A Collaboration Story: Cross-departmental school-wide development project

IT Professional Conference

5/31/2018
Background

- Before PeopleSoft HRS was installed, 3270 mainframe and EPM (Enterprise Performance Management)
- Large departments in SMPH had needs that were not met by the standard HRS
- Features like faculty tracking, volunteer and UWMF staff tracking, tagging, key word searches and reporting
- Faculty Roster Database built in Filemaker then upgraded to PHP with MySQL – Over 15 years old
- Each department with SMPH controlled own IT staff, budget and project approvals
Where we stand today

- Several major departments have their own customized HR supplemental system (Medicine, Family Medicine and Department of Surgery)
- For those units that do not have one of the three listed above, Surgery or Family Medicine system will be rolling out a temporary solution (64 departments and centers)
- A statement of work was approved in November 2017
- A new project was launched in January 2018
- Sponsored by Ken Mount and Brian Gittens
- The goal is that all of SMPH will be on one shared system
Data Flow
Multiple Phase Approach

Phase I
- PIMS Expands
  - Administrative Units
  - Basic and Applied Sciences
  - Institutes and Centers
  - Outreach and Support Offices
- Surgery HR
  - Clinical Departments
- Exceptions – some already in progress
  - Neurology & Neurological Surgery – PIMS
  - Orthopedics – Similar to Surgery
  - Radiology - PIMS

Phase II
- One system to support all departments
- Establish team to gather requirements
- Establish process and workflow
- Understand and prioritize what is needed for new system
Meeting Structured

- Executive Sponsor Meeting every 6-8 weeks
- Technical Team meetings once every other week
- Agenda, Notes and Status Reports used for communication of progress
- Ad hoc meetings for special data request from UW Health
- Training resources for rollout
- Training session last from 1 to 2 hours
Training and Rollout

- Training has been conducted in each department
- PeopleSoft HRS changes feeds to each system by the next day (no changes in supplemental system flows back to HRS)
- Access is controlled to limit information available to different type of roles in the system
- Currently working to provide information from UW Health and Medical Foundation employees to new departments
Status of Rollout as of May, 2018

Status by Area

Administrative
- Already On

Clinical
- Already On
- Testing
- NotScheduled

Basic & Applied Sciences
- Already On
- Testing
- NotScheduled
Current Development Approach

- Shared development staff from multiple units
- Frequent user input from key stakeholders
- Technical communication using Microsoft Teams
- Weekly development status meetings
- Source code control using Github
- Task tracking use PivotalTracker
- Project Storage using Box
- User communication using WiscList for email
Challenges along the journey

- Data feed from UW System for HRS
  - Limited window to load data
  - Duration and time to load data
  - Changes to access

- Data feed from UW Health include Medical Foundation
  - Existing feeds for some departments
  - Making sure we have proper security and technical attributes to restricted data access

- Data feed from Faculty Roster Database
  - On-time load and reconciliation of key dates with PIMS
  - Pulling additional information into PIMS regularly

- Departments with nothing are either hesitant or can’t wait to start using this

- Support model for both systems
Lessons Learned going forward

- Develop project charter to define scope
- Spending more time gathering and prioritizing requirements will help control scope creep
- Be able to say no to scope creep
- Involve stakeholder earlier and often
- Establish budgets and how share cost for resources
- Bring a flexible and collaborative attitude
Panel Discussion Outline

- The three of us will be in front of room to answer questions from audience
- Write questions on index card and pass cards to end of row
- Cards will be collected and brought to front of room