SHARE
PeopleSoft 9.2 Upgrade Project
Closeout
April 25, 2018

Requesting Agency:
Department of Information Technology
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SHARE Director
Project Background

- The State’s Enterprise Resource Planning (ERP) system, SHARE, needed to be upgraded to the current version of PeopleSoft.
  - Current version provides new, more up-to-date, and robust functionality
  - Current version is fully supported by the vendor, and will be easier to maintain
  - The upgrade is an opportunity to streamline and standardize business processes, introduce efficiencies
  - The project will have a major focus on change management, training and communications
Project Objectives

- Both product suites, Human Capital Management (HCM) and Financial & Supply Chain Management (FSCM), were upgraded
  - HCM 9.2 implemented in April 2017
  - FIN 9.2 implemented in October 2017
- The project moved the State from Financials 8.8 and HCM 8.9 to release 9.2
- The upgrade included improvements to key processes and implemented new functionality
- A goal of the project is to remove customizations and standardize business processes across the state, aligned with industry practices

The SHARE Upgrade met the project goals and was completed on schedule and on budget.
Goals & Priorities of SHARE Upgrade

The SHARE upgrade goals remain relevant. We continue to build on the foundation for ongoing progress through each of these identified goals and priorities for SHARE:

**INCREASE STANDARDIZATION**
- Streamline business practices by eliminating customizations
- Automate key processes to increase efficiency
- Establish system as a “one stop shop” for data, reporting, and management needs

**INSTALL CONFIDENCE IN THE SYSTEM**
- Provide accessible and accurate data for users across agencies
- Maintain consistency and reliability for system operations and processing

**ENCourage COLLABORATIVE COMMUNITIES**
- Encourage open discussion about the system and the strategies it supports
- Create forums for active knowledge sharing among users and SMEs
- Provide targeted and informative communications about SHARE

**EMPOWER USERS**
- Deploy sustainable training programs that prepare users with the right knowledge and skills
- Enhance user interface to improve user-friendliness

Foundation for Ongoing Progress

- Coordinated and standardized business practices provide a common language for all agency users
- Sustainable training empowers users to make strategic decisions based on their knowledge system and its data
- Access to reliable and accurate data supports analytical decisions and transparent tracking and planning
- Collaborative user groups and agency partnerships encourage open communication and knowledge sharing about the system and its abilities
# SHARE 9.2 - Transformational Change

The upgrade was a major step forward in consistency and controls.

<table>
<thead>
<tr>
<th>FEATURE</th>
<th>DETAILS</th>
<th>BENEFITS</th>
</tr>
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<tbody>
<tr>
<td>Positive Time</td>
<td>Employees must now report all hours worked or on leave, rather than only exceptions to their scheduled hours. Positive time reporting improves accuracy and timeliness of payroll data.</td>
<td>• Significant advancement in accountability, transparency and financial control.</td>
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<tr>
<td>Reporting</td>
<td></td>
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<tr>
<td>Approval Workflow</td>
<td>An automated approval workflow now routes transactions, such as purchase orders and position changes, to the designated approvers in SHARE. Previously this process was not automated and handled outside of SHARE.</td>
<td>• Reduces risk, improves visibility, and eliminates paper and interoffice mail for attachments</td>
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<tr>
<td>Electronic Attachments</td>
<td>Key transactions now have electronic attachments, allowing users to attach files directly in SHARE and avoid sending paper forms through inter-office mail, FedEx, or hand delivery.</td>
<td>• Reduces paper copies and interoffice mail • <strong>Saves the state both time and money</strong> for over 570,000 attachments per year</td>
</tr>
<tr>
<td>User Access</td>
<td>User access roles are more function-based and streamlined to reflect the access that users require to do their jobs. Roles were assigned based on whether users performed specific transactions.</td>
<td>• Helps to <strong>standardize user roles and reduce risk</strong> by limiting access where it’s not needed</td>
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</table>
Technology: Maintaining SHARE Moving Forward

There will be regular improvements to SHARE going forward. There will be no upgrades of the scale of 9.2. The new model is continuous improvement.

What to Expect?

- Moving forward, the state will have a **standard schedule for updates** to keep the system up-to-date. This is our ‘new normal’ with two release of each suite annually.

- There will be **no ad hoc enhancements** between planned releases. The team will implement critical break fixes as needed.

- Financials was updated **March 26** with a combination of fixes and enhancements. The first 2018 HCM release was implemented **April 16** with regulatory changes, fixes and improvements.

- This represents a **paradigm shift** for the State and for the SHARE team. 2018 (and perhaps beyond) will be a year of transition and adjustment as we achieve this new normal.

- We all need to **adjust to frequent change**.
# Project Schedule

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Start Date</th>
<th>Completion</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>March 2016</td>
<td>August 2017</td>
<td>Completion of Project Management Plan, Charter and Project Schedule. Complete design and baseline configuration, complete initial development sprints</td>
</tr>
<tr>
<td>Implementation</td>
<td>March 2017</td>
<td>October 2017</td>
<td>Complete development, testing, training, communications, implementation and initial support.</td>
</tr>
<tr>
<td>Close Out</td>
<td>November 2017</td>
<td>December 2017</td>
<td>Transition to operations</td>
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## Project Budget

<table>
<thead>
<tr>
<th>Major Project Deliverable</th>
<th>Budget</th>
<th>Project Phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiation</td>
<td>$1,500,000</td>
<td>Initiation</td>
</tr>
<tr>
<td>Project Planning and Requirements, Design, Prototype</td>
<td>$3,500,000</td>
<td>Planning</td>
</tr>
<tr>
<td>Build and Deployment</td>
<td>$14,764,431</td>
<td>Implementation</td>
</tr>
<tr>
<td>Support- Post Implementation</td>
<td></td>
<td>Close Out</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$19,764,431</strong></td>
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SHARE Upgrade: Lessons Learned

- Planned for the fact that change management was bigger than the technical challenge
  - Experienced team dedicated to change management was the first team on the ground and remained involved in all aspects of project

- Sustained, consistent communication and engagement activities
  - Multiple communication channels and targeted stakeholder groups are necessary; information is often not cascaded within agencies/groups
  - Created Upgrade Governance Board; meaningful, focused participation from largest agencies

- Established project goals and used them for decision making
  - Emphasis on standardized processes and what agencies have in common

- Agile approach helped manage requirements and priorities, emphasized testing
  - Upgrade could not have been achieved otherwise

- PeopleSoft expertise is difficult to find in certain areas, even at a price

- There is a limit to the pace of change to which the State can adapt

- Varying levels of knowledge/skills/abilities across the State
  - Upgrade did not provide job training
Conclusion and Questions

Requesting closeout of the SHARE Upgrade project