**Project Charter Plan**

**Project One Date Integrations**

**<Single Sign on Process Evolution>**

**Project One**

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# Executive Summary

The state of Arkansas values education.  The University of Arkansas (UA) System was established to help ensure that Arkansans have access to quality education.  The UA System now encompasses the following institutions.

Universities

* University of Arkansas, Fayetteville
* University of Arkansas at Little Rock
* University of Arkansas for Medical Sciences
* University of Arkansas at Monticello
* University of Arkansas at Pine Bluff
* University of Arkansas at Fort Smith
* University of Arkansas System eVersity

Two-Year Colleges

* Phillips Community College of the University of Arkansas
* University of Arkansas Community College at Hope-Texarkana
* University of Arkansas Community College at Batesville
* Cossatot Community College of the University of Arkansas
* University of Arkansas Community College at Morrilton
* University of Arkansas Community College at Rich Mountain
* University of Arkansas Pulaski Technical College

Other Units

* Division of Agriculture
* Arkansas Archeological Survey
* Criminal Justice Institute
* Arkansas School for Mathematics, Sciences and the Arts
* University of Arkansas Clinton School of Public Service
* The Winthrop Rockefeller Institute

Currently the UA System Offices employs a small team of workers, known as the Project One Team, to gather and report on the academic and administrative data generated by these institutions. Complicating matters is the fact that each institution uses its own enterprise resource planning system to organize payroll, finance, procurement, human resource management, and student administration.

The UA System realized that it needed more automation to provide the needed manpower to keep up with its reporting needs. To address this problem, the UA System Office decided that it was time to choose a single, more streamlined, and modern system to track and organize this data. Ultimately the UA System decided to choose WorkDay as their global enterprise resource planning system. Now the next challenge begins, implementing WorkDay at the institutions that make up the UA System.

One major aspect of integrating data with any new application, is ensuring the user has an easier time using the product than before. The WorkDay integrations are a complete overhaul of a system that is used by the employees daily. In order to keep these users happy with the new overhaul, it must provide something new. That something new is speed and automation in this case.

An employee will become irritated with a system that requires them to have to enter their password every time. Just like a user accessing their email on a remembered device without having to enter the password. Or even bombarded with authenticator apps and texted codes to your phone. This is where Single Sign On (SSO) comes into play. This process allows the user to access WorkDay with just one tap. The Single Sign On (SSO) process is one used almost everywhere at this point, but implementing it is not as simple as the end product.

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# Project Purpose/Justification

In order for the single sign on process to take place, Azure Active Directory is where the switch is. The process is as simple as copying and pasting an employee ID into the text box and telling them to try logging in again. Eventually, this became unreasonable. Lists of testers came in by the hundreds, along with the first go live. This meant thousands of tickets, errors, and questions that came our way regarding employees being unable to access correctly. Long story short, In order to make sure these users accept Workday, a quicker way to access than a username and password is needed. Project One will rid the higher education in Arkansas of the many different platforms used for major administrative business functions. Many of these systems such as BOSS are outdated and make it complicated to keep track of the state as a whole. The amount of different systems used by the institutions in Arkansas is so high that the integration is divided into two groups to ensure ample time for the integration to roll out, rather than be thrust.

Because of the large amount of end users in the WorkDay integration, many complaints and issues arise. The small size of the Project One Team creates a need for the staff to be spread thin at times. This creates a need for specialization in order to make sure each step of the way is perfect. This specialization also allows for evolution in the processes used by an employee. My choice to specialize in the process of enabling Single Sign On (SSO) for users to log into WorkDay came to due to my initial customer service skills. Because of this specialization there is potential to become overwhelmed by the hundreds of new hires, sign in issues, or other human recourse processes that may halt logons. To avoid being overwhelmed by the mass amounts of data, automation comes into play.

## Business Objectives

This section should list the Business Objectives for the project which should support the organizational strategic plan.

* Remove any extra hops a user needs to access WorkDay;
* Improve the efficiency of administrative operations;
* Implement user-friendly intuitive systems for use system-wide;
* Provide smooth and seamless integration between Project One and other systems used by the campus community;
* Take advantage of continuing advancements in functionality and technology that would enable future improvements in business and administrative practices.
* Decrease the time spent manually entering users and increase the time innovating.
* Decrease the amount of complaints from waiting users due to lack of manpower.
* Decrease the need for more employees to do menial tasks.
* Increase the workload of the system to handle more users and grow.

# Project Description

This section provides a high-level description of the project. This description should not contain too much detail but should provide general information about what the project is, how it will be done, and what it is intended to accomplish. As the project moves forward the details will be developed, but for the project charter, high-level information is what should be provided.

In order for a user to access WorkDay via SSO they must first be hired in by their institution. Once the user is hired into their position Active Directory Synchronization Services syncs and approves them into the UASYS.edu Azure Active Directory tenant. INT4001 runs automatically on 30 minute intervals to set the EmployeeID of users who may be set with mismatched or empty values. This gives access to single sign on. The integration includes a Workday custom report to identify which users are active in workday and need SSO to be setup or that have an SSO mis-match. After being hired into Workday the user will be pulled by this report and added to Active Directory. INT4001 runs automatically on 30 minute intervals to set the EmployeeID of users who may be set with mismatched or empty values. This gives access to single sign on.

The integration includes a Workday custom report to identify which users are active in workday and need SSO to be setup or that have an SSO mis-match. After being hired into Workday the user will be pulled by this report and added to Active Directory.

The pipeline outputs CSV files to the SFTP server that let us know which users had missing or incorrect emails and universal IDs. The list of users set previous to and during the run are also available on the server after running. A catch all file is created as well to compare to the lists to manually check problematic cases.

## Project Objectives and Success Criteria

Objectives should be SMART: Specific, Measurable, Attainable, Realistic, and Time-bound. The project manager must be able to track these objectives in order to determine if the project is on the path to success. Vague, confusing, and unrealistic objectives make it difficult to measure progress and success.

The objectives which mutually support the milestones and deliverables for this project have been identified. In order to continue success on the SSO project, the following objectives must be met within the designated time and budget allocations:

* Ensure UALR, UAHT, and UACCM are fixing their UniversalID issues
* Ensure Cohort 2 gets set up smoothly to avoid rush of issues
* Achieve full institution cooperation in ensuring users are hired in correctly
* Introduce more UASYS employees to Snaplogic to automate more processes
* Introduce institutions to Snaplogic and other automation practices

## Requirements

The project team should develop a list of all high-level project requirements. These requirements are clear guidelines within which the project must conform and may be a result of input from the project sponsor, customer, stakeholders, or the project team.

This project must meet the following list of requirements in order to achieve success.

* The solution must be tested in the testing tenant prior to deployment
* Solution must be implemented without disruption to operations
* Process must be amendable if new cases arise
* Process must include logs for understanding errors

Additional requirements may be added as necessary, with project sponsor approval, as the project moves forward.

## Constraints

Constraints are restrictions or limitations that the project manager must deal with pertaining to people, money, time, or equipment. It is the project manager’s role to balance these constraints with available resources in order to ensure project success.

The following constraints pertain to the SSO project:

* All security hardware and software must be compatible with our current IT platforms
* All hardware and software must be purchased in accordance with the allocated budget and timeline
* Issues such as UALR not getting on board and causing themselves more issues
* Institutions will have to change their active directory scoping filters

## Assumptions

The project team must identify the assumptions they will be working under as the project goes forward. These assumptions are what the project manager/team expect to have or be made available without anyone specifically stating so.

The following are a list of assumptions. Upon agreement and signature of this document, all parties acknowledge that these assumptions are true and correct:

* The process will encounter periods where it has to be taken down for maintenance
* The purpose of this project is to reduce hops needed to login to Workday via single sign on
* The process will evolve as more duplicates arise

## Preliminary Scope Statement

The preliminary scope statement is a general paragraph which highlights what the project will include, any high-level resource or requirement descriptions, and what will constitute completion of the project. This preliminary scope statement is exactly that: preliminary. All of this information will be expanded upon in greater detail as the project moves forward and undergoes progressive elaboration.

Project completion is when no more SSO tickets are entered into the system needing support on a regular basis. These tickets need to come to a trickle and only special cases would be arising upon completion. As time goes on this proves to be true.

# Risks

All projects have some form of risk attached. This section should provide a list of high-level risks that the project team has determined apply to this project.

Automation comes with a risk. Unlike with human error that often gets caught quickly, automation error can wreak havoc on a database if left running incorrectly.

Risks of the automated SSO process include:

* No Universal ID
* User outside of Azure Active Directory filtering scope
* User is a new hire who was told to access before synchronizing

# Project Deliverables

This section should list all of the deliverables that the customer, project sponsor, or stakeholders require upon the successful completion of the project. Every effort must be made to ensure this list includes all deliverables and project sponsor approval must be required for adding additional deliverables in order to avoid scope creep.

The following deliverables must be met upon the successful completion of the ISA project. Any changes to these deliverables must be approved by the project sponsor.

* Fully deployed intranet security solution
* Technical documentation for intranet security solution
* Recommendation list for future security considerations

# Summary Milestone Schedule

The project Summary Milestone Schedule is presented below. As requirements are more clearly defined this schedule may be modified. Any changes will be communicated through project status meetings by the project manager.

|  |  |
| --- | --- |
| **Summary Milestone Schedule – List key project milestones relative to project start.** | |
| **Project Milestone** | **Target Date (mm/dd/yyyy)** |
| 1. Project Start | 01/01/2020 |
| * Drawing Design | 01/21/2020 |
| 1. Manual Entering | 01/26/2020 |
| 1. Powershell entering one user at a time | 03/01/2020 |
| 1. Powershell running lists overnight | 04/01/2020 |
| 1. Snaplogic needs another unique ID and users are then assigned | 05/01/2020 |
| 1. Project Complete | 05/15/2020 |

# Summary Budget

The following table contains a summary budget based on the planned cost components and estimated costs required for successful completion of the project.

|  |  |
| --- | --- |
| **Summary Budget – List component project costs** | |
| **Project Component** | **Component Cost** |
| 1. Snaplogic | $ 24000.00 per year |
| * Laptop | $600 |
| 1. 1400 Man hours | $18,000 |
| **Total** | **$48,000** |

# Project Approval Requirements

The organization must understand when the project has reached a successful completion. These criteria must be clear and should be accepted by whoever will sign-off on the project’s closeout. Once signed-off by the authorized person, the project is deemed approved and is successful as long as it has met all of the agreed upon requirements.

Success for the project will be achieved when a fully tested solution, and all technical documentation, is fully deployed throughout the company within the time and cost constraints indicated in this charter. Success will also be gauged upon the level of tickets coming in before and after process implementation. Success will be determined by the Project Sponsor, Chris Lee, who will also authorize completion of the project.

# Project Manager

This section explicitly states who is assigned as the PM, their responsibility, and authority level. Depending on the organization and scope of the project, the project manager may have varying levels of responsibility and authority for personnel, project expenditures, and scheduling.

The project manager of this project is Chris Lee. He is the main project manager of everything Project One and is who I report to. The project itself is something I work on myself and manage all of the small things, Chris comes in when I need help, funding, or extra direction to find support.

# Authorization

This section provides the names and authorization, once signed, for the project to move forward in accordance with the information contained in this charter.

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>

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