

Deltek
INSIGHT
2015

CP-28: Customer Spotlight: AECOM
Mission Possible: Fast Track
Costpoint Database Merge

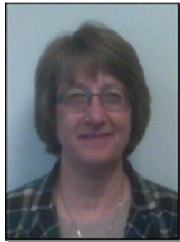
Presenters: **Linda Miles, AECOM**
 Susan Pucciano, Lexell Blue Consulting

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Agenda

- Introductions
- The Mission
- Project Background and Scope
- The Approach
- The Team
- The Good, the Bad and the Ugly
- Key Lessons Learned
- Questions?

Introductions



Linda is Director of Business Systems Knowledge Management at AECOM (formerly URS Federal Services). Her background includes 20 years as accountant, controller and CFO for defense contractors and mid-size businesses. She has spent 15 years implementing and managing Business Systems, and has served as program manager and/or project director for more than 10 major accounting systems implementations. She is responsible for financial business process analysis and improvement, including new contract implementations and leads a team providing application delivery of the Federal Services ERP and subsidiary systems. She is skilled in General Accounting Management, Government Accounting Management, Business Systems Management, Business Intelligence Systems Design and Management, Program Management and Business Process Analysis and Design.

Linda has a BS in Accounting and an MS in Business Administration.

Introductions



- Lexell Blue, LLC headquartered in Northern Virginia
- Comprised of four partners and a team of consultants with extensive experience with the Deltek GovCon suite of products
- Costpoint consulting services
 - CP / TE Implementations including Project Manufacturing
 - Data Migration, Merges, Restructures, and Splits
 - Extensibility
 - Interfaces
 - Reporting
 - Product Installations
 - Product usage assessments



The Mission

- Merge two large CP databases
- Both CP 7, but one MSS and one Oracle
- Foundational design and usage of Costpoint very different
- Mid-year conversion
- Limited resource availability
- Timeline: FOUR months

MISSION: ~~IM~~POSSIBLE

Project Background



- AECOM acquired URS in October 2014
 - Both companies government services business operating on Costpoint
 - AECOM business for government services was about a quarter the size of the legacy URS business
- Decision made in January to integrate AECOM Costpoint into the legacy URS Costpoint
- Decision made in January to accelerate the integration as a mid year delivery
 - Coincide the system integration with the business process integration
- Legacy URS business has successfully completed seven system integrations over 9 years
 - Two were mid-year conversions
- The schedule of this integration was by far the most aggressive and largest integration ever tackled

Project Scope



- Merge two large Costpoint 7 databases (MSS into Oracle)
 - 4000 employees from MSS DB added to 12,000 existing employees in Oracle DB
 - 3500 vendors from MSS DB added to 50,000 existing vendors in Oracle DB
 - 300 contracts from MSS DB added to 2600 existing contracts in Oracle DB
- Change in FY calendar with stub year prior to conversion
- Data Conversion – restructure and merge; over 50 crosswalks and over 160 tables.
- Reporting – 35 new reports, 8 existing reports modified
- Interfaces – 30 new interfaces; 15 existing interfaces modified
- Other initiatives associated with integration of URS/AECOM
 - Not part of CP merge project, but impact on overall team/timeline
 - Oracle EBS Integration
 - ADP upgrade
 - Financial Planning Reporting System Integration
 - Corporate Consolidation Integration

Project Schedule



- Kickoff/requirements gathering last week of January
- First conversion/integrated test – mid-March
- Second conversion/UAT – mid-April
- Staggered Go-live – final cutover mid-May
 - Wave1 to support forward planning/pricing – April 25
 - Wave2 to support opening Time and Expense – May 5
 - Wave 3 main conversion – May 18

The Approach - Traditional



- Internal leadership/SME as drivers
- Majority of work performed by in-house resources
- Merge summary level “beginning balance” type data
- Use of preprocessors and externally generated files
- No prior year detail history
- No fixed assets
- All had been on same calendar
- No PROJ_SUM/PROJ_BURD_SUM (build vs. convert)
- Longer time frame (6 months to a year in the past)
 - Two previous mid year were over 6 months

Our Approach



- Leveraged fact that it was a CP-to-CP merge to convert more data/more detail
- Still limited to active projects, summarized prior year costs
- Utilized proven ETL process to
 - Extract directly from MSS source
 - Load to Oracle working tables to apply filters, mapping, other logic
 - Transform and load to final CP tables
- Consultants owned crosswalk preparation
 - Consultants perform initial mapping and lead crosswalk review/completion meetings
 - AECOM reviewed and approved final crosswalks
- Consultants owned data validation and testing
 - Define plan and review with AECOM team leads for approval
 - Execute and document validation and testing, with support from AECOM
 - AECOM review and sign-off on test results

The Team



- Teams organized based on Costpoint system structure rather than business structure
 - Team leads from both URS and AECOM partnered with consulting lead for that area
 - Insured the correct expertise from both consulting and business side
 - SMEs for each area included IT lead as well as functional experts
 - Consultant leads drove the process
- Structure of the team included individual teams and working groups
- Professional program manager
 - Not just an IT lead
 - Managed communications, scope, escalations more effectively.
- Cross functional teams
 - Program manager and functional leads
 - Challenge: requires significant time to stay informed

The Good – What Worked?



- Strong senior level management support of project
 - Approved funding, changes, timing effectively
- Experienced, knowledgeable team leads and SMEs (internal and external)
 - Responsive, solution-seeking
 - Authorized and willing to make decisions
- Strong PMO and leadership team
- Onsite kickoff week meetings
 - Got team working together well and quickly
- Overall good communication and use of meetings
- Consultants take more of the leadership role vs. the internal team
 - Direct activities – have the expertise and the time
 - Allowed internal team more time to do their day jobs
 - Consultants control and maintain crosswalks with AECOM review/approval
 - Consultants prepare, execute and document data validation and testing

The Good – What Worked?



- First acquisition integration where all reports were ready at go-live
 - early analysis and review
 - good controls and tracking
- Consultants did a great job maintaining their documentation for audit support
- Technical team had functional expertise and product knowledge
 - Not just techies
 - Understand system impact of decisions
 - Better pre-validation
- Bigger emphasis on surviving system business processes staying in place
- Effective working sessions on direct projects and accounts
 - XW mappings were well done in these areas
- Bringing up TESS and Payroll went very smoothly

Room for Improvement



- More cross-functional team involvement in mapping so all requirements considered
- Confirm all team leads have appropriate leadership skills (or mentor)
- Confirm SMEs have appropriate knowledge
- OCM – better and earlier communication of changes in business process
- Mitigate loss of historical knowledge base with appropriate incentives to keep people through project
- Integration of management/leadership early in process to ensure a single voice for decisions and direction
- Require more front end education of team on both system's utilization of standard functionality – don't assume "Costpoint is Costpoint"
- Look early and in-depth at data for clean-up needs and corrective action on provisioning system

Room for Improvement



- Ensure Internal staffing/leadership review of crosswalks was completed effectively
- Place more emphasis on front end design
 - Development of crosswalks for the Pillars of Costpoint
 - Rushed thru crosswalks due to timing
 - Orgs in particular were an issue, indirect projects (differences in how accts/orgs used)
 - Pools – all about the orgs
- Overall more concentration on documenting results for audit results
- Confusion on timing of billing out of legacy system at cutover (behind due to system crash and not understanding how to bill and when)

The Ugly



- System crash go-live week delayed final cutover
 - System down for a week with incomplete restore
 - Legacy AECOM off line for over 2 weeks
 - Rework required after restore to catch up final close activities
 - Reduced time for validation/reconciliation
- Scope changes late in project
 - Decision to convert current year project ledger at go-live
 - Understanding JVs and significant use of IWO process
 - Finalization of pool design
- Late identification of legacy data anomalies
 - Many override mapping rules to correct legacy POA charging
 - New, complex mapping requirements identified and implemented at go-live
 - Many reconciliation issues resulting from mappings that could not be tested previously

Key Lessons Learned



- Successful model using consultants to drive the process – met the deadline
 - Insure internal team takes proper accountability
- Better evaluation of project complexity up front
 - Setting more realistic schedule and timing
- Manage expectations of corporate senior leadership
- “Don’t let perfection stand in the way of progress”

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Questions?

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