

Project Charter : Pensions I-Connect			
Project Manager		Project Lead	
Matthew Collier		Leo Atkinson-Goffe	
Start Date:		End Date:	
01/01/20		31/08/20	
Objective(s)			
To formally implement and utilise the I-Connect software as purchased by the IWC Pensions department. In turn this will lead to minimising the impact of poor data quality and highlight problem areas. The ultimate goal is to reduce the time spent by the team processing and validating information for Altair.			
For Members to have live monthly up to date information to enable more accurate quotations on our Member Self Service.			
Scope			
In Scope:			
- SAP and the productions of information from SAP		Out of Scope:	
- Admitted Bodies and the return of information		- SAP, as a system and reporting from	
-External Payroll Providers and the return of information		-Previous Data Quality Issues	
Measures of Success			
Key Performance Indicators			
KPI 1	Testing phases completed to deadline	Achieved?	
KPI 2	The return of information from SAP to monthly deadline		
KPI 3	Data quality checks carried out to monthly deadline		
KPI 4	Return of information from External PP to deadline		
Overall Approach			
Key Activities		Due Date	
1 Complete initial project plan and ascertain projected timescale			
2 Set up testing matrix for use immediately			
3 Devise a communications strategy for Admitted Bodies and External Payroll Providers			
4 Set up a "guinea pig" external site- suggested IW College			
5 Collate results of test site and implement improvements/ guidance			
High Level Risk Analysis			
Indicators	Risk	Controls/Mitigation	Rating
Testing and information quality	Non-completion of effective testing	Ensure training matrix is thorough and adhered to	High
Non-completion of project	Time and money spent in development	Ensure project runs to timetable	High
Rushed Project	Inadequate testing and botched cause further issues down the line	Ensure time management is addressed and involve those required	Medium
Follow up on issues raised	Issues raised are not dealt with and a "snowball effect" with data is created	Ensure an issue log is kept at all times and that full resolution is sought.	Medium

I-Connect Project- Task Schedule

Main Tasks with individual actions		04/03/2020	Start Date	End Date	Status	Ownership	Area	Comments/Actions
			01/01/20	31/08/20	On Target			
1. Testing (SAP)								
1.01	Design testing matrix for SAP output	Green	01/01/20	19/01/20	Complete	Leo Atkinson-Goffe	IWC Payroll	
1.02	Design testing matrix for external providers (Ensuring Spec requirements are correct.)	Green	01/01/20	19/01/20	Complete	Leo Atkinson-Goffe	IWC Payroll	
1.03	Liaise with Payroll to identify any further testing scenarios	Green	01/01/20	20/01/20	Complete	Leo Atkinson-Goffe/Christine Walker	IWC Payroll	Scenarios sent over 10/02/2020
1.04	Review Pensionable Wage types and update if appropriate	Green	01/01/20	31/01/20	Started	Leo Atkinson-Goffe/Pensions Team	ICT/Absoft	Conference call discussion
1.05	Request access to SAP team for other members of the Pensions Team to ensure resourcing correct and support available	Green	01/01/20	31/01/20	Complete	Leo Atkinson-Goffe	ICT	
1.06	Execute testing phase	Amber	20/01/20	28/02/20	Started	Leo Atkinson-Goffe	IWC Payroll	
1.07	Testing phase - allocate SAP numbers to scenarios, review against IWC file and identify any discrepancies	Green	20/01/20	24/01/20	Complete	Leo Atkinson-Goffe/Christine Walker	IWC Payroll	Received from Payroll 10/02/2020
1.08	Send any discrepancies to ICT/Absoft	Green	27/01/20	07/02/20	Started	Leo Atkinson-Goffe	ICT/Absoft	Sent first set of issues to absoft 10/02
1.09	Testing of solutions	Red	10/02/20	14/02/20	Delayed (See Comments)	Leo Atkinson-Goffe	IWC Payroll	Awaiting Absoft response - glen to update by 21/02
1.10	Agree escalation process should solutions not be forthcoming	Red	17/02/20	28/02/20	Delayed (See Comments)	Matthew Collier	IWC Payroll	Absoft to update current issues by 04/03
1.11	Creation of procedure guide for regular monthly processing	Amber	17/02/20	28/02/20		Leo Atkinson-Goffe/Chloe Lake	IWC Payroll	Started - Can be found pensions - iconnect - guides

I-Connect Project- Task Schedule

Main Tasks with individual actions		04/03/2020	Start Date	End Date	Status	Ownership	Area	Comments/Actions
1.12	Final Absoft sign off		01/01/20	31/08/20	On Target	Leo Atkinson-Goffe/Absoft	ICT/Absoft	
1.13	Schedule and document monthly process within Payroll process		28/02/20	28/02/20		Claire Sarr/Gemma Stevens	IWC Payroll	
1.14	Handover to Payroll Staff		02/03/20	03/03/20		Leo Atkinson-Goffe	IWC Payroll	
1.15	Update Matthew Collier and Claire Massiter of first stage completion.		03/03/20	03/03/20		Leo Atkinson-Goffe	IWC Payroll	
2. Testing and sign off in Altair								
2.01	Utilise testing matrix and undertake thorough testing in Altair test	Amber	09/03/20	13/03/20	Started	Leo Atkinson-Goffe	IWC Pensions	
2.02	Upload first month's data and perform data quality exercises as require		16/03/20	20/03/20		Leo Atkinson-Goffe/Pensions Team	IWC Pensions	
2.03	Finalise all data quality issues and sign off with Heywoods		23/03/20	31/03/20		Leo Atkinson-Goffe	IWC Pensions	
2.04	Create processing guide for Pensions staff		30/03/20	31/03/20		Leo Atkinson-Goffe	IWC Pensions	
2.05	Update any monthly work plans to include I-Connect as a regular task		30/03/20	31/03/20		Leo Atkinson-Goffe	IWC Pensions	
3. Admitted Bodies "Roll-Out"								
3.01	Identify and Create List of current employers	Green	01/01/20	19/01/20	Complete	Leo Atkinson-Goffe	IWC Pensions	

I-Connect Project- Task Schedule

Main Tasks with individual actions		04/03/2020	Start Date	End Date	Status	Ownership	Area	Comments/Actions
3.02	Identify key contacts within each employer and method of return	Green	01/01/20	31/08/20	On Target	Leo Atkinson-Goffe	IWC Pensions	
3.03	Execute employer onboarding (See Employers Tab)	Amber	01/01/20	31/08/20	Started	Leo Atkinson-Goffe	IWC Pensions	
3.04	Weekly/Monthly Updates with Matthew Collier/Claire Massiter		01/01/20	31/08/20		Leo Atkinson-Goffe	IWC Pensions	
3.05	Employer Roll Out Complete		31/08/20	31/08/20		Leo Atkinson-Goffe	IWC Pensions	
4. External Payroll Providers "On-Boarding"								
Project Close								
99								
99.01	Communicate finalised project							
99.02								

Employer Project Plan

Employer Code	Returns method	No. EEs	Rollout	Status	Engagement Communication Sent	Create/Send Project Timeline	Set Up Employer on i-connect	Matching Data from Employer	Process Matching Data	Any data issues raised	Onsite Training and Testing	Employer Testing Period	Set up Employer on Live & Live Matching Data	Go Live
00058	Online return	7		Amber	13/02/2020									
00008	Online return	1		Amber	13/02/2020									
00032	Online return	1		Amber	13/02/2020									
00006	Online return	3	1	Amber	13/02/2020									
00036	Online return	2		Green	13/02/2020	18/02/2020	19/02/2020	19/02/2020	19/02/2020	19/02/2020	04/03/2020			
00039	Online return	14		Amber	13/02/2020									
00057	Online return	1		Amber	13/02/2020									
00018	File upload - spreadsheet	226	1	Amber	13/02/2020									
00066	Online return	1		Green	12/02/2020									
00031	Online return	4		Amber	13/02/2020									
00030	Online return	1		Amber	13/02/2020									
00064	Online return	9	1	Green	13/02/2020	24/02/2020	28/02/2020							
00065	Online return	1	1	COMPLETE	11/01/2020	22/01/2020	24/01/2020	27/01/2020	27/01/2020	27/01/2020	27/01/2020	27/01/2020	28/01/2020	01/02/2020
00047	File upload - spreadsheet	26	1	Green	23/01/2020	25/02/2020	28/02/2020	06/03/2020						
00033	Online return	15		Amber	13/02/2020									
00062	Online return	2		Amber	13/02/2020									
00051	Online return	3		Amber	13/02/2020									
00052	Online return	31		Green	13/02/2020	01/05/2020								
00060	Online return	2	1	Green	27/01/2020	26/02/2020								
00043	Online return	1		Amber	13/02/2020									
00028	Online return	1		Green	13/02/2020	18/02/2020	18/02/2020	18/02/2020	18/02/2020	18/02/2020	28/02/2020			
00005	Online return	2	1	Green	13/02/2020	20/02/2020	20/02/2020	20/02/2020	20/02/2020	20/02/2020	TBC			
00055	File upload - spreadsheet	48	1	COMPLETE	23/01/2020	24/01/2020	24/01/2020	27/01/2020	27/01/2020	27/01/2020	27/01/2020	27/01/2020	07/02/2020	07/02/2020

Employer Project Plan

Employer Code	Returns method	No. EEs	Rollout	Status	Engagement Communication Sent	Create/Send Project Timeline	Set Up Employer on i-connect	Matching Data from Employer	Process Matching Data	Any data issues raised	Onsite Training and Testing	Employer Testing Period	Set up Employer on Live & Live Matching Data	Go Live
00037	File upload - spreadsheet	57		Amber	19/02/2020									
00210	File upload - spreadsheet	991		Not started										
00054	File upload - spreadsheet	27		Not started										
00048	File upload - spreadsheet	30		Not started										
00053	File upload - spreadsheet	58		Not started										
00200	File upload - spreadsheet	153		Not started										
00063	File upload - spreadsheet	27	Test	Amber	13/02/2020									
00049	File upload - spreadsheet	25	Test	Amber	13/02/2020									
00100	File upload - spreadsheet	2349	AbSoft	Green	N/A	N/A	04/02/2020	04/02/2020	04/02/2020	04/02/2020				
00061	Online return	1		Not started										
32	TOTAL	4119												

Total to Process					32	32	32	32	32	32	32	32	32	32
Total Outstanding					5	22	24	25	26	26	27	30	30	30
Completed					27	10	8	7	6	6	5	2	2	2
Completed %					84%	31%	25%	22%	19%	19%	16%	6%	6%	6%

Risks Issue Log

Date	Risk	Status	Action	Solution
22/01/2020	Unable to receive information from payroll	Green	Email Claire/Gemma in advance so that can allocate	Information Received 10/02
22/01/2020	Member Matching with Bigger Employers/Payroll Providers needs looking at before beginning Matching	Red	Ask Matt for support in getting these prepped before starting the onboarding	
24/01/2020	Term time Employees configured differently on Altair than on the i-connect configuration. Need employers to change spec to term time adjust FTE and not Hours	Green	Adrian Created a report on how many people effected. Emailed to Matt to review and make decision	Matt agreed to carry on with current spec.
29/01/2020	Reliant on ICT/Absoft to sort file Spec and information that is generated in the report	Red	Conference call with abssoft - requested time scales - chased 21/02 for abssoft response	
11/02/2020	MSS Email address capture - members will be affected	Amber	Discuss with Matt in strategy on how we communicate to these members	Matt agreed to take off email address from file
24/02/2020	921: Contribution Rate must be within the range 5 to 12.5	Green	Raise error with Heywoods	Heywoods resolved - changed factor table in Altair
24/02/2020	Service Breakdown - Part time hours effective date is not after current date commenced employment	Red	Raise with Abssoft - Currently pulling from first working plan line and needs to be the most recent line.	
24/02/2020	1105: Part Time Hours must be entered	Green	Raise with Heywoods. - identified issue with interface 171 employees need manually changing	Utilise Alan to undergo amendments
25/02/2020	Date Joined Fund	Red	Raise with Abssoft and HR Support - Identify where this date is pulling from SAP and ensure HR's support are creating this on new starters	
25/02/2020	Part Time details are invalid	Red	Whole time employees have got part time indicator ticked - these are employees on compressed hours - raised with abssoft to ensure part time indicator is removed for employees doing 37 hours a week	