days. The BI/DW solution will need to accommodate the duration and access to reports which fit agency needs.</li> </ul>	Met	<b>Measurement 7:</b> <ul style="list-style-type: none"> <li>Build functionality matrix and measure the function has been built. <input checked="" type="checkbox"/> Yes/No.</li> </ul>
<b>Objective 8:</b> <ul style="list-style-type: none"> <li>While end users build reports the data pulled into queries needs to be easily identifiable/recognized from a Business/Functional perspective</li> </ul>	Met	<b>Measurement 8:</b> <ul style="list-style-type: none"> <li>8.1 Build functionality matrix and measure the function has been built. Yes/No.</li> <li>8.2 Develop data labeling and reporting standards. Measure quality and effectiveness during iteration testing and end user acceptance testing.</li> </ul>
<b>Objective 9:</b> <ul style="list-style-type: none"> <li>Run adhoc reports without impacting production transactional system (Reports run on demand)</li> </ul>	Met	<b>Measurement 9:</b> <ul style="list-style-type: none"> <li>9.1 Perform Load tests and measure responses during system iteration testing. Gain sign off from Sys Admin and Tech Arch regarding performance.</li> <li>9.2 Following implementation; build compuware performance reports (if product supports Cognos) New Product-Zenos will be set up as the products functionality is deployed at ITD.</li> <li>9.3 Survey users on response time. <input checked="" type="checkbox"/> Yes/No.</li> </ul>
<b>Objective 10:</b> <ul style="list-style-type: none"> <li>Reduce the number of Shadow systems used for reporting, budgeting and forecasting.</li> </ul>	Not Met	<b>Measurement 10:</b> <ul style="list-style-type: none"> <li>10.1 Determine if Department of Human services deletes the Psft interface to the DHS access data base and reporting tools used today. The replacement of the DHS access database will extend beyond the term of this project. <i>Response: The DHS access database encompasses additional data elements outside of this project scope so the elimination of the database will take longer than this reporting period. The PeopleSoft data and associated security has been configured to deploy to DHS users.</i></li> <li>10.2 Identify system DOT uses and measure change of use. <input checked="" type="checkbox"/> Yes</li> </ul>
<b>Objective 11:</b> <ul style="list-style-type: none"> <li>Retain more years of data in the reporting system</li> </ul>	Met	<b>Measurement 11:</b> <ul style="list-style-type: none"> <li>Meet record retention requirements within the HCM and Fin reporting system.</li> <li><i>Response: Currently retrieves all data from PeopleSoft. PeopleSoft archiving project will outline further retention needs and will be applied to BI application. Also, BI is able to store reports past the 99 day duration available in PeopleSoft.</i></li> </ul>
<b>Objective 12:</b> <ul style="list-style-type: none"> <li>Provide an environment capable of expanding the user base beyond back office financial and HR staff to front line program managers</li> </ul>	Met	<b>Measurement 12:</b> <ul style="list-style-type: none"> <li>Technical requirement - Ensure application is designed to be scalable along with objective 4 measurement. <input checked="" type="checkbox"/> Yes/No</li> </ul>
<b>Objective 13:</b> <ul style="list-style-type: none"> <li>Provide an environment capable a</li> </ul>	Met	<b>Measurement 13:</b> <ul style="list-style-type: none"> <li>Technical requirement - Ensure application is designed so users are</li> </ul>

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means of publishing to the public.		able to publish to public facing applications. This project's scope does not include giving public access to run reports. ➤ (ND Public Reporting will leverage platform used in BI)
<b>Objective 14:</b> <ul style="list-style-type: none"> <li>Ability for IT to deploy and maintain; ease of building and deploying additional data marts.</li> </ul>	Met	<b>Measurement 14:</b> <ul style="list-style-type: none"> <li>Technical requirement – Ensure Tech developers and IT staff receive product training as well as knowledge transfer from Infolink Consulting.</li> <li>14.1 Build deliverable into the statement of work, project plan and project schedule.</li> </ul>
<b>Objective 15:</b> <ul style="list-style-type: none"> <li>Product must deliver High Availability.</li> </ul>	Met	<b>Measurement 15:</b> <ul style="list-style-type: none"> <li>15.1 Determine core business hours and maintenance window.</li> <li>15.2 Establish thresholds and measure unintended outages</li> </ul> <i>Response: Mirrors PeopleSoft Application support</i>
<b>Objective 16:</b> <ul style="list-style-type: none"> <li>Security standards must be met (authenticate and application level security)</li> </ul>	Met	<b>Measurement 16:</b> <ul style="list-style-type: none"> <li>16.1 Include ITD Security group in Assessment requirements gathering.</li> <li>16.2 Gain signoff from ITD Security group regarding application and system level security.</li> </ul>
<b>Objective 17:</b> <ul style="list-style-type: none"> <li>Provide regular and appropriate communication to the State agencies.</li> </ul>	Met	<b>Measurement 17:</b> <ul style="list-style-type: none"> <li>17.1 Build communication process within the project plan document.</li> <li>17.2 Application Managers will provide that list of agency stakeholders.</li> <li>17.3 Utilize a project management and collaboration tool</li> </ul>

### Schedule Objectives

Met/ Not Met	Original Baseline Schedule (in Months)	Final Baseline Schedule (in Months)	Actual Schedule (in Months)	Variance to Original Baseline	Variance to Final Baseline
<b>Met</b>	<b>March 2009 – Oct 2009 (8 months)</b>	<b>March 2009 – March 2010 (12 months)</b>	<b>12 months</b>	<b>(4 mo /8mo ) = 50% Over</b>	<b>(12 mo / 12mo) = 0%</b>

### Budget Objectives

Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
<b>Met</b>	<b>\$ 929,531.56</b>	<b>\$ 929,531.56</b>	<b>\$ 853,117</b>	<b>8.2% Under</b>	<b>8.2% Under</b>

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### Major Scope Changes

The scope was defined within the Statement of Work and Project Plan.

The technical scope increased to include a formal data stage as opposed to an operational data store. The scope change and schedule variance prompted a re-planning effort. The project team conducted a lesson learned/project evaluation session at the conclusion of the first deployment. The project incorporated the lessons learned and enhanced the project's schedule/tasks to include additional templates, QA measures and additional iterations of system testing. A project variance presentation was presented to the State's SITAC committee. The Project Steering committee approved the re-baseline and the contract with Infolink Consulting was completed at the conclusion of the second deployment (2 of 3 deployments). The State only team completed the final segment of the project's deployment.

### Lessons Learned

#### *Key Lessons Learned;*

- The Cognos platform and BI methodology was new to the State resulting in a larger than anticipated learning curve.
- The deployment required an iterative cube building approach
- A better user friendly tool needed for project team collaboration
- Additional time needed for building and acceptance review of deliverables
- Additional sponsor role needed for project decisions

#### *Recovery Strategy implemented;*

- The team recognized issues during the initial deployment.
- Conducted a lessons learned session and re-planning effort.
- Used Sharepoint as the collaboration tool
- Added Business Sponsor to the Organization chart
- Increased the schedule by allowing additional time for deliverables and deliverable reviews.
- Concluded Vendor contract following the second deployment (HCM). State only resources used for the remaining deployment.

### Success Stories

The Cognos cubes, drill downs and reports are well received by Business Groups. A key objective was to supply Financial and HR data in an easy to use format. This project enables users to view data in the business format which is useable and in an efficient manner. The BI solution also takes report processing pressure off of the production environments by running Statewide reports and adhoc queries on the BI system. The Business Group relayed they are "Very Happy" with the solution and foresee the upside potential on solving additional reporting needs. The BI solution is; fast, accurate and easy to learn and use.

The scope change to include a Data Stage rather than accessing the production database proved to be a benefit and is being leveraged in an additional project (ND Public Reporting project).