

# Illinois State University Kickoff January 22, 2014



# Agenda

- Welcome and Introductions
- Opening Remarks
  - Troy Johnson, Associate Vice President for Enrollment Management
  - Matthew Helm, Executive Sponsor
- Project Scope
- Project Timeline
- Project Governance
- Project Roles/Responsibilities
- Project Management
- Implementation Methodology
- Project Activities
- Q & A



# Scope of Project

## SIS Implementation

Interaction Hub (Portal)

CRM RightNow

## Campus Solutions

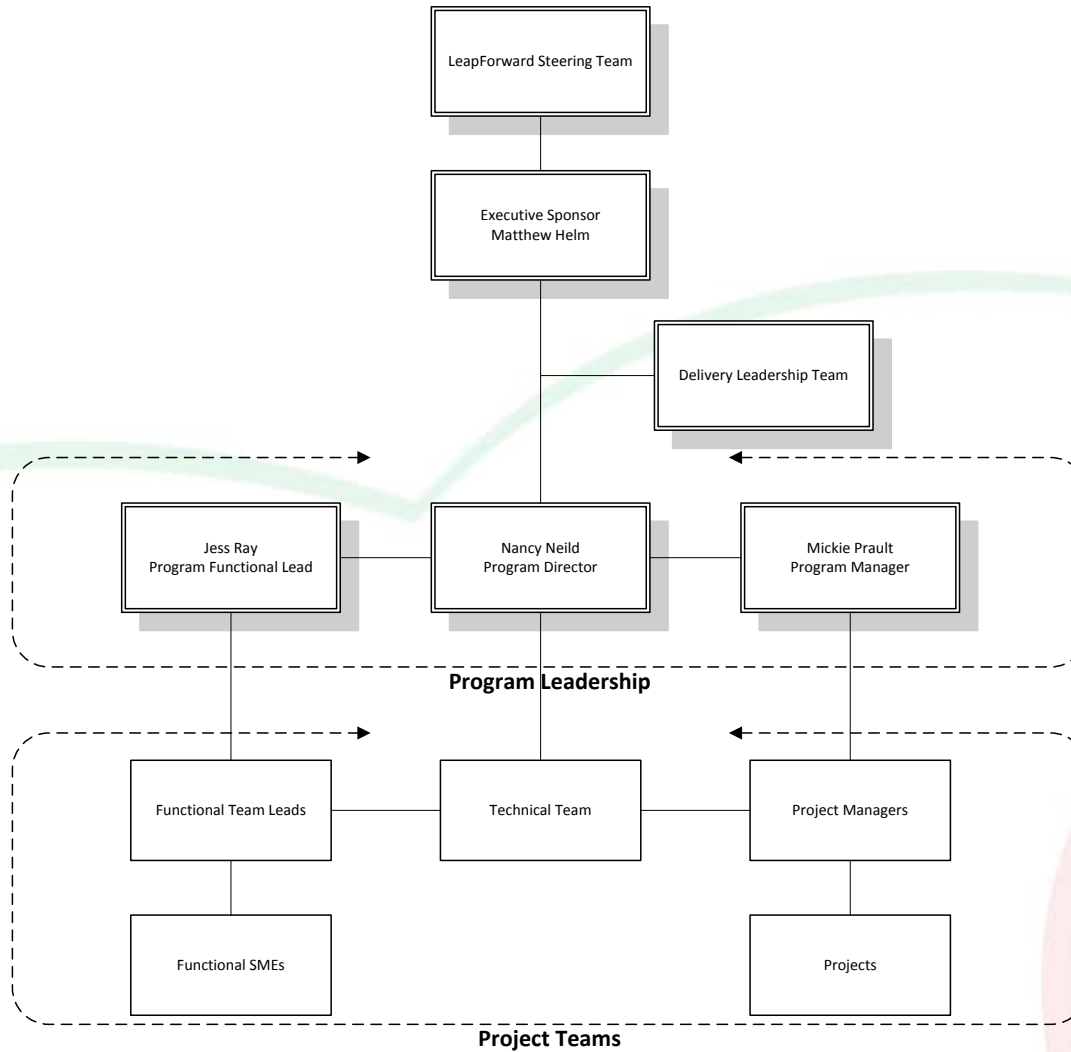
- Campus Community & Admissions
- Academic Structure & Student Records
- Academic Advising
- Student Financials
- Financial Aid



# Project Timeline

In Months	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Interaction Hub							Aug 2014							
CRM RightNow							Aug 2014							
Campus Solutions														
Campus Community & Admissions							Aug 2014							
Academic Structure & Student Records													Feb 2015	
Academic Advising													Feb 2015	
Student Financials													Feb 2015	
Financial Aid												Jan 2015		

# Project Governance



# Executive Sponsor

## Charge:

- Ultimately accountable for success of project
- Provide leadership and direction on overarching project goals, objectives and strategy to all groups, especially the Executive Steering Committee

## Scope/Jurisdiction:

- Provide leadership and guidance to the project
- Keep senior leadership informed of progress and major issues related to project
- Project sponsor and advocate with senior leadership
- Handle escalations of critical issues and projects risks from Executive Steering Committee or Project Director
- Oversee the project funding model and resolve any significant issues associated with implementation
- Resolve program-critical resource conflicts



# LEAPForward Steering Team

## Members:

- The Steering Team is composed of senior leadership drawn from both the academic and administrative functions of the University.
- <https://leapforward.illinoisstate.edu/LearnMore/Governance>

## Charge:

- Provide strategic leadership and guidance to all project stakeholders
- Project champions for reinforcement of simplification guiding principle, and required resource support for implementation success

## Scope/Jurisdiction:

- Provide leadership and guidance to the project
- Provide leadership and guidance for all stakeholders
- Handle escalations of key issues and projects risks from Project Director
- Make decisions on implementation options brought forward
- Make decisions on process change, manual steps versus modification, extension
- Support resourcing requirements and help with resource shortage/conflict resolution

# Project PMO

## Members:

- ISU Project Manager, Oracle Project Manager

## Charge:

- Provide project leadership; lead strategy and execution of project implementation tracks (e.g., process design, testing, change management, etc.)
- Facilitate decision making
- Coordinate working groups across all project components
- Secure assistance as needed (all levels)

## Scope/Jurisdiction:

- Manage project scope and drive toward project objectives (functionality/benefits, schedule, cost) and key outcomes
- Manage vendors' project resources – solution provider, system integrator(s), other central consultant resources
- Own “living” project plan incorporating all key project elements (schedule, milestones, progress toward deadlines, resourcing requirements/status, etc.)
- Develop strategy, approaches and methodologies for successful execution of implementation tracks across all project areas
- Coordinate with IT teams to ensure alignment and coordination of project activities and priorities
- Track and publish key project progress metrics and report on status and key issues





# ISU Functional Lead Responsibility

Functional Lead(s)	
AS / SR Lead	Assemble business process and requirements inventories
CC / AD Lead	Create business process model
AA Lead	Coordinate and participate in Fit/Gap Analysis activities
SF Lead	Communicate with management on impacted functional areas
FA Lead	Recommend and design gap resolutions
	Lead system set-up table configuration
	Engage end users for configuration, testing, and training activities
	Supervise business analysts (subject matter experts)
	Orient new team members to project processes
	Participate in design of conversions, interfaces, reports, customizations, and workflows
	Participate in integration test
	Lead system test
	Articulate end-user training and support plan
	Participate in the execution of the Change Management Plan



# ISU Subject Matter Experts (SMEs)

## Subject Matter Experts

Provide business process knowledge in their field as it relates to defining system requirements, validating data, executing system tests, defining user procedures, and taking ownership of system after deployment

Lead data cleansing for legacy system data

Collect, organize, and execute manual data conversion

Review and approve data conversion results

Participate in Fit/Gap Analysis activities

Propose and design gap resolutions

Design conversion and interface data mapping

Configure set-up tables for one or more functional areas

Collect reporting needs for one or more functional areas

Build custom reports

Complete business process documentation

Build ISU-specific content in the User Productivity Kit

Create test scripts

Assemble list of end users by role

Participate in system testing

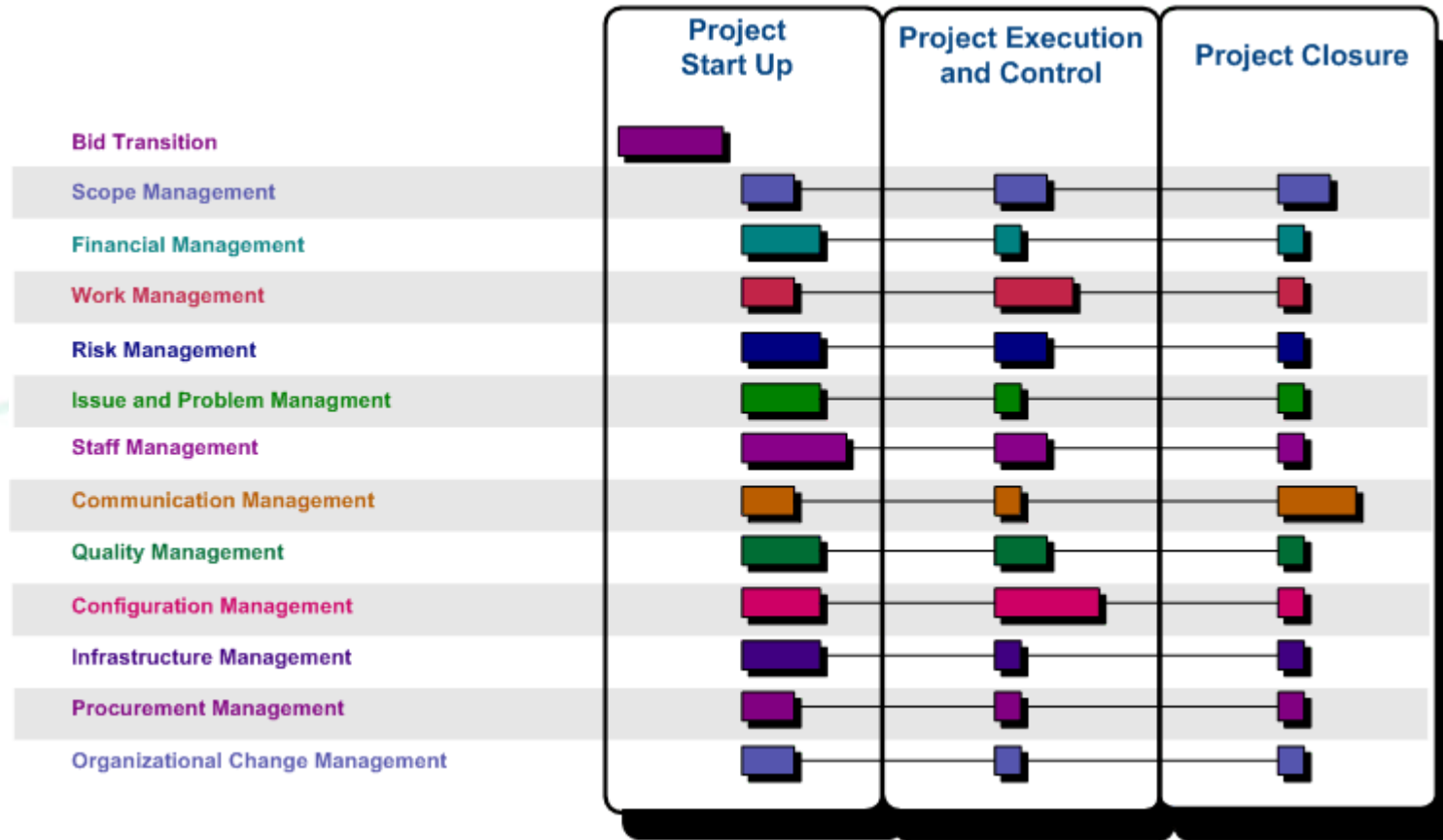
Facilitate end-user testing

# ISU Technical Staff

- Participate in conversion, interface, reports, customization, and workflow strategy creation
- Design technical specifications for conversion, interface, reports, customization, and workflow
- Code conversion, interface, reports, customization, and workflow
- Unit test conversion, interface, reports, customization, and workflow
- Participate in integration and system tests
- Assist SMEs with the design and coding of reports
- Define ISU application security strategy
- Lead security configuration for all PeopleSoft environments
- Create and distribute security definition worksheets
- Integrate security testing into test plans and scripts
- Design and configure integration to LDAP directory and ISU security strategy
- Map ISU roles and users into PeopleSoft delivered roles
- Define and maintain ISU's overall security plan, security classes, and operator requirements
- Develop, create, and maintain security classes and operators
- Maintain end-user accounts and passwords
- Maintain security configurations, roles, permission lists, and user profiles
- Migrate individual security configurations to Production



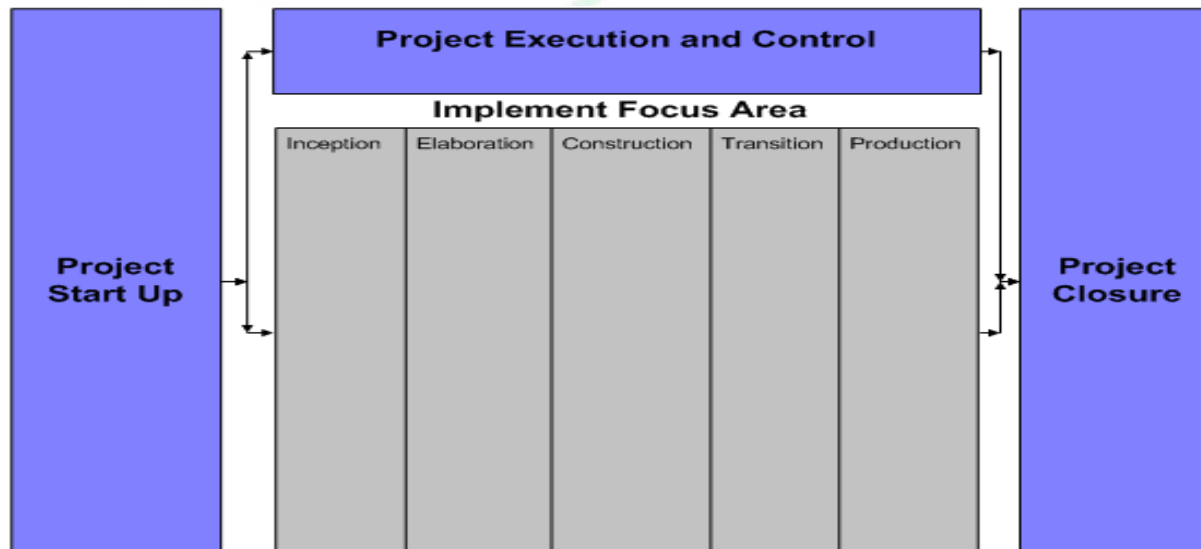
# Project Management



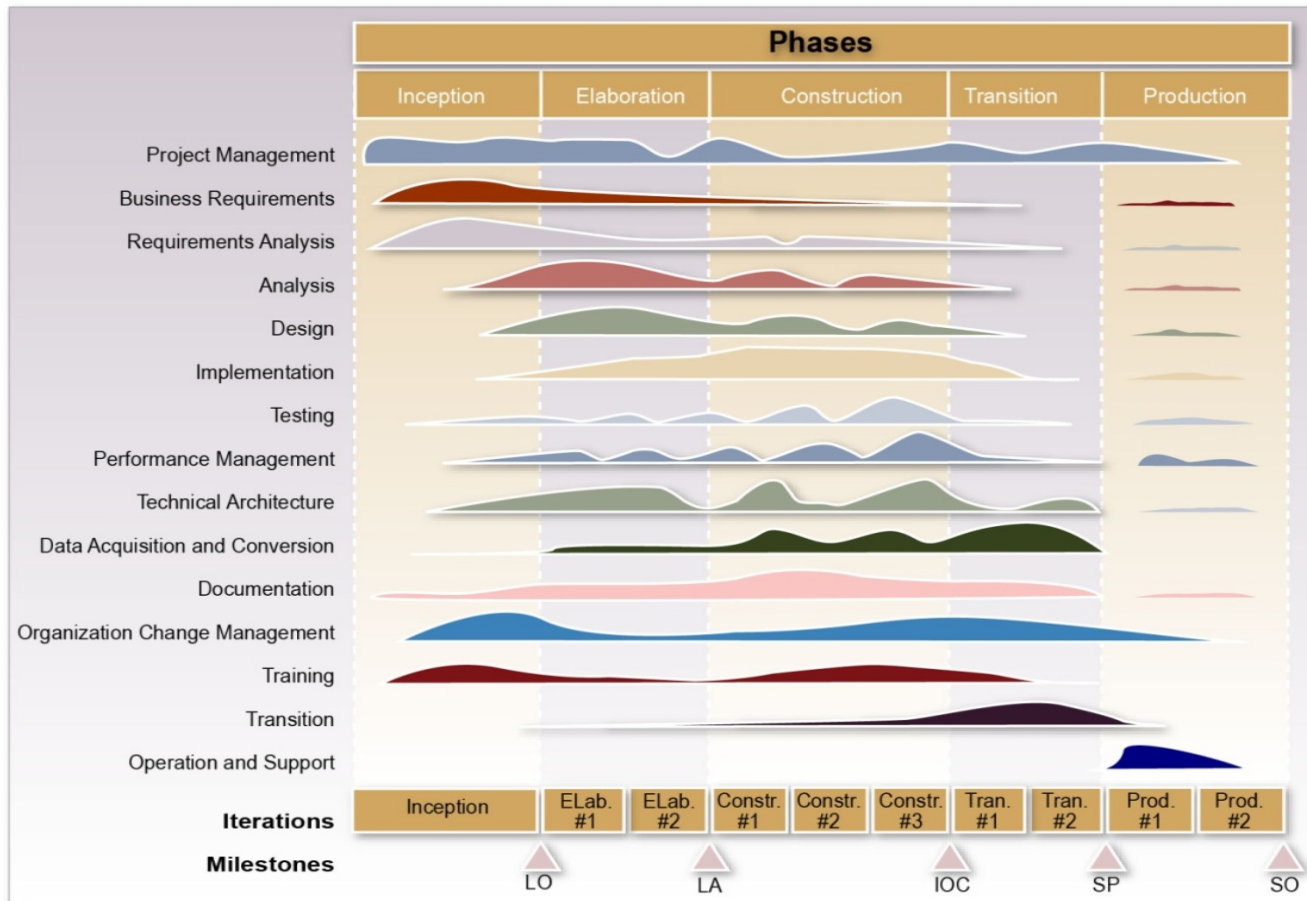
# Implementation Methodology

## Oracle Unified Method

Iterative and Incremental  
Business Process and Use Case-Driven



# OUM Phases



011-6011-001

# OUM Activities by Phase

Inception Phase	
<ul style="list-style-type: none"><li>• Gather Business Requirements – Inception</li><li>• Gather Solution Requirements</li><li>• Consolidate Solution Requirements</li><li>• Create Conceptual Prototype - Inception</li></ul>	<ul style="list-style-type: none"><li>• Gather Supporting Requirements</li><li>• Specify Key Structure Definition</li><li>• Conduct Organizational Readiness Assessment</li></ul>





# OUM Activities by Phase

Elaboration Phase	
<ul style="list-style-type: none"><li>• Gather Business Requirements</li><li>• Develop Use Cases</li><li>• Create Conceptual Prototype</li><li>• Define Project Strategy</li><li>• Define Infrastructure</li><li>• Develop Test Plans</li><li>• Perform Fit Gap</li></ul>	<ul style="list-style-type: none"><li>• Specify Software Configuration</li><li>• Baseline Software Architecture</li><li>• Analyze – Elaboration</li><li>• Design – Elaboration</li><li>• Develop Prototypes</li><li>• Validate Prototypes</li><li>• Prepare to Acquire and Convert Data – Elaboration</li></ul>



# OUM Activities by Phase

Construction Phase	
<ul style="list-style-type: none"><li>• Finalize Requirements</li><li>• Analyze – Construction</li><li>• Design - Construction</li><li>• Perform Test Planning</li><li>• Prepare Environments</li><li>• Implement System</li><li>• Perform Unit Test</li></ul>	<ul style="list-style-type: none"><li>• Perform Integration Test</li><li>• Perform System Test</li><li>• Prepare for Transition</li><li>• Prepare for Cutover</li><li>• Test Infrastructure</li><li>• Acquire and Convert Data</li><li>• Produce Documentation</li></ul>



# OUM Activities by Phase

Transition Phase	
<ul style="list-style-type: none"><li>• Support User Acceptance Test</li><li>• Convert Data</li></ul>	<ul style="list-style-type: none"><li>• Review, finalize documentation</li><li>• Move to Production</li></ul>



# OUM Activities by Phase

Production Phase	
<ul style="list-style-type: none"><li>• Manage Production System Performance</li><li>• Evaluate Production System</li><li>• Resolve Production Problems</li></ul>	<ul style="list-style-type: none"><li>• Deploy Change Management Roadmap / Communication Campaign - Production</li><li>• Plan for Future</li><li>• Sign-Off Milestone</li></ul>

# Project Activities

<b>Responsibilities</b>	<b>Oracle</b>	<b>ISU</b>
Day to day Project Management	✓	✓
Prepare Functional specifications	✓	✓
Prepare Technical specifications	✓	
Review Functional specifications	✓	✓
Review Technical specifications	✓	
Prepare Test Scenarios	✓	✓
Provide Data Extracts		✓
Unit Test	✓	✓
SIT	✓	✓
UAT		✓



# Q & A

