Through the Eyes of a Project Manager

IST345 Managing Information Systems Projects

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Why is Project Management Important?

- Ensures the right work is done to produce the expected output
  - "The application of knowledge, skills, tools and techniques to project activities to meet project requirements."

- Focuses on the Knowledge Areas to achieve success:
  - Scope, Time, Cost, Communication, Human Resource, Risk, Quality, Procurement, and Integration

- Keeps project team focused on project's scope and delivery

- Ensures communication between customer and project team

Campus Solutions 9.2 Upgrade

Background

- 1.5 year project
- 75 People worked on this project
- 3 Sponsors
- 11 Functional teams
- 18 Teams that send or receive data to/from Campus Solutions
- 7 Technical teams such as Developers, DBAs, Infrastructure, etc.
- 400 SU customizations

Scope

- Vendor support expires on Dec. 29, 2019
- To continue to obtain financial aid regulatory updates, stay current in other required functionality, and maintain Oracle support
- Analyze and test over 400 customizations in new version
- Ensure data interfaces maintain current expectations
- Set up basic underlying structure for Fluid
- Move Personal Services pagelet into My Profile which uses Fluid functionality

Campus Solutions 9.2 Upgrade Scope

Student Information Services
- Admissions
- Campus Community
- Student Financials
- Student Records
- SU Abroad
- Financial Aid
- Graduate Student Awards
- Enrollment and Student Experience
- Law School
- School of Education
- University College

Applications That Transfer Data
- Academic Affairs
- Office of Disability Services
- Housing
- Academic Integrity
- Auxiliary Services
- Budget Office
- Department of Public Safety
- Financials
- United Way
- Human Resources
- Payroll
- Advancement and External Affairs
- Office of Institutional Research

Campus Solutions 9.2 Project

**Project Phases**   **Timeline**   **Project Management Phases**

Discovery – Functional and Technical
- Review release information from vendor
- Analyze effect on our customizations, work required, time, resources, staff
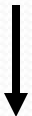- Assist with scope statement development
- Review hardware requirements

Planning
- Inventory all SU customizations and update specifications
- Contribute to scope statement development
- Contribute to project schedule development
- Build DEV, UNIT, and RT environments
- Analyze effect on other SU applications
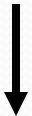
Redevelopment and Unit Testing
- Redevelop and unit test all SU customizations
- Begin upgrade passes

A

Initiating
- Develop project charter
- Start scope statement development
- Identify project team members and responsibilities
- Set up project team including project sponsors

Planning
- Develop project schedule
- Analyze effects on our customizations, work required, time, resources, staff
- Finalize scope statement; gather approvals
- Communication plan established
- Develop progress tracking tools
- Set up meetings with Sponsors
- Set up a change management process
- Start an issues log

Executing; Monitoring and Controlling
- Review status reports
- Conduct functional status meetings
- Report progress to sponsors in status meetings
- Enforce and revise project schedule if necessary
- Resolve issues as they arise
- Recognize changes and make revisions when critical to project
- Monitor risks and resolutions

Campus Solutions 9.2 Project

Project Phases **Timeline** **Project Management Phases**

Lifecycle 1 Regression Testing
- Set up regression test environment (Performed in PROD-like environment)
- Test ALL functionality (delivered and customized)
- Test ALL business processes
- Test ALL interfaces
- Resolve issues uncovered

Lifecycle 2 Regression Testing
- Reset regression testing environment
- Re-test ALL functionality (delivered and customized)
- Re-test ALL business processes
- Re-test ALL interfaces
- Execute performance test

Decision: Go or No-Go

Implementation Planning and Dry Run
- Execute communication plan (Email sent to 20,000 people!)
- Execute Dry Run (Dress Rehearsal)
- Establish Go-Live Schedule using lessons learned from Dry Run

B

Executing;

Monitoring and Controlling
- Review status reports
- Conduct functional status meetings
- Report progress to sponsors in status meetings
- Resolve issues as they arise
- Revise project schedule
- Address resource issues
- Monitor risks and resolutions

Continues through project completion

Campus Solutions 9.2 Project

Project Phases **Timeline** **Project Management Phases**

Executing;
Monitoring and Controlling
- Review status reports
- Conduct functional status meetings
- Report progress to sponsors in status meetings
- Resolve issues as they arise
- Revise project schedule
- Address resource issues
- Monitor risks and resolutions
- Participate in Go-Live Weekend
- Execute Communication Plan

Go-Live Weekend
- Brought all systems down at 5:00 PM on Fri., Sep. 27
- Started Go-Live schedule
- Finished at 7:00 PM on Sat., Sep. 28

C

Closing
- Participate in Lessons Learned sessions
- Celebrate!

Closing
- Conduct and document Lessons Learned sessions
- Finalize key project documents
- Communicate successful completion
- Celebrate!

Schedule Milestones – Campus Solutions 9.2 Upgrade

- ★ **Project Start Date**   **09/05/18**
- ★ **Project Planning and Organization**   **12/21/18**
- ★ **Technical Discovery and DEV Upgrade Pass**   **12/21/18**
- ★ **Customizations – Review and/or Create Specifications**   **12/17/18 – 01/31/19**
- ★ **CS Redevelopment and UNIT Testing (Developers)**   **01/02/19 – 02/01/19**
- ★ **Redevelopment and UNIT Testing**   **02/11/19 – 05/10/19**
- ★ **Change Requests Due (Changes NOT duplicated in CS 9.0)**   **02/28/19**
- • **Lifecycle 1 Functional Testing**   **05/28/19 – 07/12/19**
- • **Lifecycle 2 Functional Testing**   **07/29/19 – 09/13/19**
- • **Dry Run and Preparation for Go-Live**   **09/16/19 – 09/26/19**
- • **Go-Live Weekend**   **09/27/19 – 09/29/19**
- • **Rain-Date Weekend**   **10/11/19 – 10/13/19**

Other Key Weekend Reminders

- • **Orange Central**   **09/12/19 – 09/15/19**
- • **Family Weekend**   **10/18/19 – 10/20/19**

High Level Scope Analysis

Scope (In, Out)	Items for Consideration	Resource Needs (H,M,L)	Time Needs (H,M,L)
In	Remove obsolete customizations. This includes removal of some HR/PY customizations that are obsolete due to the PS Split.		
In	Interface revisions needed for delivered functionality		
In	HCM revisions only to accommodate integration needs and/or revised interfaces.		
In	Discovery investigation on preferred gender and pronoun functionality - Delivered functionality only, no customizations		
~~In*~~ Out of Scope	Discovery investigation on the conversion of Greyheller (Appsian) pages to Fluid - Delivered functionality only, no customizations		
~~In*~~ Out of Scope	Discovery investigation regarding implementation of Student Center (Registrar) - Delivered functionality only, no customizations		
In*	Discovery investigation of Fluid Objects - Delivered functionality only, no customizations		
In*	Discovery investigation of Displayed Name Functionality		
Out	Activity Guides functionality		
Out	Slutzker – Move I-9 data into HCM 9.2 tables - Trudi will talk with Steven Medicis. She will let me know if this should be considered a Discovery item. - After Discovery, a Change Request must be submitted for this item to be considered for inclusion in the project.		
Out	Career/term structure change (Current Discovery effort can continue; In-scope NO)		
Out	OnBase Upgrade except for inclusion during testing phases to ensure that it works well with CS 9.2. This is similar to non-PeopleSoft interface testing. Dan is evaluating the timeline.		
Out	Hyperion Upgrade/Replacement (Vendor evaluation in progress)?		
Out	Future PeopleTools Upgrades beyond PeopleTools 8.56		

*These items will be included for Discovery. Following Discovery, Change Requests must be submitted for items to be considered for inclusion in the CS 9.2 Upgrade project.

Communication Schedule

Target Dates	Complete?	This Schedule Updated September 26, 2019
Week of Aug. 19 or 26	Aug. 29	Email to DDD list—Preview the update, alert about the downtime and ask for DDDs to share with their reports.
Thu., Aug. 29	Aug. 29	Email to NOTIFY_ITS@LISTSERV.SYR.EDU. This email is sent as an outcome from the Change Management meeting when the group is notified of our upgrade weekend.
Mon. , Sep. 2	Aug. 30	Block message on MySlice—Alert users to the downtime and the upgrade. (Provide link to answers.syr.edu page, if possible.)
Week of Sep. 2 or 9 **(ITS Listserv Emails)**	Sep. 4	ITS email to FINTECH, HCMTECH, SATECH Preview the update, alert about the downtime, and what the update will mean for users.
Wed., Sep. 4	Sep. 4	Post on Save Screens of PC Labs (approved by Marketing & Comm). - Eric P is concerned about the link and will check it on Sept. 4. - Dan had no additional feedback. - Link was removed because it cannot be set up on a screen saver.
Week of Sep. 9	Sep. 12	ITS email to ITS-INTERNAL Preview the update, alert about the downtime, and what the update will mean for users.
TBD **(Functional Area Emails)**	TBD by Each Area	Emails to internal listservs (Example: Reg News (staff only)). These are area-specific internal communications.
Wed., Sep. 18	Sep. 18	SU News story—An SU News story to include information on the downtime and what the update will mean for users—what they can expect. This should also include answers.syr.edu page.
Wed., Sep. 18	Sep. 18	SU Today—Include SU News story in SU Today.
Wed., Sep. 18	Sep. 18	Social Media—Post SU News story.
Week of Sep. 23	Sep. 26	ITS email to ITS-INTERNAL Preview the update, alert about the downtime, and what the update will mean for users.
Week of Sep. 23		Dan sends targeted messages to ITS areas that need to be on alert during Go-Live weekend.
Tue., Sep. 24	Sep. 24	Email blast—An email to the entire campus community noting the downtime of Campus Solutions/Student Administration functions and MySlice the weekend, and what the update will mean for users. This should also include link to answers.syr.edu page.
Fri., Sep. 27	Sep. 27	Email to Functional and Interface Leads: Reminder that Go-Live starts today. Only the ones who need to signoff at end of business on Friday.
Fri., Sep. 27 **Approx. 5-6:00 PM**	Sep. 27	Email to Functional and Interface Leads: This is the OK to start message after we hear from Payroll and FIN that their processing is complete.
Upgrade Completed	Sep. 28	Remove downtime alert message on MySlice. Request by Sponsors to remove this when we are finished even if it is before Mon., Sep. 30 at 6:00 AM.

FUNCTIONAL AREA METRICS - Customizations

Team	Status	Aug 2 Goal	Aug 2 Actual	Aug 9 Goal	Aug 9 Actual	Aug 16 Goal	Aug 16 Actual	Aug 23 Goal	Aug 23 Actual	Aug 30 Goal	Aug 30 Actual	Sep 6 Goal	Sep 6 Actual	Sep 13 Goal	Sep 13 Actual	Running Total Goal	Running Total Actual	Out-Standing	Total	Original Total	Comments (REQ if Red/Yellow Status)
ADM LaRocca	Green	10	17	10	3	10	39	10	5	10	0	14	0	0	0	64	64	0	64	66	DONE 4 customizations (External Test Score Load, Suspense, Purge, Processing) determined not needed (64-4=60). 2 customizations determined not needed (66-2=64).
CC Medicis	Green	0	6	0	3	8	3	8	11	8	2	8	1	0	6	32	32	0	32	33	DONE 09/11: All Campus Community projects are in fine shape for migration to the CS92 PROD environment. Remaining ENTDEFs have been submitted for post-go-live work and implementation.
FA GSA Bergin	Green	15	8	21	35	21	0	21	12	21	58	15	0	0	1	114	114	0	114	118	DONE 09/16: No showstoppers. The outstanding defect (GRAD Award System GS001) has been approved for the 9.2 upgrade and will be checked during Dry Run. 5 customizations added (113+5=118) 1 customization added from NOT Needed (112+1=113): FA007 3 new customizations added (109+3=112) 9 customizations determined not needed (118-9=109)
SOE Salanger	Green	0	0	0	0	0	0	0	0	1	0	0	1	0	0	1	1	0	1	1	DONE
ESE Appiah-Okyere	Green	0	0	2	0	4	1	4	6	2	4	0	1	0	0	12	12	0	12	9	DONE 8/9: ESE006, ESE007 8/16: ESE008, ESE009, ESE010, ESE8866 8/23: ESE005, ESE001, ESE003, ESE004 8/30: ESE005, VD001 2 new customizations added (10+2 =12): ESE008, ESE009 1 new customization added (9+1=10): ESE010
Law Danielle Burgo Denee Page Ian Brown	Green	1	0	1	4	1	0	1	0	0	0	0	0	0	0	4	4	0	4	4	DONE - 8/2: AD095 - 8/9: AD080 - 8/16: AD111 - 8/23: AD141
SF Pyland	Green	8	9	8	12	9	2	9	12	9	8	9	9	0	0	52	52	0	52	52	DONE
SR Horne (3-1160)	Green	20	25	0	3	25	42	30	11	30	18	10	13	2	5	115	117	0	117	114	DONE 09/16: No showstoppers. College Net Series 25 SIS Interface and Faculty Class Roster have been approved for Go-Live. The outstanding Greyheller defects have been approved for the 9.2 upgrade and will be scheduled for correction post-go-live. 1 customization determined not needed (114-1=113) 3 customizations moved to needed (113+2=116) 1 customization (SR347) moved to needed (116+1=117)
SUAB Sturgeon	Green	0	0	0	0	0	0	0	1	0	0	2	0	0	1	2	2	0	2	2	DONE
UC Collins	Green	0	0	1	2	1	1	1	1	1	0	0	0	0	0	4	4	0	4	4	DONE
S-PP-PS McEntee	Green	4	17	18	8	11	15	7	4	6	2	6	3	0	3	52	52	0	52	53	DONE 09/16: No showstoppers. The outstanding Greyheller defect has been approved for the 9.2 upgrade and will be scheduled for correction post-go-live. 1 customization added (Grades First for Athletics) (51+1=52) 2 customizations determined not needed (53-2=51) 05/31: 2 of the 17 customizations marked complete because they can not be tested until LC2 as they are related to provisioning.
TOTAL		58	82	61	70	90	103	91	63	88	92	64	28	2	16	452	454	0	454	456	

Project Manager Responsibilities

- Deliver the project on time, on budget, and within scope
- Manage the people who are building the end product
- Manage all aspects of the project:
  - Scope
  - Time
  - Cost
  - Quality
  - Human Resources
  - Communications
  - Risk
  - Procurement
  - Stakeholder
- Monitor, analyze, and implement approved changes
- Usually does **<u>not</u>** do the actual building of the end product

System Analyst Responsibilities

- Deliver the expected outcome on time, on budget, and within scope
- Work under direction of the project manager and/or project leads
- Work related to producing the expected outcome such as:
  - Represent the needs of their business area
  - Develop expect outcome requirements
  - Evaluate alternative solutions
  - Develop specifications
  - Test system components
  - Perform implementation steps
  - Train business area customers
  - Coordinate with all other project participants and business areas
- Can be asked to perform some project management tasks within his/her specific area

PM Expectations of All Team Members

- Commitment to the project and its end goals
- Ownership and dedication to quality work
- Set accurate target dates and meet them
- Early notification of issues
- Attendance at regular status meetings
- Status report submission
- Honesty
- Respect for all team members
- Collaboration
- Open communication

Contemporary Issues in PM

- Set Management Expectations
- Too much work; not enough resources
- Set Project Team Expectations
- Project team members do not report to the PM
- Communication
- Malfunctioning Project Teams

Issue – Set Management Expectations

- **Resources needed**
  - Functional
  - Technical

- **Time commitment of key resources**
  - Weekly commitment
  - Long term commitment

- **Business process changes**

- **Interactions with other areas of the business**

- **Financial expectations**

- **Training needs**

Issue: Too much work; not enough resources

Resource Planning
- Understand the division and enterprise priorities
- Identify normal business needs for upcoming year
- Identify project needs and resources for upcoming year
- Analyze resource capacity and resource needs

Determine gap and solution(s)
- Increase project funding for additional resources
- Hire additional resources for project work
- Hire additional resources to backfill operations needs
- Extend project length

Lessons Learned
- Start project ONLY after additional resources are obtained
- Plan ramp-up time for additional resources
- Hard go-live date should be set midway through the project

Issue – Set Project Team Expectations

- **Team members do not understand the amount of work in an IT Project**
  - Business decisions
  - Process changes
  - Increased collaboration required
  - Functional and technical specifications development
  - Data validation
  - Testing
  - Training

- **Team members will not like the rigor of project management processes**
  - Weekly status reports
  - Work estimation and accountability
  - Project schedule adherence
  - Test scenarios and plan development
  - Business process reengineering

Issue – Project team members do not report to PM

- Three Lessons Learned:
  - Identify concrete deliverables throughout the project
  - **TRUST BUT VERIFY Principle**
  - Use executive management when necessary

Issue – Communication

Communication is 80-90% of Project Manager's job

- Identify audiences and communication needs
- Use project management documents
- Maintain a project schedule
- Create an open atmosphere
- NEVER assume that people read your written communications, including email

Issue - Malfunctioning Project Teams

SHARED OPERATING VALUES	DESCRIPTION
1. Keep It Real	Say what you mean, mean what you say; be honest and sincere – no need for political smooth talking; no secrets.
2. Personal Respect	Engage in mutually respectful actions toward other; treat everyone as equal (i.e. leave your title at the door AND no negative consequences from conversations); be trustworthy and trusting; hold things appropriately confidential; don't disrupt others with your use of technology; be supportive of each other.
3. Actively Participate	Speak up IN the meeting NOT later (i.e. speak now or forever hold your peace); voice your opinions and thoughts AND actively support final decisions made in meetings. In Practice: This is meant to discourage negative comments about the project or other means of undermining the project in any way. This is not meant to discourage productive project conversations outside meetings. These discussions may raise valid issues and concerns that should be shared at the next meeting or sooner if appropriate.
4. Accountability	Hold yourself and others accountable to meet the commitments made to others (including promised due dates). In Practice: 1. Shared Operating Values will be posted in MR2. 2. At the first meeting after posting, the Meeting Leader will call the team's attention to the posting, encouraging any final discussion. 3. Violations can be discussed after the meeting between the parties involved. 4. If these discussions do not help, the Project Manager can also be involved in the discussion. 5. Continued violations might necessitate a discussion during a meeting. 6. If a meeting gets really out of hand, an in-meeting discussion might be necessary. 7. These values can be discussed during area meetings as a template to encourage development of "Area Operating Values" or used as is in the area.
5. Thoughtful Listening	One voice at a time, let the speaker finish without interrupting; listen thoughtfully to the speaker; wait to formulate your answer before you respond.
6. Be Creative	Look at problems in different ways; be innovative & imaginative; embrace creative conflict; work smarter not longer.
7. Professional Enjoyment	Have fun; be professional; maintain a sense of humor; acknowledge and appreciate efforts by others; as long as respect has been demonstrated, don't take things personally.
8. Meeting Respect	Work together collaboratively; be a team player; keep an open mind; mind meeting mechanics (start on time, come prepared, do homework, IF you have to step out of a meeting it is YOUR responsibility to catch up).

Key Suggestions

- Get visible management support

- Get customer involved early

- Communicate early and often

- Set customer and project team expectations

- Appreciate your project team members

- Learn how to use scheduling tools: MS Project

- Identify the project's risks and contingency plans

- Work toward a project management certification

Is Project Management For You?

Setting YOUR Expectations:
- Project Management is more than a 40 hour/week job
- Companies don't hire new graduates as project managers

Project Management References
- <u>A Guide to the Project Management Body of Knowledge</u>, Project Management Institute
- PMI website
- Project management website

Project Management Professional (PMP) Certification
- Project Management Institute
- Requirements
  - 3 years project management experience
  - 35 hour class
  - Pass the PMP exam

Questions?