Simplifying change management in government

Indiana Office of Technology streamlines changes to its financial system with Stat® for PeopleSoft

Quest™

BUSINESS NEED

Indiana Office of Technology had a highly manual process for making and tracking changes to their statewide PeopleSoft financial management system. They needed a solution that allowed them to create a single system for streamlined financial processing and reporting, and provided greater financial visibility and better accountability for decisions across state agencies.

SOLUTION

The team selected Stat for PeopleSoft, a version control and change management software solution that provides organizations with increased visibility into — and control over — the change process.

BENEFITS

- More visibility into and control over the change process

- Precise monitoring of environment refreshes during all phases of production

- Automation of patching and simplified change tracking durinng application development and production

SOLUTIONS AT A GLANCE

- Stat for PeopleSoft

"Stat was a good choice because it put approval systems into place and does a good job of communicating what's going on. We didn't have an official process before, and now that's all locked down."

Jeff Chaney, Deputy IT Director, Indiana Office of Technology

When Indiana set out to implement its statewide PeopleSoft financial management system — Enterprise Common Processing and Analytics Systems, or ENCOMPASS — the goal was to create a single system to streamline financial processing and reporting, and create greater financial visibility and better accountability for decisions across state agencies. However, a largely manual and unruly process for making and tracking changes to the system was hindering this goal.

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>
> *Jeff Chaney, Deputy IT Director, Indiana Office of Technology*

"Throughout the last few years, we have run into some issues with changes that were put into the [financial] system that adversely affected the entire system for the state," said Jeff Chaney, deputy IT director for the Indiana Office of Technology (IOT). "We had a fairly manual process before, and changes were sometimes made in development or in test environments, and there weren't stringent rules on how things got into production."

Issues arose because there wasn't enough visibility into what changes were being made or how the changes would affect the system's users. IOT invited a group of advisors to conduct a comprehensive overview of its operations and procedures to help come up with a solution. Ultimately, the advisors recommended implementing Stat for PeopleSoft, an industry-leading change management solution offered by Quest Software. The team at IOT agreed.

"We decided we needed some kind of a change management practice to do a better job of making sure we were tracking our changes and getting approval for those changes before they occurred," said Chaney.

WORK SMARTER, NOT HARDER SOLUTION

Stat for PeopleSoft is a version control and change management software solution that provides organizations with increased visibility into — and control over — the change process, allowing them to be more responsive to updates and patches. While offering transparency during the change process, Stat automates patching and simplifies the tracking of changes during application development and production.

"I'm a work smarter, not harder kind of person," Chaney said, explaining the decision to go with Stat. "Before, there wasn't a good line of communication as far as here's the changes we're going to make, here's when it's going in, here's what it's doing." By using Stat, the changes made to Encompass have been "just a lot cleaner," Chaney said. "And, in my opinion, it's a time saver."

Additionally, the implementation of Stat was fast and seamless — in large part thanks to Quest's efforts. "Once we started, it was only two weeks before someone from Quest services was scheduled to be out here," said Chaney. "They were here three weeks. We implemented, trained and deployed in that three weeks, and then [Quest] left and we were using the system. The process was fairly straightforward and simple, and I would say, wonderful for us."

After implementing Stat, IOT was able to precisely monitor environment refreshes during all phases of production, and communicate those changes to a variety of users. "Stat was a good choice for us because it put those approval systems into place and does a good job of communicating what's going on," Chaney said. "We really just didn't have an official process before, and now that's all been locked down."

PRODUCTS & SERVICES

SOFTWARE

Stat for PeopleSoft

Quest

BEYOND MIGRATION

While new solutions like Stat provide big benefits right from the outset, agencies using them can reap even greater advantages by further building on the original functionality. For example, before implementing Stat, IOT ran a very large SQL script when refreshing databases. It was a time-consuming, technical process that required a significant amount of familiarity and expertise. Through an innovative approach and adaptable programming, however, IOT was able to use Stat to streamline the post-migration process to make it easier for non-experts to perform this task. By taking its use of Stat a step further than originally planned, IOT helped simplify its operations and made it easier for users to conduct refreshes.

By performing these post-migration steps, IOT hopes the change management process will be more easily accessible and understandable to a variety of users.

"In theory, a person clicks the button and goes through all of the steps and they should be able to do it without having any significant knowledge of the SQL that's happening behind the scenes, or really even how to stop and restart the People-Soft environments," said Jacob Cazzell, IOT programmer specialist. Now, users not familiar with the application are still able to conduct refreshes when system administrators are out sick, on vacation or otherwise unavailable. "It's a very basic, step-by-step process," said Chaney. "It just goes through the list, and when you're done, it's migrated. It's a process that's 'idiot-proof,' which is great."

ONE SOLUTION FOR OTHER OPPORTUNITIES

While new solutions like Stat provide big benefits right from the outset, agencies using them can reap even greater advantages by further Chaney hopes that Indiana's Stat solution will be extended to other departments and functions in the future. "Right now, we're only using the application for our financials environment, but we'd like to move that to where we're using it for our human resources implementation as well," he said. "We're going to be moving this into all our PeopleSoft environments."

Chaney also hopes that IOT will be able to find opportunities to use Stat and its post-migration steps in situations when the agency needs to reboot its Web servers or clear its cache so that processes are quicker, easier and more streamlined in the future.

"I'm all about saving as many manual steps as I possibly can," said Chaney. "Automating anything that we do through this system is just going to be icing on the cake. Anything we can do to make things simpler, I'm happy with that."

ABOUT QUEST

Quest helps our customers reduce tedious administration tasks so they can focus on the innovation necessary for their businesses to grow. Quest® solutions are scalable, affordable and simple-to-use, and they deliver unmatched efficiency and productivity. Combined with Quest's invitation to the global community to be a part of its innovation, as well as our firm commitment to ensuring customer satisfaction, Quest will continue to accelerate the delivery of the most comprehensive solutions for Azure cloud management, SaaS, security, workforce mobility and data-driven insight.

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