

Fermilab Oracle Time & Labor (OTL) Integration

3/11/2009

Project Scope

Objectives

- Implement the Oracle Time and Labor (OTL) system and fully integrate OTL with the laboratory's financial management systems (Oracle Projects and PeopleSoft).
- Reduce overhead for managers and staff by eliminating the duplication of effort associated with creating and feeding individual labor tracking systems and processes.
- Reduce the business risk of dependence on specific individuals by providing a common base of vendor supported tools and standard processes.
- Enhance the control and status reporting capabilities of labor by providing standardized, accurate, easily accessed, and understandable labor information.
- Provide a repository of labor cost data that will provide a long-term institutional memory of this information.
- Provide an intuitive, web-based interface for time entry and approval based on the laboratory's requirements that improves the ease and accuracy for recording time.
- Support time entry needs for multiple types of users.
- Implement a time recording system that has configurable layouts, validations, and approvals.
- Establish OTL documentation, training, and skill standards.

Goals

- Implement OTL on time and within budget
- The transition to OTL will be non-disruptive to laboratory operations and projects.
- Fermilab's standardized OTL process will be utilized consistently across the laboratory.
- Ability to evaluate plan versus actuals down to the task level in the WBS for greater control and performance status of projects.

Deliverables

Design, Development, and Implementation Phases

- Updates to the Project Charter for each phase.
- Implementation plans to support a phased implementation
- Final Gap/Fit Analysis
- Implement an OTL system as set forth in the requirements document.
- Integration with existing business systems
- Standardized test cases for OTL
- Standardized user documentation including a web based software procedural documentation repository aimed at encouraging standards in the use of OTL
- A standardized training program for OTL.

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Critical Success Factors

- Final phase of the project will be implemented before the end of the 2007 calendar year.
- OTL is used and accepted by the entire laboratory. While this is a factor that cannot be measured at the close of the project, it can be measured in the year after implementation, and is ultimately the responsibility of the core team since they represent the field.

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Time Frames

- Interface design and system configuration completed by the end of February 06.
- First pilot implemented by the end of June 06.
- Final pilot implemented by the end of December 06.

Stakeholders and Customers

- Weekly and Monthly Employees
- Fermilab Project Managers
- Level 2 & 3 Managers
- Field Budget Officers
- Schedulers and Cost Estimators
- Directorate
- Accounting
- Business Systems

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Project Resources

Project Organization

Executive Sponsor:

Bruce Chrisman

Project Manager:

Brad Trygar

Core Team (some are still in the process of being confirmed):

Division/Section	Member
Computing Division	Irwin Gaines
Technical Division	Ladaune Trierweiler
Accelerator Division	Barb Fetzner
Particle Physics Division	Colleen Yoshikawa Terry Grozis
ES&H	Elizabeth May
FESS	Pat Lesiak
Business Services	Brad Trygar Cheri McKenna Mike Kaiser Ron Pahl LindaSue Smith James Wollwert Debbie Griffin
Directorate	Denise Keiner
Lab Services	Linda Christiansen
Integration Partner	Dino De Los Santos

Since we are implementing OTL in Phases, the composition of the core team may change based divisions/sections included in the current pilot.

Management Committee:

The members of the Management Committee for this phase are still being determined. The following were members on the Management Committee from the last phase of the project:

- Bruce Chrisman (Chair)
- Brad Trygar
- Dave Carlson
- Cindy Conger
- Rich Karuhn
- Ellie Arroyo

Note: Roles and Responsibilities of the organization are in Attachment 1.

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Project Risk

Project Assumptions

- Project core team member time requirements for completing the project on schedule are consistent with competing time demands on team members.
- Adequate funding will be provided.
- No labor history will be converted.
- File imports will not be supported. All time must be directly entered into the OTL system.

Key Issues

Issue	Issue Description	Strategy
Core Team composition	Do we need a core team representative from each of the division and sections?	Yes, and representatives from all divisions/sections have been identified.

Identified Risk Events

Risk Event Description	Potential Ramifications	Potential Occurrence (H/M/L)	Impact to Project (H/M/L)

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Project Reports
Report Type

Report Distribution

**Date Required /
Frequency**

Management Committee Status Report

Management Committee

Biweekly

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Attachment 1

Project Roles and Responsibilities

Executive Sponsor

Roles:

- Project Champion
- Removes roadblocks
- Policy setter
- Promulgates the project charter

Responsibilities:

- Chairs Management Committee

Project Manager

Roles:

- Integrator of the project and operations
- Plan, control and evaluate of all project activities
- Organize the project team, coordinate tasks and allocate resources
- Decision maker
- Implements the Project Plan
- Communication hub of the project
- Leader of project team
- Negotiates and resolves problems

Responsibilities:

- Prepare and maintain Project Plan.
- Manage all project activities
- Manage and maintain project Budget.
- Build and maintain teamwork.
- Monitor and communicate project status.
- Identify and resolve technical and functional problems.
- Chair Core Team meetings.
- Identify and resolve deviations from plan.
- Escalate issues that can not be resolved at Project Manager level to the Sponsor with recommended options.
- Provide timely and accurate project information.
- Resolve conflicts.

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Core Team

Roles:

- Representative to the Core team for their respective organizations' interests
- Provide ready access to subject matter experts in their organizations as required by the project
- Procure time and resources in their organization for accomplishment of various core team tasks, such as application testing, creating documentation, teaching, and research.

Responsibilities:

- The core team is the primary implementation group. As such, they are ultimately responsible for representing their respective functional areas for required decisions, obtaining resources, and providing information from the project back to their departments. The project manager will assume that decisions made by the core team reflect the wishes of their respective management.
- Attend Setup And Use training (up to 10 training days). Spend hands on system time to get familiar with the Oracle Applications.
- Act as a trainer and liaison to others in their functional areas.
- Assist with application prototyping, which involves putting Fermilab's business rules into the Oracle software. This will be an intense process, in session for 3 days of each week, with one day reserved for issue resolution and coordination. Everyone on the core team needs to attend throughout this phase to insure that conflicting needs are identified and resolved.
- During prototyping, the core team is charged with the identification of business issues and recommending a solution. If a customization to the system is recommended, the appropriate core team member will be responsible for creating a business case justifying the customization.
- Bringing in the appropriate member of their business area in a timely manner when needed for prototyping decisions.
- Creation of data validation test plans, coordination of data validation testing.
- Creating system test plans, coordination of system testing activities.
- Creating parallel testing plans, coordinating the execution of parallel testing for their business area.
- Coordination and testing of the reports generated as part of the project.
- Creating a documentation plan (outlines), creation of user procedural documentation.
- Creating a training plan (training outlines, coordination of training rooms), for user training for their business area. The project will fund training of trainers in each major functional area. Those individuals will be responsible for training the other users in their areas.
- In addition to other project responsibilities, the core team will need to attend weekly team meetings. These are critical coordination sessions focused on issue identification and resolution. Meeting times will vary with the number of open issues.
- Time required will vary with the phase of the project, but will be heavy during prototyping, data conversion, and at times when customizations and reports are delivered. The core team is responsible for assuring that the deliverables due from their areas are on time and to the quality standards of the project.

Management Committee

Roles:

- Provide assistance with administrative issues facing the project
- Provide assistance with resource issues
- Decisions on issues outside the authority of the core team.