Student Administration
Go-Live Assessment

Presented to Project Steering Committee
May 31, 2006
Table of Contents

- Executive Summary
- Assessment Process
- Assessment
- “Go-live” versus “Delay”
- Recommendations
- Critical Milestones
- Q&A
Executive Summary

- Appropriate risk assessment and mitigation strategies have been defined for UMS to meet existing “go live” dates
- Campus Community/Admissions/Recruit modules
  - Countdown calendar created
  - Tasks identified are reasonably on schedule
  - Strategies defined to hit the July 31, 2006 “go live”
- CRM/eApps – status of tasks and timeline will support a September 12, 2006 “go live”
- Shared Processing Center
  - Sufficient hardware and staff available to support the low volume expected on July 31, 2006
  - Center should be able to ramp up functionality and capacity to continue to meet increased volume later in the fall
Assessment Process

- **Objectives:**
  - Determine the state of readiness
  - Identify critical issues and risk mitigation strategies
  - Recommend a “go” or “delay” decision

- **Methodology:**
  - Review and analyze project documents
  - Conduct interviews with key project staff

- **Deliverables:**
  - Recommendations Report
  - Support final presentation to Sponsors, Steering Committee and the campus Presidents

- **Lead Consultant:** John Busby, PhD
Assessment
Assessment

- Campus Community/Admissions/Recruit
  - Schedules and task timelines exist but exist within a particular group and are not integrated with other plans or well communicated among the “team” (“team” includes the staff at the System office as well as the IDP team from the campuses)
  - An integrated plan is needed to determine the viability of this project meeting the July 31, 2006 “go live”
  - No contingency plan appears to exist for the “go live” of Campus Community/Admissions/Recruit
Assessment (continued)

- CRM/eApp
  - There is considerable effort remaining to be completed to meet the projected “go live” but the plan and timeline are realistic
  - CRM/eApp project plan milestones need to be integrated with the milestones for Campus Community/Admissions/Recruit modules
Assessment (continued)

- Processing Center
  - Need a realistic plan and timeline to document functionality and capacity growth over time (illustrate how the Processing Center will ramp up over time)
  - The plan to provide hardware (for center and campus), center staffing and training (for center and campus staff) is in place but the schedule is tight
  - Center currently has sufficient hardware and staff in place to handle the low volume of work expected on July 31, 2006
  - Center should be able to ramp up capacity to handle the increased volume of applications this fall
Assessment (continued)

- Communication and Training
  - Communication plan is very comprehensive but may lack sufficient resources to implement it appropriately and completely
  - Training plan is well developed but it too may lack sufficient resources to meet the training demands of future modules such as Student Records (SR)
“Go-live” versus “Delay”
Valid Project Reasons for Not “going live” on 7/31/06

- Critical interfaces don’t exist/work
- Conversion not successful
- Campus staff not appropriately trained – don’t know how to access or use the system
- UAT encounters critical processes that aren’t fixed and tested prior to final conversion date
- Production hardware not in place prior to final conversion date
- Production db instance not available or configured properly by 7-24-06
Impact of an Extended Delay

- PSFT instance/configuration must be maintained and updated until the next opportunity to “go live” – functional and technical teams must continue to support this effort
- Consultant(s) may need to continue to support changes on CC/AD/Recruit coming from setup of other Campus Solutions modules
- Creates an atmosphere of “we can rest now” which can negatively impact getting CC/AD/Recruit ready for a later “go live”
- Delay adds its own set of risks and costs
  - May be difficult to re-establish momentum
  - May be difficult to establish a new firm “go-live” date
  - Increases consultant costs
  - A perfect “go-live” is difficult to obtain so how do you determine when you are ready the next time
  - Delay may impact the timeline of the other modules
Properties of a successful “go live”

- Project team uses a “countdown” calendar to guide the project toward the “go live”
- All groups determine what can go wrong that will impact the “go live”? – list the possibilities and define a “mitigation” strategy for each
- Be creative in considering options – “What do you really need at ‘go live’?”
A “delay” should be the decision of last resort!

Exhaust all alternative strategies first!
Recommendations
Recommendations

- Campus Community/Admissions/Recruit
  - Create a countdown calendar from current date to August 15 for Campus Community/Admissions/Recruit to document the tasks, responsibilities, timelines, critical milestones (“go” or “no go” decision points) and alternative strategies if critical dates are not met. (A draft calendar was created the week of May 22 and it will be updated continually to reflect changes)
  - There is no reason to consider any lengthy delay of the “go live” of these modules. The countdown calendar indicates sufficient time to meet critical milestones and has appropriate alternative strategies to meet the existing “go live”. Recommendation is to proceed with the July 31, 2006 “go live”
  - Continue to expand the countdown calendar to include the remaining modules of Campus Solutions. Continue to re-evaluate the schedule and risk mitigation strategies of the remaining modules
Recommendations (continued)

- CRM/eApplication
  - Integrate the CRM/eApp project more tightly with the Campus Community/Admissions/Recruit project and add CRM/eApp tasks and milestones to the countdown calendar
Recommendations (continued)

- **Processing Center**
  - Create a realistic plan showing functionality and capacity versus a timeline, risks and risk mitigation strategies – work with the Directors of Admission to finalize the plan and clear up misconceptions – show how the Processing Center will ramp up functionality and capacity over time and will be able to match the demand as it grows this fall
  - The projected application volume (based on historical data) for August and September is within the anticipated capacity of the Center for those two months. The recommendation is to proceed with the Processing Center “go live” for July 31, 2006
Recommendations (continued)

- Communication and Training
  - Communication
    - Need consistent messages going to campuses and need more involvement of campus groups and Sponsors to help deliver the messages
    - Need to assess the effectiveness of the communications throughout the project and do it early in the process and often
  - Training
    - Develop web based courses for the content where the training audiences are very large
    - Consider credentialing – staff may attend training but there is no assessment of what they have learned or know about using PSFT – without the assessment you will provide access to PSFT to those merely attending the class but not necessarily learning the material
Critical Milestones
Critical Milestones

- Campus Community/Admissions/Recruit
  - 6/2/06 – All development completed and tested
  - 6/9/06 – Test scripts completed
  - 6/12/06 – Begin System Tests
  - 6/26/06 – User Acceptance Testing (UAT) begins
  - 7/14/06 – UAT ends
  - 7/19/06 - CSPRD ready for final conversion (CSPRD – production version of Campus Solutions)
  - 7/24/06 – CSPRD final build begins
  - 7/31/06 – “go live”
Critical Milestone Timeline

- **Campus Community/Admissions/Recruit**
  - 6/2/06 – All development completed and tested
  - 6/9/06 – Test Scripts completed
  - 6/12/06 – Begin System Tests
  - 6/26/06 – UAT begins
  - 7/14/06 – UAT ends
  - 7/19/06 – CSPRD - final conversion
  - 7/24/06 – CSPRD - final build
  - 7/31/06 – “go-live”
Critical Milestones (continued)

- CRM/eApp
  - 7/3/06 – All development completed and tested
  - 7/3/06 – Test scripts completed
  - 7/5/06 – Begin System Tests
  - 7/17/06 – User Acceptance Testing (UAT) begins
  - 7/28/06 – UAT ends
  - 8/14/06 - CRPRD ready (CRPRD – production version of the CRM/eApp)
  - 9/12/06 – “go live”
Critical Milestone Timeline

- CRM/eApp

  - 8/14/06 – CRPRD - final build
  - 7/17/06 – UAT begins
  - 7/3/06 – Test Scripts completed
  - 7/3/06 – All development completed and tested
  - 7/5/06 – Begin System Tests
  - 7/28/06 – UAT ends
  - 9/12/06 – “go-live”
Critical Milestones (continued)

- Shared Processing Center
  - 6/16/06 – ImageNow drawers & document definitions completed
  - 6/28/06 – Security groups & privileges completed
  - 7/5/06 – Staff hiring completed
  - 7/10/06 – Initial workflow queues completed & staff move into SPC
  - 7/14/06 – Center hardware setup completed & staff trained on PeopleSoft processes
  - 7/21/06 – Staff and campus reps trained on ImageNow
  - 7/31/06 – “go live” – Processing Center in operation & begins to scan summer & fall ’07 applications and documents
  - 9/1/06 – Workflow queues fully developed & center begins ramp-up for fall ’07 application cycle
Critical Milestone Timeline

- **Shared Processing Center**
  - 7/21/06 – Trained on ImageNow
  - 7/10/06 – Workflow queues completed
  - 6/28/06 – Security groups & privileges completed
  - 6/16/06 – ImageNow drawers & document definitions completed
  - 7/5/06 – Staff hiring completed
  - 7/14/06 – Center hardware setup completed
  - 7/31/06 – SPC “go live”
  - 9/1/06 – Workflow queues fully developed
Shared Processing Center Ramp-Up

By 9/1, only 100 apps will require processing. Anticipated Center will be ready for full production.

By 10/1, about 200 apps will require processing. Last date for all staff to be hired and trained.

By 11/1, about 500 apps will require processing.

By 12/1, over 1,500 apps will require processing.
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Q & A