



## Wake County Public Schools System (WCPSS)

### Challenges

The Wake County Public Schools System (WCPSS) is one of the fastest-growing school districts in the nation, and thus builds many new schools each year. They use Oracle Financials as the general accounting system across the district, and Primavera Contract Manager in the facilities design and Construction Group. They had been entering data into both systems, and passing around paper copies of information. This led to confusion and inefficiency about what data was in what system, and where various documents were currently sitting.

WCPSS had the following goal:

*"to improve the ability of construction project managers to make timely and accurate decisions about managing the costs of contracts and change orders within Primavera"*

This includes making sure that Funding Available, Encumbered Funds, and Actual Costs are accurately reflected in both Oracle and Primavera, reducing redundancy and making processes more efficient.

### Our Solution

WCPSS looked to Partners Consulting to help them meet their goals. Partners first held an on-site assessment to meet all of the key stakeholders in the project and to determine a set of high-level goals that all parties could agree on. Then they held a number of follow-up meetings remotely to determine the specific paths to achieve the high-level goals. The integrations points were:

**Funding** - Projects are funded through a number of different sources, and money cannot be spent until the funding is available and entered into Oracle. The integrations replicate funding dollars from Oracle into Contract Manager. Once funds are available in Contract Manager, then users can begin entering commitments.

**Encumbrance** - Also known as commitments. These are dollars committed to vendors in the form of Purchase Orders or Contracts. These are entered into Contract Manager, and costs are allocated if funds are available. Due to compliance requirements, Purchase Orders are not automatically integrated, but instead are printed out and sent to the Purchasing group to be entered into Oracle. However, integrations check to determine whether the data into Oracle actually matches the data in Contract Manager, ensuring that any errors raise alerts and can be fixed quickly.



*Invoices* - Integrations find payments to Purchase Orders and Contracts in Oracle AP and replicate them to the corresponding item in Primavera. This allows project managers to see what has been paid in real time.

*Direct Payments* - Payments to vendors against a project, which are not written to specific Purchase Orders or Contracts are replicated in Direct Payment contracts in Contract Manager, allowing Project Managers to see what monies are being spent on any given project.

Once the requirements were set, Partners utilized its existing integration components to design a set of integrations tailored to WCPSS's specific needs. The system was deployed into a test environment so that Wake County users could fully test the system and provide valuable feedback. Once testing was completed, the system was rolled out to production, and has been running reliably since 2008.

## Results

WCPSS can now focus on managing the costs and schedules for their construction projects. Project Managers have up-to-date information about what funding is available and what funds have been encumbered, allowing them to make accurate decisions on purchasing and change orders. They also now see all costs applied to their projects at the cost-code level, including not only invoiced costs, but also direct payments to vendors and miscellaneous project costs.

The amount of paperwork involved and the subsequent delays and confusion have been greatly reduced, saving WCPSS time and money.

