

Shared Financial System (SFS) Survey Results

(Data used for Post Project Review, scheduled for February 9, 2006)

SFS Survey (Launched 1/17/2006, Closed 2/03/2006)

Survey sent to: 72 individuals (1 returned email) = 59% response rate

Total Respondents 42

1. Please select from the following, the group that best describes your MAJOR role in the SFS Upgrade Project:

	(Responses)	%
Upgrade Core Group	(14)	33%
Site Leader	(15)	36%
Program Management (Executive Sponsors, Executive Advisory Group Members, Project Office Member, Steering Committee Members)	(10)	24%
Other, please specify	(3)	7%
1. Vendor/Voucher Entry in Accts Payable		
2. Upgrade Core Group and Site Leader		
3. SFS user		

2. SFS Upgrade - Project Communications

	Strongly Agree	Agree	Neither Disagree nor Agree	Disagree	Strongly Disagree	N/A	Response Total
C1 There were clear team Communications	24%(10)	68% (28)	5% (2)	2% (1)	0% (0)	0% (0)	41
C2 I would use words like "open, honest and timely" to describe the communication among team members	32% (13)	61% (25)	5% (2)	2% (1)	0% (0)	0% (0)	41
C3 Project related meetings made good use of my time	18% (7)	53% (20)	18% (7)	11% (4)	0% (0)	7% (3)	38
C4 The frequency and duration of the project meetings was sufficient	16% (6)	70% (26)	14% (5)	0% (0)	0% (0)	10% (4)	37
C5 The frequency of site leader meetings was sufficient	20% (6)	50% (15)	23% (7)	7% (2)	0% (0)	27% (11)	30
C6 The frequency of the program management meetings was sufficient	16%(4)	52% (13)	32% (8)	0% (0)	0% (0)	39% (16)	25
C7 I was informed of issues and their impact in a timely manner	27%(11)	56% (23)	10% (4)	5% (2)	2% (1)	0% (0)	41

C8 I was informed of issues that would impact the campus in a timely manner	26% (9)	57% (20)	14% (5)	3% (1)	0% (0)	15% (6)	35
C9 The status of open issues was communicated effectively	27% (11)	51% (21)	7% (3)	15% (6)	0% (0)	0% (0)	41
C10 I was given the information I needed to do my job	27% (11)	61% (25)	10% (4)	2% (1)	0% (0)	0% (0)	41
C11 Communication lines between the project manager(s) and the project team were effective	21% (8)	66% (25)	8% (3)	5% (2)	0% (0)	7% (3)	38
C13 The SFS Upgrade website was an effective method for communicating status	29%(11)	47% (18)	24% (9)	0% (0)	0% (0)	5% (2)	38
C14 My campus was aware of the timeline and requirements of the project	36%(13)	56% (20)	8% (3)	0% (0)	0% (0)	12% (5)	36

N/A responses removed in calculating percentages (Response total adjusted to reflect removal of N/A)

3. Additional comments about communication:

1. Question C7: I would sometimes find the issues out myself from testing. Question C9: They were not effectively communicated directly after the Upgrade. There are still open issues not listed on the Open Issue excel file on the upgrade website.
2. The SFS web site is a good way to disseminate information. There should also be a communication mechanism to push information to project members.
3. Site Leader monitoring, guidance and communication could have been better.
4. I think we could have done a better job with issue management. We did an adequate job of capturing issues although I believe that many opportunities for identifying issues were missed. I think where we fell short was on really analyzing the impact of the issue e.g. figuring out the magnitude of the problem, who it impacted, what the alternatives were etc.
5. Project staff at UWSA and DoIT were readily accessible for inquiries specific to a campus issue.
6. The communication of status, issues and timelines were clear and concise. In addition there was a format for each that was utilized throughout the project. The consistency of the format and the timing greatly enhanced the sense that the project was under control and being managed effectively.
7. I liked the teleconferences where you could continue the work at your site, but yet be updated on the status of the project.
8. I do not feel that the issues for Accounts Receivable Billing were communicated effectively. At times I got the impression that it was Extensions fault that AR/BI was behind everyone else, when in fact the modules were not working and needed for corrections in the set up. I don't think that all parties were aware that these modules were not working until very late in the entire process.
9. It would have been great to have the detail book that was handed out at the Controller's Conference earlier. DoIT's management of the project was excellent. It is always difficult to determine what needs to be done centrally and what needs to be distributed for the campus to handle. With the lack of resources all around I can understand the need to decentralize some functions. Those functions that are decentralized should be communicated as early as possible.
10. In some cases, I felt that the project management did not seek help with problems soon enough. Perhaps the project would have run more smoothly if more help (technical, professional) was sought earlier.

4. SFS Upgrade - Project Management

	Strongly Agree	Agree	Neither Disagree nor Agree	Disagree	Strongly Disagree	N/A	Response Total
PM1 The project manager(s) provided needed support and guidance to the team	30% (11)	57% (21)	13% (5)	0% (0)	0% (0)	5% (2)	37
PM2 The project manager(s) seemed involved in the process	46% (17)	46% (17)	8% (3)	0% (0)	0% (0)	5% (2)	37
PM3 My project manager recognized my contribution to this group effort	32% (11)	53% (18)	15% (5)	0% (0)	0% (0)	13% (5)	34
PM4 Issues were properly identified, captured and scoped	26% (10)	49% (19)	10% (4)	15% (6)	0% (0)	0% (0)	39
PM5 I was empowered to participate in discussions regarding issues that affected my work	37% (14)	53% (20)	10% (4)	0% (0)	0% (0)	3% (1)	38
PM6 The appropriate people were involved in defining the project's functional requirements	26% (9)	44% (15)	21% (7)	9% (3)	0% (0)	41% (4)	34
PM7 The appropriate people were involved in developing the project plan	26% (9)	50% (17)	21% (7)	3% (1)	0% (0)	13% (5)	34
PM8 We had an adequately defined implementation strategy for the project	29% (11)	55% (20)	10% (4)	8% (3)	0% (0)	3% (1)	38
PM9 The appropriate people were involved in implementing the project	33% (13)	59% (23)	8% (3)	0% (0)	0% (0)	0% (0)	39
PM10 I consistently understood the status of the project	21% (8)	59% (23)	10% (4)	10% (4)	0% (0)	0% (0)	39
PM11 Project status reviews were used effectively on the project	26% (10)	59% (23)	15% (6)	0% (0)	0% (0)	0% (0)	39
PM12 As a Site Leader my role was clearly defined and I understood my responsibilities	29% (6)	52% (11)	19% (4)	0% (0)	0% (0)	46% (18)	21
PM13 The appropriate people were involved in defining the project's technical requirements	18% (7)	55% (21)	16% (6)	11% (4)	0% (0)	3% (1)	38

PM14 Project issues were resolved effectively by the right people and in a timely manner	15% (6)	51% (20)	18% (7)	15% (6)	0% (0)	0% (0)	39
PM15 Unresolved issues did not affect my ability to perform my tasks	16% (6)	51% (19)	16% (6)	14% (5)	3% (1)	5% (2)	37
PM16 I used the project status meetings to raise and resolve my issues	14% (5)	72% (26)	11% (4)	3% (1)	0% (0)	8% (3)	36
PM 17 Decisions about schedule changes involved the right people	19% (7)	64% (23)	14% (5)	3% (1)	0% (0)	8% (3)	36
PM 18 Project risks were clearly identified	23% (9)	72% (28)	5% (2)	0% (0)	0% (0)	0% (0)	39
PM 19 Risks to the project were managed effectively	23% (9)	67% (26)	10% (4)	0% (0)	0% (0)	0% (0)	39
PM 20 I would use words like "open, honest and timely" to describe the communication of the project status by the project manager(s)	38% (15)	51% (20)	10% (4)	0% (0)	0% (0)	0% (0)	39
PM 21 The purpose and roles of the focus teams was clearly understood and useful	18% (6)	62% (21)	15% (6)	3% (1)	0% (0)	13% (5)	34
PM 22 The purpose and role of the Site Leaders was clearly understood and useful	21% (7)	73% (24)	6% (2)	0% (0)	0% (0)	15% (6)	33

5. Additional comments about Project Management for this Upgrade

1. Many of the questions do not or did not apply to the interface campuses.
2. I think the focus teams worked initially when they were identifying the impact of the changes and working on the scripts. I think the value of these groups sort of faded away over time - maybe from lack of clear direction and roles. I do think going forward that this concept has value but we need to structure it better to take advantage of it.
3. It would have beneficial to take a look at new technology and features as opposed to 'status quo' using 7.5 technology (i.e. SQR's vs. XML).
4. Developers would have benefited from greater understanding, communication and input on the infrastructure changes.
5. They knew what was happening and communicated to others
6. The Accounts Receivable/Billing function was continually put off until it looked like it would jeopardize the entire upgrade timeline. Issues that came up when Sue Ballweg first started looking at 8.8 were still issues 9 months later. We understand that since we were the only campus using AR/BI that we had a much smaller voice screaming for assistance, but it definitely could have been handled better. I felt that the Project Manager was not kept up to date on the issues with Accounts Receivable Billing. I feel that

the issues with AR/BI were not always taken seriously until it looked as though it would jeopardize the conversion date in November. There were issues that were identified with the first look at 8.8 in the fall of 2004 that were not fixed until October of 2005.

7. I think that some issues were missed in the planning and fit gap stage. These did not turn out to be material in the end, so the failure to identify them was apparently managed properly later on.

6. SFS Upgrade - Support, Goals and Sponsorship

	Strongly Agree	Agree	Neither Disagree nor Agree	Disagree	Strongly Disagree	N/A	Response Total
The necessary project stakeholders were represented on the team	19% (7)	76% (28)	5% (2)	0% (0)	0% (0)	5% (2)	37
S2 My direct manager recognized my contribution to this effort	29%(11)	49% (18)	14% (5)	8% (3)	0% (0)	5% (2)	37
S3 The Executive Sponsors provided needed support and guidance to the team	19% (6)	39% (12)	32% (10)	10% (3)	0% (0)	24% (8)	31
S4 The Executive Advisory Group provided needed support and guidance to the team	20% (6)	43% (13)	30% (9)	7% (2)	0% (0)	23% (9)	39
S5 Team members accepted their tasks and followed through to complete their tasks	13% (5)	77% (30)	5% (2)	3% (1)	0% (0)	3% (1)	38
S6 I clearly understood how my contribution fit into the overall project schedule	35%(13)	54% (20)	8% (3)	3% (1)	0% (0)	5% (2)	37
S7 Project deliverables were clearly understood by my team members	17% (6)	69% (25)	14% (5)	0% (0)	0% (0)	8% (3)	36
S8 The project team had a good understanding of my contribution to this project	14% (5)	62% (23)	24% (9)	0% (0)	0% (0)	5% (2)	37
S9 My campus had a good understanding of my contribution to this project	14% (4)	68% (19)	18% (5)	0% (0)	0% (0)	28%(11)	28
S10 My individual deliverables were achievable	19% (7)	67% (25)	11% (4)	3% (1)	0% (0)	5% (2)	37
S11 Everyone on the team knew and understood the team's priorities	18% (7)	63% (24)	13% (5)	3% (1)	3% (1)	3% (1)	38
S12 Roles and responsibilities of the team members were clear	10% (4)	74% (29)	5% (2)	10% (4)	0% (0)	0% (0)	39

7. Any additional comments about “support, goals and sponsorship” for the SFS Upgrade?

1. I've worked on many projects. The original task list is usually incomplete. The original assignments are usually not the final assignments. Usually a small group of very experienced employees end up with the bulk of the implementation planning and tasks. We had a good project manager who worked with us to find that small implementation group, and also doled out less critical sub-projects to newer employees that provides great training for the future.
2. I think we could have done a better job on the roles and responsibilities for the team members. We did a good job with the site leaders role and responsibilities but not with everyone else. Specifically, we probably could have been clearer about who was responsible for what between UWSA and DoIT team members.
3. DoIT was heavily represented on the Executive Oversight groups, perhaps too much. What role did the Executive Sponsors play?
4. I believe in the importance of getting all the sponsorship involved, as they then play a more active role because they know what is happening.

	Strongly Agree	Agree	Neither Disagree nor Agree	Disagree	Strongly Disagree	Response Total
T1 The organization of the environments into separate instances was useful and correct	10% (4)	68% (27)	18% (7)	5% (2)	0% (0)	40
T2 The refreshing of data from production SFS was adequate and timely	10% (4)	48% (19)	20% (8)	18% (7)	5% (2)	40
T3 There was understandable documentation or explanation about specific differences between the functionality in 7.5 and 8.8	10% (4)	44% (17)	28% (11)	18% (7)	0% (0)	39
T4 The overall quality of the upgraded system is comparable to the previous system	10% (4)	69% (27)	18% (7)	3% (1)	0% (0)	39
T5 I had adequate training to perform my assigned tasks	8% (3)	67% (26)	15% (6)	8% (3)	3% (1)	39
T6 SFS 8.8 is easier to use than SFS 7.5	13% (5)	28% (11)	44% (17)	10% (4)	5% (2)	39
T7 The testing of SFS functionality during this project was adequate to go ahead with the upgrade	11% (4)	79% (30)	5% (2)	3% (1)	3% (1)	38

T8 The testing of SFS bolt-ons and interfaces during this project was adequate to go ahead with the upgrade	13% (5)	61% (23)	21% (8)	5% (2)	0% (0)	38
T9 My campus was prepared for the SFS Upgrade (SL)	28% (11)	41% (16)	13% (5)	5% (2)	13% (5)	39
T10 The training my campus received was adequate	21% (8)	38% (15)	23% (9)	5% (2)	13% (5)	39
T11 The end user training was timely and effective	18% (7)	51% (20)	15% (6)	3% (1)	13% (5)	39

9. Additional comments about “testing, training and quality”

1. T1: Using multiple databases was tricky and annoying at times because of the loopholes that one had to go through to get the security set up necessary to do the testing in the SF88TST database.
T2: Would have been nice if the copy of the queries brought over to 8.8 from 7.5 was updated one more time sometime before the upgrade was to occur. Had to rewrite many queries that had changed or were not written yet in October 2004.
T10&T11: I did not attend any UW System training, but from what I heard from others who did, they did not gain much from it. More in depth training given by the campus had to be done to meet the training needs.
2. Quality - It is very difficult to update trees in 8.8. There is no ability to scroll when viewing and updating trees. PS took a major step backwards in this area.
3. I think we made a good attempt at identifying for the site leaders what each site should test. We made it the site leader's responsibility to ensure that the testing was executed and that issues were identified. However, it was pretty clear at go-live that there was some misrepresentation by certain sites on what they actually tested. Was it better than before - yes. Was it as good as it could have been - no. We can do better next time.
4. It was difficult to know what database to be testing in. During training, the databases seemed unstable at times.
5. Using a database from May 2005 was somewhat problematic because we were unable to identify some problems that would have shown up if a more current database was being used. We were not able to do as much testing as we should have done simply because there were so many problems with the processes that weren't fixed until a week or so prior to the upgrade. An in-house programming expert would have been helpful instead of having a programmer that was learning as he went. We were not able to do as much testing as we should have done. Issues with the processes that were not fixed until October and November made full testing difficult. Changes in the production database that were not captured in the test data base since it was in May did cause some problems that we did not recognize until we were on 8.8. The processes in SFS 8.8 for AR/BI are more cumbersome and time consuming. The slow processing time is also cumbersome.
6. The documentation manuals were not of a high quality. Some information was unclear, some was missing, and some was even untrue. The final product of the manuals was substandard in my opinion

10.SFS Upgrade - General Project

	Strongly Agree	Agree	Neither Disagree nor Agree	Disagree	Strongly Disagree	Response Total
G1 The project goals were clearly understood	22% (9)	78% (31)	0% (0)	0% (0)	0% (0)	40
G2 The project team organization was effective	25% (10)	72% (29)	2% (1)	0% (0)	0% (0)	40
G3 I was proud to be associated with this project	40% (16)	52% (21)	5% (2)	2% (1)	0% (0)	40
G4 The project was successful	40% (16)	57% (23)	0% (0)	2% (1)	0% (0)	40

11. Any additional comments about the project overall:

1. It was fun. I'm glad I had the opportunity to be a part of the upgrade.
2. The individuals assigned to the project were focused and dedicated to a successful implementation from the very beginning. And they transferred that attitude to the campus staff very effectively. Constant attention to strengths, weaknesses, opportunities and threats helped make the upgrade a success.
3. The AR/BI portion of the project was finally totally working as of 1/25/06, almost two months after the rest of the project. We understand that these modules are not well constructed, but more time should have been spent on these modules in the spring of 2005 so that the everything could have been tested before the conversion. I know that everyone worked very hard to make this upgrade project happen, it was not a pleasant experience for the AR/BI modules. There were miscommunications and misunderstandings in regards to what was working and what was not working.

12. Were there aspects of the project you felt would have been improved if there was additional time?

Yes 48% (19) No 60% (24)

13. What improvements do you feel would have been made – had there been additional time?

1. Not so much improvements but other issues could have been handled before the upgrade, such as withholding vendors having duplicate withholding addresses after the upgrade.
2. Sufficient testing could not be completed because of issues that were not resolved before the upgrade took place. If there had been additional time, issues could have been resolved in sufficient time that thorough testing could have been completed before going live.
3. Analysis of the consequences and long-term viability of an AR/BI customization vs. using the product as designed. More monitoring of critical campus testing (particularly for the use of AR/BI)
4. The nightly batch-processing schedule should have been run for several months to prove its reliability and resolve some of the problems caused by the new PeopleSoft programs. Instead, we are having to

deal with these problems in production, and ask our customers for patience. The only good thing is that we have several months to resolve these problems before fiscal year end.

5. More work that was delayed could have been done before the upgrade rather than trying to catch up after the upgrade
6. Additional testing in AR BI. This would have led to the ability to determine whether to customize or reconfigure 3500+ accounts manually to be able to use the system as delivered. Additional testing in PI, 1099, w-2s. Better understanding of commitment control and encumbrance/wisdm problems.
7. Some of the bolt-on and subsidiary processes could have benefited from a bit more time. However, they did not impact the core functionality of SFS. The system was fully capable of writing POs, writing checks, and processing journal entries. I think the accts receivable system could have used some more time. But it probably also benefited from moving into production to iron out some of the issues it faced. Moving AR to production made resolution of issues a greater priority, which was likely a good move. I don't know that the team has been given an update on the status of AR since go-live.
8. Adding additional functionality available in 8.8 that was not available in 7.5.
9. The time for the go-live data conversion was too long. We could have learned from other institutions' upgrade experience and been prepared well in advance.
10. AR/BI would have been a smoother transition. KK encumbrance issues might have been identified. Key people would not have been quite so burned-out at the end of the project.
11. The nightly batch schedule, and other batch processes, should have been run nightly for 3-6 months.
12. The Accounts Receivable - billing functionality for Extension would have been improved. The ZBA reconciliation functionality would have been in place.
13. More overlap between the technical and functional staff and teams.
14. More instruction and better understand of responsibilities at the beginning of the project.
15. Modify screens. Modify number of steps needed to complete a process. Provide more information on the benefits or detriments of the upgrade.
16. Better documentation prepared. Some of the fitgap omissions could have been found. More testing time (there is never enough testing time...)

14. What did you like best about this project or team?

1. I liked being able to test most things out for myself and see how the system was working well before going live with it.
2. Open communication about what's going well and what was not.
3. Open discussion on best options for database downtime while the upgrade was being executed and impact on campuses' processing
4. Good web site. Good communication.
5. The open communication and availability of the project team.
6. Its success. Its organization. Its communication. The commitment of the people working on it.
7. The organization of the project seemed to fit the complexity of the university environment. This group, System Admin, Campuses and DoIT, work together to solve problems. The staff is dedicated to their jobs. Finger pointing is frowned on. The atmosphere provides the free exchange of ideas, which is extremely important in a technical environment like this where the products don't always work as expected.
8. Everyone seemed to work together great with most everyone being respectful of others even under stress and a very tight schedule.
9. It was a nicely complex project with a bit of an unrealistic timeframe - that combination is simply irresistible to me. It was a great team to work with. I especially liked the opportunity to get to know the folks from the campuses.
10. Everyone was pulling in the same direction. Cooperation was a strong trait of this team and project.
11. Being involved in the project helped to know what was going on and learn more about how SFS works

12. I wasn't involved very much with the project team. I did appreciate the open flow of communication that kept those of us who weren't integrally involved informed.
13. Everyone was focused and dedicated to a successful upgrade despite the external events that were impacting the process. The base knowledge of the team derived from team members that had served on the initial installation of SFS and had worked on the 7.5 upgrade. This created a really great advantage. In addition, we were able to bring Theresa back as a consultant. Her background and knowledge greatly enhanced the project. I also don't recall any complaining or whining about problems that surfaced. Problems were expected and welcomed as challenges that needed solutions. The appropriate staff were assigned to seek resolution or in some cases problems were escalated to PeopleSoft. And finally, the extra hours on evenings and weekends put in by the staff should not go unrecognized. It was a reflection of their dedication to success!!!
14. It was challenging, but rewarding
15. It was very well organized.
16. Good project planning that included all system interfaces.
17. The "CAN DO" attitude.
18. Open communication
19. We all worked together, and we freely exchanged ideas to solve problems.
20. Feedback and responses were timely. I felt I had many questions and the project team answered them promptly and were very friendly even though they must have had the same question 20 times!
21. Tina and Elise were both very open to any questions or issues we had and making sure they were solved or explaining what was being done to correct issues. They also never made you feel foolish for asking questions.
22. I was impressed by the commitment of the function project team and the technical project lead.
23. The dedication and commitment to success of the participants.
24. Being part of knowing what was going on as it fit my role and responsibly of the Upgrade for our campus.
25. Team worked well together.
26. The coordination of all involved was impressive.
27. Very organized
28. Project leaders availability and willingness to answer any questions and assist you through any process. The ease in working with any upgrade team member.
29. Very well organized and clear and truthful communication of what was happening.
30. Timely response to issues.
31. KEEPING CAMPUSES INVOLVED.
32. The team structure. Elise's project management skills were awesome. There was a lot of ownership by the campuses because of their involvement in the site leaders team.

15. What did you like least about this project and/or team?

1. That I wasn't really involved until the later stages of the project.
2. I didn't feel enough attention was paid to issues when they were brought out until it was too late to resolve them and test the resolution completely before the upgrade.
3. Fuzziness regarding the roles of UW-SA staff vs. DoIT staff. Should be clarified.
4. Time consuming while performing other job duties.
5. The stress.
6. The business processes surrounding the upgrade were not well defined. Defining roles and responsibilities would help get the work done in a more efficient manner.

7. What I liked least about the team is we had people dropping out in the middle and also not everyone was working up to their potential.
8. Roles not always clearly defined. Process not always consistently followed
9. There were a couple of people who didn't hold up their end of the bargain. That happens on all teams and all projects. I feel sorry for them because they are the ones who lose out on the opportunity to learn and the chance to be a part of a team.
10. Patches installed in mid upgrade caused some processing problems.
11. Sometimes we felt that that some of the members of the UWSA upgrade team were in over their heads and/or did not have a good understanding of the project. Too many things were missed or misunderstood from PeopleSoft (i.e. - time for the move to production, how commitment control worked, etc.). There are always going to be surprises, but the number of them was high compared to other installations I am familiar with.
12. I have absolutely no strong or memorable dislikes.
13. We didn't have enough parties to celebrate all the milestones we achieved.
14. There seemed to be too many layers of management (Executive Sponsors, Steering Committee, etc.) for this project.
15. There was one individual that I don't feel added any value to the effort. In fact, that probably ended up decreasing the validity significantly.
16. DBAs should have had a better understanding of data conversion and the upgrade path in the earlier stage of the project. Many institutions had gone through the upgrade and had provided first hand insight and lessons learned to HEUG. An upgrade data conversion strategy should have been developed well in advance to shortened the go-live process. Instead we were still getting "surprises" during the last few weeks of the upgrade.
17. Every major project involves issues and hurdles where conflict occurs. The difficult times occur when the problems pull people apart and they start pointing fingers at each other or taking out their frustrations on other team members. There were very few of these times.
18. I, personally, wish I had more time to contribute to the overall training manuals. However, personal events kept me from playing a bigger role! It was a great project and a very successful one at that!
19. Some times the lead people don't take the end users concerns serious and the importance of some issues.
20. Flexibility of the deadline.
21. All day meetings.
22. No comment
23. My feeling was that the Steering Committee was very willing to get engaged to the degree that was needed to make the project a success. I felt that Elise add some much needed organizational skills to the project and without her the project would not have been as successful.
24. Insufficient information about the benefits of the upgrade.
25. I got the impression that relationships at the project management team level (UWSA staff) was not smooth and that there were some friction points. I do not know what they were, but the lack of cohesiveness and agreement at their level was obvious to the rest of us. I don't know whether it materially affected the outcome of the project. It may very well not have, but it's possible

16. How would you improve this project for future upgrades?

1. Keep upgrade website up to date as best as possible, even after the upgrade is complete. Refresh queries from current production database closer to implementation date, or let all query writers know when the snapshot is going to be taken, so new queries can be written in both the current production and test upgrade database.

2. Get additional training for members of teams so that they can complete their jobs more efficiently. 'On the job training' is like the blind leading the blind in a project with timelines like this one had.
3. Adherence to a "no customization" approach. Better role definition for core team individuals.
4. Don't know.
5. Written definitions of roles, responsibilities, and business process for the upgrade that can be shared by everyone on the project team. Once these are written down, they can be utilized for future upgrade and additional projects.
6. My involvement was delayed because of two other critical projects that I had to complete. So I started behind. So try not to schedule multiple critical projects at the same time we're doing a major upgrade.
7. Possibly hiring consultants where needed, resources seemed scarce, better communication all around.
8. Clearer role definition and defined process understood by all. Resource allocation commitment.
9. Next time I would have more campus involvement in planning. I would revise the issue tracking process and automate it more - it was a bit painful keeping up with the paperwork.
10. I do not know the dynamic at UWSA, but it seemed like staff utilization on the project was poor. Possibly not the case but everyone seemed very stressed out. Maybe we lacked the appropriate competency levels for the team or the right mix of skills. Someone closer to the team should be assessing this.
11. Since each campus uses SFS differently, I feel having UW-system wide training may have created more anxiety for some. The training wasn't specialized enough and it didn't address some everyday functions for those of us in accounts payable at UW-Madison.
12. I don't have any specific suggestions because each upgrade is unique. At the time a decision is made to upgrade, an evaluation has to be made of all the factors that are involved, internal as well as external. The type of upgrade, major vs. minor, will also impact the approach. The team concept with sponsors and external review made the team focus on success and alternatives in spite of obstacles.
13. Bring in consultants that are experts in needed fields (i.e. new technology) to speed up the implementation process.
14. I would prepare campus manuals to the best of my ability.
15. DBAs should go to PeopleSoft Tools training classes to better understand the upgrade path.
16. Get more information before the upgrade begins from other installations or PS or training classes so that the effort required to complete the upgrade is more closely aligned with timeline. Several people worked extraordinarily hard and long to make this upgrade happen.
17. There also needs to be a stronger understanding of the inter-relatedness of the work and knowledge done by the UWSA support staff and the DoIT development staff. Testing processes would be another area where improvements could be made.
18. I would have worked a little more with the office support at our campus. List the tasks and amount of time they would take, after which a deadline would be estimated.
19. I don't think it could be improved upon.
20. Have a more detailed project plan from the beginning even if it's way off.
21. Potentially move some of the meetings out of Madison
22. As early as possible layout and communicate the plan and responsibilities.
23. Cost/benefit analysis with input from all team members.
24. Make sure that no major issues are missed in the fitgap. Keep the team structure. Improve the documentation

17. Any additional comments about this project?

1. Overall, the various teams did an incredible job. Kudos to all.
2. No.
3. I think this project was a success but there were a lot of lessons learned. Without the hard work of so many who wanted to see this project succeed, it would never have happened.
4. Let's do it again.

5. The training manuals for the various functional areas seemed weak, especially for the amount of lead-time that was spent on some of them. I was told that several months was taken to develop some of the manuals yet operational staff had difficulty following them and, in some cases, had to write their own. Sounds very inefficient. Author(s) may have lacked functional or operational experience. Did we have the right person or were we giving someone a job? Next time we should consider people in the field having more input into the manuals. This most likely caused a lot of wasted time for the UWSA staff and added to their workload stress.
6. EVERYONE DID A GREAT JOB. From the sponsors all the way down to the LTEs at the campuses that work part-time on the system, it was a great effort that we should all be very proud of. It would be great if there was some way to reward each and every one of them in some special way for the part they played in the success of the SFS Upgrade.
7. The UWSA staff did great work to bring up this project; it was great to work with them and their 'get the job done' mentality. The project management team of Tina and Elise were effective in dealing with issues and spreading communication to people that needed to know in a timely fashion.
8. Excellent! Very Successful! Committed people working together made it happen.
9. I feel the project team was on top of the job that had to get done. Good Work!
10. No, it was a great success.
11. Excellent job overall and a great success!
12. I appreciate the overall effort of all involved and the successful completion of the upgrade