

# Project Closeout Report

## Presented to the IT Committee October 9, 2012

**Project Name:** PeopleSoft Environment Partitioning Project

**Agency:** OMB, ITD & NDUS

**Business Unit/Program Area:** HCM & Finance

**Project Sponsor:** Pam Sharp (OMB), Lisa Feldner(ITD), Randall Thursby(NDUS)

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

Objectives		
Project Objectives	Measurements	
	Met/ Not Met	Description
Objective #1: Improve the Ability to perform Application and Toolset upgrades within an acceptable Production outage window defined by Business groups.	Met	Measurements; <ul style="list-style-type: none"> <li>• <i>Previous FSCM application Production outage included downtime of Thursday 5:00 pm (May 8, 2008) through Wednesday 5:00 pm (May 14, 2008).</i></li> <li>• NDUS Financial Toolset upgrade was conducted July 14 &amp; 15<sup>th</sup>. Although a Toolset is a smaller event than an Application upgrade it demonstrated the shorter processing time. The outage window was one weekend (outside of business hours) and was an acceptable time frame.</li> </ul>
Objective #2: Nightly Application processes, Day time application processes including reports and queries	Met	Measurements; <ul style="list-style-type: none"> <li>• Nightly and Daily processes have all improved.</li> <li>• <u>State processes:</u> <ul style="list-style-type: none"> <li>○ Payroll calcs/confirm PG1 pay group in the past ran up to 120 minutes <i>now runs</i>; 45 minutes to 75 minutes.</li> <li>○ Financial daily runs approx. 1 hr (45 minutes to 1 hour time improvement than before PEPP)</li> </ul> </li> <li>• <u>NDUS processes:</u> <ul style="list-style-type: none"> <li>○ Off-cycle Calcs/Confirms are running 66% faster or better.</li> <li>○ On-cycle Calcs/Confirms are running approx 40% faster.</li> <li>○ Payroll/Financial Actuals is 66% faster.</li> <li>○ Most journal processes and budget checks are approx 50% faster.</li> </ul> </li> <li>• All processes can now be run without NDUS/State schedule conflicts</li> </ul>
Objective #3: Ability to deploy functionality and ability to configure unique Global configurations.	Met	Measurements; <ul style="list-style-type: none"> <li>• Outline list of functionality and modules awaiting consensus to be deployed. <ul style="list-style-type: none"> <li>○ State – Deployed PeopleSoft Talent Management to all State agencies following the PEPP Go Live</li> <li>○ State - Company Directory and Recruiting Solutions will greatly benefit from this project.</li> <li>○ NDUS – upgraded PeopleSoft Financial Toolset and applied Application patches.</li> </ul> </li> </ul>

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Objective #4: Decrease level of work effort for ConnectND project teams regarding Customer Service Requests, modifications and customizations. Specifically related to Business/Functional and Development ConnectND Teams.	Met	Measurements; <ul style="list-style-type: none"><li>CSR review and applying script to accommodate specific Business Units, Companies and other Enterprise level criteria (State/NDUS)<ul style="list-style-type: none"><li>The developers and business leads no longer are required to review each others development and/or global configurations.</li><li>Approximately 40 CSRs (Development Requets) are worked on and migrated each month. The CSR review has been eliminated.</li></ul></li></ul>			
Objective #5: Meet all critical Business Needs identified in the requirements matrix.ConnectND Management objectives	Met	Measurements; <ul style="list-style-type: none"><li>Measure results of Business Requirement matrix<ul style="list-style-type: none"><li>The critical business needs were satisfied along with the additional elements identified.</li></ul></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
Met	9.5	9.5	9.5	0	0
Go Live Dates; NDUS - March 3, 2012 (weekend of) STATE - March 10, 2012 (weekend of)					

<b>Budget Objectives</b>					
Met/ Not Met	Original Baseline Budget	Final Baseline Budget	Actual Costs	Variance to Original Baseline	Variance to Final Baseline
Met	\$500,000	\$500,000	\$440,683	-11.8%	-11.8%

<b>Major Scope Changes</b>
None

<b>Lessons Learned</b>
<ol style="list-style-type: none"> <li>End product was as expected, only minor issues associated with go-live that were quickly remedied.</li> <li>The outcome was better than expected due to the low number of post-production issues and their low severity</li> <li>There were some additions to the work load, which had a larger impact on effort than originally expected. (ELM, Portal)</li> <li>Project Team and Stakeholder communication was very effective</li> <li>Communication was very good throughout the project, both through regular meetings and documentation available on SharePoint</li> <li>The project Collaboration tool (Sharepoint) was extremely useful</li> <li>The issue log was used consistently throughout the project and items were updated as they were resolved</li> <li>The vendor database changes were contentious at times but in the end were managed effectively</li> <li>Expectations were communicated clearly and everyone performed their roles well</li> <li>Scheduling key project dates was difficult in having both project teams to agree on timelines</li> <li>Status meeting were very helpful on keeping people on task and on time. Overall all project team members did a great job!</li> <li>All things considered, it went very well. There were a few hiccups, but not bad for this type of project.</li> <li>There's still cleanup work to be done, but that would have complicated the project. It also remains to be seen how well the remaining shared development will continue to be shared.</li> <li>I think we kept HE informed reasonably well. We devised and helped the campuses understand the desired testing I think.</li> <li>A Collaboration tool was required for this project espespecially having members in several locations and varying</li> </ol>

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project needs. Some liked using the free Sharepoint version where others thought a more robust version or tool was necessary.

16. There were some lapses in understanding their project role or product knowledge which will need to be accounted for during the ongoing operational product support.
17. Project's significant issues; The EMPLID and Vendor subprojects. One was a non-event, the other wasn't as easy

### Success Stories

1. **The State and NDUS ConnectND project teams worked well together and did an excellent job on this project.**
  - a. **Everyone did a tremendous job** and was instrumental in the overall project success. I think each of the teams did their job well and remained cool, calm and collected during the project, and that helped ensure success. *(Many comments like this from the teams)*
  - b. Team members were very experienced from past projects.
  - c. Andrew Borden-King (ITD-State) and Michael Klemen (NDUS) did an outstanding job on using their experience with application upgrades on this initiative. The upgrade methodology they outlined proved to be essential for the data accuracy and success of deploying the applications.
2. **Improved Application performance:**
  - a. Daily and Nightly batch processes are **running faster** since the Go Live!
  - b. Payroll and Financial processing **no** longer have **scheduling conflicts**!
  - c. **Database sizes are manageable** and are able to be upgraded within an acceptable outage window!
3. **Improved Team performance;**
  - a. CSR (Development requests) no longer are required to be reviewed by each team saving Business/Functional and Development time per request. This **eliminated redundant work**.