Agenda – Day 1

- Executive Message
- COMPASS Overview
- Student Information System Project Overview
- High Level Timeline Review
- Team Organization & Responsibilities
- Propel Methodology Overview
- Who, What, Where, When and Why is an IDP
- Requirements Lifecycle
- Technical side of Life
Executive Message

Dr. Zina Evans, Vice President Enrollment Management  
SIS Executive Sponsor

Elias Eldayrie, Vice President and Chief Information Officer  
SIS Executive Sponsor
COMPASS Goals

- Improve the User Experience for Students, Faculty, and Staff

- Modernize Student Systems
  - Constituent Relationship Management
  - Student Information System
  - Room Scheduling
  - Self-Service Portal
  - Admissions Systems
  - Learning Eco-System
COMPASS Goals

- Implement Common Business Processes
- Reduce Shadow Systems
- Implement a Data Management Strategy
  - Establish Student Master Data Management
  - Implement a New Student Data Warehouse
  - Develop New Reporting and Analytic Capabilities
- Retire the Mainframe
COMPASS Guiding Principles

- This is a student focused campus-wide program. We all have shared accountability for its success.

- Apply UF thinking to make decisions that benefit the entire university including student, faculty and staff.

- Challenge assumptions and the status quo. During requirements and design activities ask “Why do we do it this way?”.
Communication is essential to the success of the program. The team will communicate frequently, clearly, and directly with the university stakeholders keeping them informed about program activities.

We will provide multiple opportunities for campus engagement in order to understand and address the needs of the university community.
COMPASS Guiding Principles

- Minimize customizations through the use of delivered system functionality. Customizations will be subject to governance approval.

- Resources fully allocated to the program will be protected from distractions of non-program tasks.
COMPASS Guiding Principles

- Decision making will be delegated to the lowest level supported by defined processes and governance.

- We will reengineer our processes as needed to improve the user experience.

- Free the data!
Triple Constraint

- Budget
- Time
- Scope
COMPASS Overview

Dr. Tammy Aagard, Associate Vice President for Enrollment Management
SIS Steering Committee Co-Chair

Dave Gruber, Senior Director, UFIT
SIS Steering Committee Co-Chair
Replace the current student system with a third-party vendor product (Oracle Campus Solutions) that will be better suited to meet the needs of the university’s undergraduate, graduate and professional students, faculty, and staff.
Constituent Relationship Management (CRM)

- Replace the existing systems that are used to:
  1) Prospecting and recruiting activities.
  2) Retention
  3) Alumni (future)
- Streamline processes that are managed in different systems.
- Centralize data and consolidate processing for each prospective student throughout the prospect to admission cycle.
- Replace systems that are used to manage communication
Learning Eco-System

- Content
- LMS – Learning Management System
- Data and Analytics
One.UF

- Replace current student and faculty self-service with a consistent, integrated, and intuitive user experience.
- ONE.UF will aggregate commonly used functions into one site accessible by mobile, tablet, or desktop devices.
Reporting / Analytics

- Customizable user interface that is designed for mobile first
- Easy to use interface that exposes functionality in-context, as needed
- Self-Service analytics through ease of accessibility
- Advanced data visualization capabilities
Student Data Governance & Master Date Management (MDM)

- Implement data governance that ensures student data is managed consistently.
- Provide the human ingredient necessary for successful master data management.
- Enable the business stakeholders of the university to take active responsibility for governing and stewarding data, with support from UFIT.
Questions?
Student Information System
Project Overview

Dr. Tammy Aagard, Associate Vice President for Enrollment Management
SIS Steering Committee Co-Chair

Dave Gruber, Senior Director, UFIT
SIS Steering Committee Co-Chair

Ben Santelman, Vice President, Higher Education
Sierra-Cedar
Student Information System – Initiation Activities

- **Program Established**: Mar 4
- **SIS Software Selected**: Dec 5
- **SIS Implementer Selected**: Feb 27
- **Contract Signed**: Jan 29

**2012**
- **Program Definition**: 42 days, Jan 7 - Mar 5
- **Establish Program Governance**: 22 days, Feb 4 - Mar 5

**2013**
- **Student Information System Migration Analysis**: 204 days, Mar 5 - Dec 13
- **Document System Capabilities Requirements**: 49 days, Mar 5 - May 10
- **Rank System Capabilities Requirements**: 65 days, May 13 - Jul 26
- **Perform Software Fit/Gap and Recommendation**: 47 days, Jul 29 - Oct 1

**2014**
- **Assess Recommendation**: 47 days, Oct 2 - Dec 5
- **SIS Implementation - Planning and Vendor Selection**: 510 days, Jan 6 - Dec 18
- **Develop and Issue Invitation to Negotiate**: 126 days, Jan 6 - Jun 30
- **Vendor Response and Evaluation**: 174 days, Jul 1 - Feb 27
- **Negotiation of Master Services Agreement**: 170 days, Mar 2 - May 29
- **Planning and Contract Negotiation**: 170 days, Jun 8 - Jan 29
Student Information System Benefits

- Configuration driven design reducing the need for technical solutions
- A system developed with best practices of universities comparable to the size and complexity of UF
- Easier access to university-wide student data
Student Information System Benefits

- Improved data quality
- More sustainable system with vendor supplied updates
- Improved disaster recovery capabilities
Partnering Principles

- Direct senior executive oversight and decision making
- Competitive pricing | Predictable UF cost
- Quality personnel
- Cooperation with UF’s technology partners
- Alignment of accountability and responsibility
- Thorough and speedy issue resolution
Sierra-Cedar by the Numbers

30+ Years in Business

More than $300 Million in Service Revenue

More than 1500 Successful Oracle Projects

Oracle Experts 700+

More than 250 Higher Education Consultants

W-2 Consultants are Employees

Client Success! More student system projects completed successfully than any other provider.
Questions?
High Level Timeline Review

Dr. Tammy Aagard, Associate Vice President for Enrollment Management
SIS Steering Committee Co-Chair

Jill Palla, Associate Vice President, Higher Education
Sierra-Cedar
Student Information System

- **Course Catalog and Schedule Complete**: Sep 1
- **Design Complete**: Apr 3
- **Academic Structure Ready for Prod**: Apr 2
- **ISIR Load Complete**: Jan 29
- **Degree Audit Report Complete**: Mar 1
- **Enrollment Functionality Complete**: Apr 2
- **Posting Grades Functionality Complete**: Aug 20
- **SIS Project Complete**: Nov 20

**2015 - 2019 Timeline**

- **Feb 22**: SIS Project Kickoff
- **Campus Solution Design Complete; Release Dates Finalized**: Feb 29 - Sep 1
- **Release 2: Course Catalog and Schedule of Classes**: Sep 2 - Nov 20
- **Release 3: Career/Program/Plan Conversion, ISIR Loads, Verification**: Sep 2 - Jan 15
- **Release 4: Degree Audit Report, Academic Advising, Award Aid**: Sep 2 - Mar 1
- **Release 5: Registration, Transfer Credit, Enrollment Verification**: Sep 2 - Apr 2
- **Release 6: Tuition Calculation, Student Billing**: Sep 2 - Jul 2
- **Release 7: Post Grades, Generate Transcripts, Disburse Aid**: Sep 2 - Aug 20
- **Campus Solutions Stabilization**: Aug 21 - Nov 20
## Go Live Phasing Strategy

<table>
<thead>
<tr>
<th>Phase</th>
<th>Description</th>
<th>First Go-Live Dates</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>Campus Community and Admissions</td>
<td>June 30, 2017</td>
</tr>
<tr>
<td>2</td>
<td>Course Catalog and Schedule of Classes</td>
<td>November 20, 2017</td>
</tr>
<tr>
<td>3</td>
<td>Financial Aid ISIR Loads</td>
<td>January 29, 2018</td>
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<tr>
<td>4</td>
<td>Academic Advising</td>
<td>March 1, 2018</td>
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<tr>
<td>5</td>
<td>Registration/Enrollment</td>
<td>April 2, 2018</td>
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<tr>
<td>6</td>
<td>Student Accounts</td>
<td>July 2, 2018</td>
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<tr>
<td>7</td>
<td>Grades and Transcripts</td>
<td>August 20, 2018</td>
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</table>
Timeline: “Phases” and “Releases”
Questions?
Team Organization & Responsibilities

Jim Freymann, Associate Director
UFIT
SIS Project Director
# Functional Work Groups

<table>
<thead>
<tr>
<th>Campus Community Work Group</th>
<th>Admissions Work Group</th>
<th>Student Financials Work Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Karen Adamson, Lead</td>
<td>Mike Miller, Lead</td>
<td>Dorothy Etienne, Lead</td>
</tr>
<tr>
<td>LB Robbins, SCI Lead IDPs</td>
<td>Maureen Yeung</td>
<td>Tricia Riskowitz</td>
</tr>
<tr>
<td>TBD, SCI Lead</td>
<td>Shannon Parrish</td>
<td>Mary Friedlieb, SCI Lead 1</td>
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<tr>
<td></td>
<td>Juan Yip</td>
<td>TBD, SCI Lead 2</td>
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<tr>
<td></td>
<td>Jeff Rivell, SCI Lead 1</td>
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<tr>
<td></td>
<td>TBD, SCI Lead 2</td>
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<table>
<thead>
<tr>
<th>Financial Aid Work Group</th>
<th>Student Records Work Group</th>
<th>Academic Advisement Work Group</th>
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<tbody>
<tr>
<td>Mike Dugger, Lead</td>
<td>Diana Hull, Lead</td>
<td>Toby Shorey, Lead</td>
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<tr>
<td>Christina Lamb</td>
<td>Mallori Wojcik</td>
<td>TBD 1</td>
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<tr>
<td>Max Mauney</td>
<td>Colin Yokomi</td>
<td>TBD 2</td>
</tr>
<tr>
<td>Kimberly Schmitt</td>
<td>Joseph Uong</td>
<td>TBD 3</td>
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<tr>
<td>Paula Kurtz, SCI Lead 1</td>
<td>Christina Persaud</td>
<td>Ross Leisten, SCI Lead 1</td>
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<tr>
<td>TBD, SCI Lead 2</td>
<td>Cathy Smith</td>
<td>TBD, SCI Lead 2</td>
</tr>
<tr>
<td></td>
<td>Nancy Wiegand, SCI Lead 1</td>
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<tr>
<td></td>
<td>TBD, SCI Lead 2</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Graduate/Law/Med Work Group</th>
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<tbody>
<tr>
<td>Lisa DeLaCure, Lead</td>
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<tr>
<td>TBD, Med Lead</td>
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<tr>
<td>TBD, Law Lead</td>
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<tr>
<td>LB Robbins, SCI Lead</td>
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</table>
Organizational Change Management Work Group

Communication, Change Management, Training Oversight
Jodi Gentry, UF

Organizational Change Management Lead
TBD, UF

Communication Lead
TBD, UF

Training Lead
TBD, UF
Testing Work Group

Testing

Joyce Kosak, Lead
Gary Grossheim
Maureen Avery, SCI Lead
Shared Responsibilities

- There are general responsibilities that all personnel assigned to the project bear in order for the project to be successful. These responsibilities include but are not limited to...
  - Participate in the decision making process;
  - Complete tasks in accordance with the project schedule and indicate where potential deviations exist;
  - Recognize that effective knowledge transfer for all University of Florida personnel assigned to the project is a high management priority and is required of all on the project.
Work Group Leads

- General responsibilities for all leads are:
- Project Work Group leads will promote the success of the project by managing their lead areas.
- During initial project phases Sierra-Cedar will lead their University of Florida counterparts through project activities. As the project progresses, Sierra-Cedar leads will move from coaching and mentoring roles transitioning lead responsibilities to their University of Florida partners.
Work Group Leads

- Assist with development and updating of project schedules for their respective work groups
- Report progress on milestones, dependencies and critical path items to the Project Management Office
- Participate in weekly Work Task Review and Project Schedule Management sessions
- Coordinate & monitor work group member task assignments
Work Group Leads

- Identify resource needs and communicate them to the Project Management Office
- Escalate issues and risks to the Project Management Office
- Review work group deliverables for completeness and accuracy
- Implement the knowledge transfer plan for the resources within their work group
Work Group Leads

- Function as the central point of contact for the work group’s decision making activities
- Configuration and testing of the Campus Solution system to ensure it meets University of Florida requirements
- Coordinate functional application setup by Participating in establishing table setup
- Assist with data mapping and manual data conversion
Work Group Leads

- Developing the test plan and test scripts
- Participating in system testing
- Communicate with members within their own work group and across the broader project team
- Assist in identifying end user training needs
- Prepare functional design specifications
Work Group Members

- Work group teams are responsible for the hands-on work of implementing the new system.
- The work group members report to their respective Work Group Lead.
Work Group Member

- Participate in IDP sessions where assigned;
- Participate and/or review the results of other IDP sessions as assigned;
- Assist with configuring, build and testing of the Campus Solutions system to meet University of Florida requirements;
- Identify and communicate issues and risks to the work group lead;
Work Group Member

- Produce specifications for conversions, interfaces, customizations, workflows, and reports
- Validate converted data
- Test configuration and technical development including interfaces, customizations, workflows and reports.
- Assist in identifying end user training needs
Leadership Team

Executive Committee
Joe Glover, Charlie Lane, Zina Evans, Elias Eldayrie, Hank Frierson, Dave Kratzer, Mike McKee, Michael Perri, Dave Richardson, Faculty Senate Rep, Student Government Rep, Tammy Aagard, David Gruber

Steering Committee
Tammy Aagard, David Gruber, Zina Evans, Elias Eldayrie, Jodi Gentry, Angela Lindner, Marie Zeglen
Jim Freymann, Mark Burison

Project Management Office
Jim Freymann, Mark Burison
Owen Callahan, Dawnn Bean
Executive Committee

- The Executive Steering Committee provides:
  - Executive sponsorship and oversight for the project;
  - Champions the project;
  - Provides overall direction;
  - Ensures funding and availability of resources to carry the project to its completion;
Steering Committee

- The Project Steering Committee assists in:
  - Defining project scope and further developing/refining project goals;
  - Ensures project plan and outcomes align with enterprise strategic goals and initiatives.
  - Provides direction and guidance in development of the project plan, implementation efforts and resource allocations.
The Project Management Office provides overall leadership for the project;

- Broad project direction and management;
- Employ proven project management tools, procedures and controls to enable effective project monitoring;
- Establish project controls that ensure the quality of project deliverables and minimize disruption to the project schedule including: change control, quality assurance, risk management and issue management;
Ensure that milestones, dependencies, and critical paths are aligned for project success;

Identify, analyze, plan, track and control issues and risks;

Manage deliverable acceptance procedures, ensuring deliverables are completed in accordance with the contract provisions, meet acceptance criteria and appropriate sign-offs are obtained.

Participate and/or conduct in Work Task Review and Project Schedule Management sessions;
Project Management Office

- Manage and assist in status reporting across the work groups;
- Serve as the first level of escalation for issues and decisions that cannot be resolved at the project team level;
- Escalate appropriate issues to the Steering and Executive Committees;
- Monitor expenditures against the budget, perform variance analysis and report to the executive sponsors;
Project Management Office

- Provide a single point of contact for the dissemination of information to the sponsors to accomplish consistent reporting of progress, issues and risks;
- Facilitate sponsor meetings by establishing the agenda, gathering supporting documentation, distributing documentation in advance of the meeting and recording decisions reached during the meeting;
- Manage the project in accordance with Sierra-Cedar Propel methodology
Questions?
Propel Methodology Overview

Mark Burison, Senior Consultant
Sierra-Cedar
SIS Project Director
Sierra-Cedar’s Propel Methodology
Propel Methodology Benefits

- Engenders buy-in from the campus community
- Helps address the issue of various client staffing needs
- Identifies opportunities and facilitates leading practices
- Optimizes interrelationships of business processes
Propel Methodology Benefits

- Promotes teaming among diverse constituencies
- Transfers knowledge efficiently
- Accelerates implementation
- Reduces cost of implementation
Project Management Component

- Scope management
- Resource management
- Cost management
- Communication management
- Knowledge transfer
- Quality management
- Issue and risk management
- Change management
Project Quality Management

- Occurs throughout the project lifecycle - Initiation to Closeout
- Periodic Project Quality Reviews occurring at key points
- Continuous Oversight
- Coaching & Mentoring
# Phase I: Plan & Discover

## Activities

**PHASE I: PLAN & DISCOVER**

<table>
<thead>
<tr>
<th>Project Preparation</th>
<th>Readiness Assessment</th>
<th>Preliminary Fit Gap Analysis</th>
<th>Scope Definition &amp; Confirmation</th>
<th>Project Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Begin</td>
<td>Begin</td>
<td>Begin</td>
<td>End</td>
<td>End</td>
</tr>
<tr>
<td>Conduct Intro Call</td>
<td>Conduct Interviews</td>
<td>Schedule Preliminary Fit Gap Sessions</td>
<td>Conduct Scope Definition Meetings</td>
<td>Review &amp; Propose Updates to Project Charter Draft</td>
</tr>
<tr>
<td>Participate in On-Site Planning Meeting</td>
<td>Analyze, Prepare &amp; Deliver Readiness Rpt</td>
<td>End</td>
<td>Participate in Preliminary Fit Gap Sessions</td>
<td>End</td>
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<td></td>
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<td></td>
<td></td>
<td>Participate in Preliminary Work Plan</td>
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</tbody>
</table>

**Activities:***
- Conduct Intro Call
- Participate in On-Site Planning Meeting
- Conduct Interviews
- Schedule & Lead Orientation Meeting
- Participate in Interviews
- Receive Readiness Report & Take Action on Recommendations
- Schedule Preliminary Fit Gap Sessions
- Create Preliminary Fit Gap Report
- Participate in Preliminary Fit Gap Sessions
- End
- Participate in Scope Definition Meetings
- Participate in Scope Confirmation Meeting
- End
- Participate in Preliminary Work Plan Review and Approval
- Participate in Preliminary Work Plan Review and Approval
Phase I: Plan & Discover Deliverables

Project Readiness Assessment → Scope Confirmation Report → Work Breakdown Structure → Project Charter

High-Level Business Process Overview → Preliminary Fit/Gap Report → Preliminary Project Work Plan

Key:
- Process-centric Deliverables
- Other Deliverables
- Evolving System
- QA Reviews
Propel Methodology – Phase II

- Phase I: Plan & Preview
- Phase II: Analyze & Design
- Phase III: Configure & Develop
- Phase IV: Test & Train
- Phase V: Deploy & Optimize
Phase II: Analyze & Design

Activities

PHASE II: ANALYZE & DESIGN

<table>
<thead>
<tr>
<th>Technical Preparation</th>
<th>Interactive Design &amp; Prototyping</th>
<th>Preliminary Training &amp; End User Support</th>
<th>Technical Planning</th>
<th>Detailed Project Work Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>CCI &amp; Client Project Managers</td>
<td>Participate in Detailed Fit/Gap Sessions</td>
<td>Participate in Detailed Fit/Gap Report Presentation</td>
<td>Review &amp; Approve System Prototype</td>
<td>Begin</td>
</tr>
<tr>
<td>Steering Committee/Client Executive Sponsor</td>
<td>Conduct Detailed Fit/Gap Analysis</td>
<td>Develop Preliminary Configuration Guide</td>
<td>Update Configuration Guide</td>
<td>End</td>
</tr>
<tr>
<td>Functional Leads</td>
<td>Develop &amp; Present Detailed Fit/Gap Report</td>
<td>Configure Preliminary Configured Prototype</td>
<td>Complete Functional Design Specifications</td>
<td></td>
</tr>
<tr>
<td>Business Area Experts</td>
<td>Design &amp; Develop Business Processes</td>
<td>Test System Prototype</td>
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<td></td>
</tr>
<tr>
<td>Technical Leads</td>
<td>Review Infrastructure</td>
<td>Participate in Detailed Fit/Gap Sessions</td>
<td>Configure Preliminary Configured Prototype</td>
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</tr>
<tr>
<td>Technical Specialists</td>
<td>Participate in Infrastructure Review</td>
<td>Perform Technical Tasks for System Prototype</td>
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<td>End</td>
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<tr>
<td></td>
<td>Oversee Oracle Install &amp; Certify PS S/W</td>
<td>Develop Conversion Plan</td>
<td>Develop Interface Plan</td>
<td>Develop Reporting Plan</td>
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<tr>
<td></td>
<td>Develop Patch &amp; Fix Plan</td>
<td>Develop Security Plan</td>
<td>Develop Preliminary Deployment Plan</td>
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</table>
Phase II: Analyze & Design
Interactive Design & Prototyping (IDP)

- An IDP is a set of interactive sessions involving Sierra-Cedar consultants and the UF project team and subject matter experts.
- Interactive Design/Prototyping (“IDP”) is Sierra-Cedar’s business process analysis approach.
- IDPs are focused on the desired Institutional Processes and how they can be performed using Campus Solutions across typical functional boundaries.
Phase II: Analyze & Design Deliverables

- Prepared Infrastructure
- Preliminary Configuration Guide
- Functional Specifications
- IDP Sessions
- Preliminary Configured System Prototype
- Preliminary Business Process Guides
- Detailed Project Work Plan
- Preliminary Technical Plans
- QA Review Report

Key:
- Process-centric Deliverables
- Other Deliverables
- Evolving System
- QA Reviews
Propel Methodology Phase III

PHASE I
Plan & Preview

PHASE II
Analyze & Design

PHASE III
Configure & Develop

PHASE IV
Test & Train

PHASE V
Deploy & Optimize

PROJECT

MANAGEMENT

CLIENT
# Phase III: Configure & Develop

## Activities

|-------------------------------|-------------|----------------|---------------------------|--------------|-----------------------------|---------------|--------------------------|

**Technical Leads**
- Begin Create Environments
- Create Tech Specs
- Develop customizations, modifications, reports & interfaces
- Migrate Objects & Data Files
- Begin Develop Conversion Programs
- Update Data Mapping & Conversion Programs
- Begin Develop Preliminary Testing Plan & Scenarios
- Design and Implement Preliminary Security Schema
- Conduct Unit Testing
- Complete Configured System Prototype

**Business Area Experts**
- Validate Setup & Transaction Tables

**CIO & Client Project Managers**
- Steering Committee / Client Exec Sponsor

**Technical Specialists**
- Apply PS Patches & Fixes

**End**
- Complete Configured System Prototype
- Develop Detailed Business Process Guides, User Procedures, & Other Forms
- Develop & Deliver Communication Materials

**End**
- Update Configuration Guide
- Refine Business Process Designs
- End
Phase III: Configure & Develop Deliverables

Key:
- Process-centric Deliverables
- Other Deliverables
- Evolving System
- QA Reviews

Diagram:
- Technical Specifications
- Converted Data
- Customizations & Modifications
- Preliminary Testing Plan
- Unit Testing
- Detailed Configuration Guide
- Detailed Configured System Prototype
- Detailed Business Process Guides
- Preliminary Deployment Plan
- Detailed Business Process Guides
- Preliminary Training Materials
- Business Process Test Scripts
- QA Review Report
Propel Methodology Phase IV
Phase IV: Test & Train

Activities

PHASE IV: TEST & TRAIN

Infrastructure Update & Conversion Validation

Testing

Knowledge Transfer & Training Setup

Training Delivery

Go-live Planning

- Update Infrastructure
- Validate Conversions
- Perform System & Integration Testing
- Perform Acceptance Testing
- Perform Stress & Volume Testing
- Perform Parallel Testing
- Evaluate Results & Conduct Additional Tests
- Finalize Business Process Guide
- Finalize Configuration Guide
- Create Detailed Training Materials
- Finalize Training Plan
- Train End Users
- Train Support Staff
- Finalize End User Support Plan
- Finalize Cutover Plan

Begin

End

End Users

Technical Leads

Functional Leads

Business Area Experts

CIO & Client Project Managers
Phase IV: Test & Train
Deliverables

- Infrastructure Updated
- Detailed Testing Plan
- Testing
- Fully Tested System
- Finalized Business Process Guides
- Detailed Training Plan & Materials
- End User Training Options
- QA Review Report

Key:
- Process-centric Deliverables
- Other Deliverables
- Evolving System
- QA Reviews
Propel Methodology Phase V
**Phase V: Deploy & Optimize**

**Activities**

<table>
<thead>
<tr>
<th>PHASE V: DEPLOY &amp; OPTIMIZE</th>
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</thead>
<tbody>
<tr>
<td>Planning &amp; Preparation for Cutover</td>
</tr>
</tbody>
</table>

- **Quality Specialist**
  - Conduct Go-live Readiness Assessment
  - Prepare Finalized Contingency Plan
  - Participate in Project Quality Review
  - Perform Post Production Support Tasks

- **CIO & Client Project Managers**
  - Prepare Production Environment
  - Approve Go-live

- **Technical Leads**
  - Prepare Finalized Cutover Plan
  - Execute Finalized Cutover Plan

- **Technical Specialists**

- **Functional Leads**

- **Business Area Experts**
  - Steering Committee
  - Client Executive Sponsor

- **UFCOMPASS**

-compass.ufl.edu
Phase V: Deploy & Optimize

Deliverables

- Prepared Production Environment
- Go-live Readiness Assessment Report
- Finalized Deployment Plan
- Cutover Plan
- Contingency Plan
- QA Project Assessment
- Successful System Cutover
- Post-production Support Services

Key:
- Process-centric Deliverables
- Other Deliverables
- Evolving System
- QA Reviews
Continuous Knowledge Transfer Model

Business Process Knowledge & Institutional Insights

Campus Solutions Knowledge & Large Research Institution Experience

Fit/Gap Analysis
High Level Business Process Overview
Business Process Analysis & Design
Technical Design & Development
System Configuration Guide
Business Process Guides
Data Conversion
Testing Scripts
Training
Questions?
Who, What, Where, When and Why is an IDP

Jill Palla, Associate Vice President, Higher Education
Sierra-Cedar
What is an “IDP”?  

- IDP stands for “Interactive Design and Prototype”  
- IDP’s are interactive fit gap sessions centered around a specific business process that drive project decisions, project documents and a system prototype. During IDPs, the teams will gather requirements, design the system, and build a working prototype of the SIS Project.  
- Interactive is an important part of the process because it means YOU are the key to the decision-making!
What is an “IDP”? 

Interactive Design and Prototype (IDP) Process

Review current process and communicate UF requirements

Demonstrate how similar process works in Campus Solutions

Build the prototype solution in Campus Solutions

Discuss, Validate, and Design future business process in Campus Solutions
What is an “IDP”?

- Build the prototype solution in Campus Solutions
- Homework assignments to research issues and complete system setup
  - Working Group meetings to solidify process, finalize decisions and update prototype
  - Create minutes of IDP Session and post on SharePoint
  - Identify and create an inventory checklist
    - Data Conversion
    - Interfaces
    - Workflow
    - Reporting Requirements
    - Security
    - Potential Gaps and Extensions
  - Design Review Sessions with User Community for final sign-off
What is the “IDP” Flow?

IDP Fit/Gap Flow

1. Start IDP Process
2. Gather business requirements
   - This is when you are asking the client about their current business. Do NOT even open up PS yet!
3. Review against delivered functionality
   - Make sure to show how the data will appear in PS. DO NOT start with setup tables!
4. Design key business processes
5. Build IDP prototype using UF data
6. Determine gaps and possible solutions
7. Identify requirements: Reports, interfaces, conversions, customizations, security
8. Document decisions and recommendations
9. Final Business Processes are designed as the Prototype is developed and GAPS/Solutions are identified.
10. Future Business Processes begin to take shape. Work out GAPS solutions with the client as they learn more about the system from working in Prototype Database, etc.

Final Business Processes are designed as the Prototype is developed and GAPS/Solutions are identified.

These items will add to the Configuration Guide; begin to complete functional specification Requests for Reports, Customizations, Conversions, Interfaces, and Security.

Business Processes should now be defined. Decisions and recommendations should be taking place and will be carried forward to Phase III: Configure and Develop.
What is the Prototype?

- Is a working model of the future system
- Contains representative sample data and a subset of setup tables
- Includes no modifications
- Allows for integrated system testing to ensure the system works as expected by all
- Demonstrates concepts discussed in IDP sessions
- Builds basis for production system
Why do we want a Prototype?

- To demonstrate the application
- To test business processes
- To provide a learning environment
- To further develop design work
- To provide the basis for other environments
- To test cross functional processes
Getting Ready for IDPs

- IDPs will be scheduled with calendars coordinated to be sure the right people can be together
- Topics will be known ahead of time and you will be asked to bring your information on the process being discussed
## High Level IDP Schedule

- **Campus Community** – February 29th
- **Academic Structure** – March 28th
- **Module Specific - April 11th**
  - The team splits into smaller groups to discuss business processes within the work groups:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Topic</th>
<th>Facilitator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interactive Design &amp;</td>
<td>Mon – Wed: 9-12; 1-4</td>
<td>Campus Community IDPs</td>
<td>Laura Beth Robbins, Jeff Rivell</td>
</tr>
<tr>
<td>Prototyping (IDP)</td>
<td>Thurs: 9-12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monday, Feb 29 –</td>
<td>Mon – Wed: 9-12; 1-4</td>
<td>Academic Structure IDPs</td>
<td>Nancy Wiegand</td>
</tr>
<tr>
<td>Thursday, Mar 25</td>
<td>Thurs: 9-12</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Monday, Mar 28 –</td>
<td>Mon – Wed: 9-12; 1-4</td>
<td>Core Module IDPs</td>
<td>Sierra-Cedar Leads</td>
</tr>
<tr>
<td>Thursday, Apr 7</td>
<td>Thurs: 9-12</td>
<td>Admissions</td>
<td></td>
</tr>
<tr>
<td>Monday, Apr 11 –</td>
<td>Mon – Wed: 9-12; 1-4</td>
<td>Student Records</td>
<td></td>
</tr>
<tr>
<td>Thursday, Jun 30</td>
<td>Thurs: 9-12</td>
<td>Academic Advising</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Financial Aid</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Student Financials</td>
<td></td>
</tr>
</tbody>
</table>
Who Participates in IDPs?

- After calendars are created the people are part of the process being discussed and those who can make decisions are invited. These include:
  - Sierra-Cedar Work Group Leads
  - UF Work Group Leads
  - Work Group Members
  - UF Business Area Experts
  - UF and SCI Technical Specialists (when needed)
# IDP Master Calendar

**All Module IDP Calendar (see module-specific schedules for details)**

IDPs are Monday - Wednesday 9 - 12 pm and 1 - 4 pm and Thursday 9 - 12; Friday are for meetings, follow up and homework

*Gray cell indicates All Project Team Event / No IDP Sessions*

*Orange cell indicates All Team involvement in IDP*

<table>
<thead>
<tr>
<th>Date</th>
<th>Admissions</th>
<th>Student Records</th>
<th>Advising</th>
<th>Financial Aid</th>
<th>Student Financials</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/18/2016</td>
<td>9-12 pm Participation, Activities, Awards</td>
<td>Student Program Plan</td>
<td>State, Inst &amp; Out-of-State Grants</td>
<td>Payment Application</td>
<td></td>
</tr>
<tr>
<td>4/19/2016</td>
<td>1 - 4 pm Participation, Activities, Awards</td>
<td>Student Program Plan</td>
<td>Mass Packaging</td>
<td>Payment Application</td>
<td></td>
</tr>
<tr>
<td>4/20/2016</td>
<td>9-12 pm Admission Supporting Materials</td>
<td>Student Term Records</td>
<td>Mass Packaging</td>
<td>Payment Application</td>
<td></td>
</tr>
<tr>
<td>4/21/2016</td>
<td>9-12 pm Admission Supporting Materials</td>
<td>Student Enrollment</td>
<td>Repackaging</td>
<td>Payment Application</td>
<td></td>
</tr>
<tr>
<td>4/22/2016</td>
<td>1 - 4 pm Admission Supporting Materials</td>
<td>Student Enrollment</td>
<td>Online Awarding</td>
<td>Payment Application</td>
<td></td>
</tr>
<tr>
<td>4/25/2016</td>
<td>9-12 pm Application Basics</td>
<td>Student Enrollment</td>
<td>FA Work Session</td>
<td>Cashiering</td>
<td></td>
</tr>
<tr>
<td>4/26/2016</td>
<td>1 - 4 pm Application Basics</td>
<td>Student Enrollment</td>
<td>External Awards</td>
<td>Cashiering</td>
<td></td>
</tr>
<tr>
<td>4/26/2016</td>
<td>1 - 4 pm AD 3C Checklists</td>
<td>End of Term - Grading</td>
<td>External Awards</td>
<td>Cashiering</td>
<td></td>
</tr>
<tr>
<td>4/27/2016</td>
<td>9-12 pm AD 3C Comments</td>
<td>End of Term Processing</td>
<td>Award Notif, Shopping Sheet</td>
<td>Self-Service</td>
<td></td>
</tr>
<tr>
<td>4/27/2016</td>
<td>1 - 4 pm AD 3C Communications</td>
<td>End of Term Processing</td>
<td>Award Notif, Shopping Sheet</td>
<td>Payment Plans</td>
<td></td>
</tr>
<tr>
<td>4/28/2016</td>
<td>9-12 pm AD 3C Engine and Comm Gen</td>
<td>End of Term Processing</td>
<td>Working Session</td>
<td>Payment Plans</td>
<td></td>
</tr>
</tbody>
</table>
## Campus Community Agenda

- The first part of the agenda tells you what will be discussed.

### Campus Community IDP Agenda

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>People Soft Tables for Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, February 29, 2016</td>
<td>Introduction to Campus Community – what is it!</td>
<td>Biographical Data Setup Tables</td>
</tr>
<tr>
<td></td>
<td>Goals for Campus Community IDPs</td>
<td>o Name Suffix</td>
</tr>
<tr>
<td></td>
<td>People Processing</td>
<td>o Name Prefix</td>
</tr>
<tr>
<td></td>
<td>What ‘people’ data is collected currently?</td>
<td>o Address Types</td>
</tr>
<tr>
<td></td>
<td>How does student data get created in the system?</td>
<td>o Name Types</td>
</tr>
<tr>
<td></td>
<td>How does student data get updated?</td>
<td>o Email Types</td>
</tr>
<tr>
<td></td>
<td>How is student data maintained?</td>
<td>o Phone Types</td>
</tr>
<tr>
<td></td>
<td>Where does this data currently reside?</td>
<td>o Salutations</td>
</tr>
<tr>
<td>9 am - 12 pm</td>
<td>Review Student Biographical Details about students</td>
<td>o Name Usage</td>
</tr>
<tr>
<td>1 pm – 4 pm</td>
<td>• Names</td>
<td>o Address Usage</td>
</tr>
<tr>
<td></td>
<td>• Addresses</td>
<td>o Phone Usage</td>
</tr>
<tr>
<td></td>
<td>• Ethnicity (USA Centric)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Email Addresses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Phone Numbers</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Social Security Number</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Gender</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Marital Status</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Veterans</td>
<td></td>
</tr>
</tbody>
</table>
IDP Session Structure

- Depending on the process, sessions may take different formats
- IDPs are focused on business processes
  - Interactive work using the software
  - Discuss the process and demonstrate using delivered functionality as the base
  - Identify opportunities to streamline processes
  - Identify gaps in delivered functionality
  - Document and assign action items
- Breakout sessions held to work through requirements, i.e. calculations, rules, etc.
IDP Ground Rules

- Arrive prepared
- Sessions start on time
- Participate
- No question is a "dumb question"
- One conversation at a time
- No Sacred Cows

- Time limit on ‘tangents’ (use the parking lot)
- Focus on requirements, not current system
- Keep an open mind
- It’s OK to agree to disagree
- Quiet electronics

Have fun!
What is discussed?

- Identify gaps and discuss/decide solutions
  - Are customizations really needed?
    - These add to cost/timeline of the implementation and subsequent upgrades?
- Identify reports
  - Are all reports used and needed?
- Identify interfaces
  - What downstream systems need to be fed data from this system of record?
  - Identify Conversions
What is discussed? (cont.)

- Discuss and define change management requirements
  - What activities will change?
- Discuss and define security requirements
  - Who will have access to the system?
  - Who will have access to specific pages within the system?
  - Who will have access to what type of data?
- Discuss and Define training requirements
  - What will need to be trained and which approach should be used?
What Happens During Non-Session Time?

- Review minutes
- Follow up on session parking lot, issues and other items
- Participate in smaller breakout sessions as required
- Work on deliverables
- Begin work on System Configuration Documents
- Begin work on Business Process Documents.
Follow Up

- Document items in Action Item Log
- Assign responsible party and due date
- Follow through to resolution
- Report completion and outcome to IDP session facilitator
- IDP session facilitator marks action item
- Complete in Action Item Log
- Review action items at least weekly
What are IDP Deliverables?

- IDP Session Minutes
  - Distributed the following day
  - Captures decisions on how the system will be used
- Issue Log
- Test Scenarios List
- Detailed Fit/Gap Analysis
- System Configuration Guide
- Preliminary Business Process Guide

Lists
What are IDP Deliverables?

- Configured Prototype to review results
- Updated Project Plan
- Training Curriculum List
- Requirements Traceability Matrix (RTM)
- Testing Requirements Matrix (TRM)
## What Makes Propel Successful?

<table>
<thead>
<tr>
<th>Traditional Methodology</th>
<th>Propel Methodology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software-centric</td>
<td>Business process-centric</td>
</tr>
<tr>
<td>Methodology-centric</td>
<td>Human-centric</td>
</tr>
<tr>
<td>Directive</td>
<td>Collaborative</td>
</tr>
<tr>
<td>Sequential phases</td>
<td>Concurrent activities, timing of activities</td>
</tr>
<tr>
<td>Large teams</td>
<td>Small teams</td>
</tr>
<tr>
<td>Few teams</td>
<td>Many teams</td>
</tr>
<tr>
<td>Emphasis on documents</td>
<td>Emphasis on understanding</td>
</tr>
</tbody>
</table>
Continuous Knowledge Transfer Model

Business Process Knowledge & Institutional Insights

Campus Solutions Knowledge & Large Research Institution Experience

Fit/Gap Analysis
High Level Business Process Overview
Business Process Analysis & Design
Technical Design & Development
System Configuration Guide
Business Process Guides
Data Conversion
Testing Scripts
Training

UF

Sierra-Cedar

compass.ufl.edu
IDPs Deliver Results

- SCI consultants partner their knowledge with UF’s knowledge of business processes.
- Working together, the team creates a solution that focuses on the business requirements and how the system supports UF’s business processes.
- Learning new system will take a conscious effort. IDPs allow knowledge transfer to take place in every session, growing the system from the ground up.
Questions?
Requirements Lifecycle

Laura Beth Robbins, Senior Consultant
Sierra-Cedar
SIS Graduate/Law/Med Lead

Jeff Rivell, Senior Consultant
Sierra-Cedar
SIS Admissions Lead
Requirements Lifecycle

- Review **Business Process** during IDP Session!
Requirements Lifecycle

- Compare UF requirements with delivered functionality

Design Key business processes
Requirements Lifecycle

- Configure IDP prototype
- Evaluate delivered functionality
- Identify gaps and possible solutions

Configuration Guide

Develop

Functional Specification(s)
Winner – Natural “Fit” with Configuration!!

- Testing, Migrating & Documenting

Core Functional Team

Test Instance

Validate

Migration and deployment -> QAT -> PRD
Extensions, Bridging a “Gap”

- Prepare functional specification
- Clarify the details of the request
Extensions

Functional specification

Review with technical resources
What's Next?

Functional Specification

Technical Development

Create an Extension
Extension – Testing, Migrating & Documenting

Core Functional Team → Testing → Test Instance → Signoff

Migration and deployment -> QAT -> PRD
The Parts & The Team Come Together

- Configuration, extensions, migrations, deployments – success!
Questions?
Technical Side of Campus Solutions

Nicole Garvey Jeffers, Application Developer Analyst
UFIT
SIS Technical Work Group Lead

Bill Dillingham, Senior Consultant
Sierra-Cedar
SIS Technical Work Group Lead
The University of Florida
CS 9.2 Implementation
Agenda

- Introduce a few of many instances
- Quick word about Software Change Control
The UF Family of Campus Solutions Instances

DMO  SBX  DEV  TST  QAT  PRD  FIX

CNV  IDP  GLD  LOD  TRN
Regular Instances

- These instances support normal flow of new extensions and configuration through Campus Solutions. They remain after the implementation.
- They are: DMO, SBX, DEV, TST, QAT, FIX & PRD
SBX
Implementation Instances

- These instances are tasked with supporting the implementation activities. Once the implementation is complete, you’ll not see these around.
- They are – IDP, CNV, GLD, LOD
IDP
Software Change Control

- Software Change Control’s sole purpose is to protect and preserve the integrity of UF’s Campus Solution Production Instance.
  - It is why you test, test and retest.
  - It is why you document how problems are solved.
  - It is why you provide signoff.
  - The list goes on and on.
  - Most important, it allows us all get a good night’s sleep.
Software Change Control

- Software Change Control is made up of several steps. Here are the big ones:
  - Functional Specifications (how to fix a gap)
    - These arise from gaps in what Campus Solutions provides and what UF needs in order to do business
  - Functional Specification Reviews
    - Reviews of functional specifications by functional folks, the ones that wrote it, and the technical folks, the ones that will do it.
  - Estimates
    - How much work is the functional specification going to generate.
  - Approvals by leadership and testers
Software Change Control

- Software Change Control is made up of several steps. Here are the big ones (cont.)
  - Development
    - Transforming the functional specification to actual Campus Solution objects
  - Unit Testing
    - Testing done by the technical resource ensuring, as far as they are concerned, what they built is what was asked.
  - Documentation
    - Recording what they did and how they did it
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Because the Technical Presentation has ended
Day I Wrap Up

Jim Freymann, Associate Director
UFIT
SIS Project Director
Agenda – Day 2

- Communication, Training & Organizational Change Management
- Project Management Approach
- Guidance...Framework...Contractual Obligations
- Project Mechanics
- Documentation Repository: SharePoint
- Project Team Training Schedule
- Interactive Design & Prototyping (IDP) Schedule
- Closing Remarks/Questions
Organizational Change Management

Jodi Gentry, Assistant Vice President
Office of Human Resource Services

COMPASS Organizational Change Management Engagement
A Goal of Change:
Improving an organization by altering how work is done

“THE SECRET OF CHANGE IS TO FOCUS ALL OF YOUR ENERGY, NOT ON FIGHTING THE OLD, BUT ON BUILDING THE NEW.”

— Socrates
Let’s Discuss

- What is it? What do we mean by “organizational change management”? And why bother?

- How will we go about it?

- How will it affect you?
What Is Organizational Change Management? Why Bother?

- Change typically impacts:
  - Processes
  - Systems
  - Organization structure
  - Job roles

- It is not enough to merely prescribe the change and expect it to happen
  - Takes hard work
  - And an understanding of what must actually take place to make the change happen
Project Management vs. Change Management

- Project management:
  - Application of knowledge, skills, tools, and techniques to activities to meet **project requirements**
  - Initiating, planning, executing, monitoring and controlling, and closing

- Change management:
  - Process, tools, and techniques to manage the **people side of change** to achieve the required outcome
  - Tools to help individuals make successful personal transitions resulting in the adoption and realization of change
Project Management vs. Change Management

- **Project managers:**
  - Identify **milestones, activities** to be completed
  - Outline resources needed, how they work together
  - Define the scope of the project/program

- **Change managers:**
  - Identify, craft **key messages** to be communicated
  - Work to build strong and active **coalitions**
  - **Make the case** for why the change is needed to employees throughout the organization, even before the specific details of the solution are complete
Why Bother?

What do you think?
Why Bother?

- Change management depends on the amount of disruption created in employees’ day-to-day work.
- It also depends on the organization’s culture, value system, and history with past changes.
- As humans, we also respond somewhat predictably to change.
  - By understanding and communicating with this “change cycle” in mind, we can lessen the negative impact, make better decisions, and speed up adoption—to build the new.
How Do We Manage Change at UF?

- Phase 1—Inform
- Phase 2—Engage
- Phase 3—Prepare

Our plans and activities will have a recursive quality:
- Because COMPASS will span 3 to 5 years
- With releases following the student life span
- We will likely have various phases occurring at the same time in support of different releases
Phase One—Inform

- Frame the program through **key messages** in a way that can be used now and moving forward as the program progresses
  - Description of program and its impact
  - Used consistently to create a shared understanding
Phase One—Inform

- Prepare the needed **infrastructure** for communication, outreach, and training as the program moves forward
  - Change management workgroup
  - Branding—COMPASS
    - Campus-wide Modernization Program to Advance Student Services
  - Website (compass.ufl.edu), email address (UF-compass@ufl.edu)
  - Launch plan (formal communication—Admin Memo, etc.)
Campus-wide Modernization Program to Advance Student Services

STUDENT DATA GOVERNANCE

STUDENT INFORMATION SYSTEM—SIS

ONE.UF

myUFL

REPORTING/ANALYTICS

CONSTITUENT RELATIONSHIP MANAGEMENT—CRM

LEARNING ECO-SYSTEM

MASTER DATA MANAGEMENT—MDM
Phase One—Inform

- **Communicate** with offices to ensure employees understand what is occurring and are provided appropriate opportunities to engage
  - Information sessions, college and key unit meetings (thank you, Tammy, Dave, and Dan)

- Develop a **detailed plan** that further develops Phase One-Inform along with Phases Two and Three
  - Based on milestones, multiple releases
Phase Two—Engage

- Provide opportunities for campus to engage in, learn more about, and influence the outcomes of the program—as appropriate—to improve readiness and acceptance.

- Develop and deploy introductory training (and/or materials), as appropriate, and lay the groundwork for the preparation phase of the plan.
Phase Three—Prepare

- **Focus** campus’ attention on the program’s implementation

- Provide more **formalized opportunities for campus to learn** what’s coming—changes, impacts, etc.

- Prepare campus to transition successfully through a **robust training plan**
### Change Management Tools?

<table>
<thead>
<tr>
<th>Process</th>
<th>Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning for change</td>
<td>Individual change model</td>
</tr>
<tr>
<td>Managing change</td>
<td>Communications</td>
</tr>
<tr>
<td>Reinforcing change</td>
<td>Sponsorship</td>
</tr>
<tr>
<td></td>
<td>Coaching</td>
</tr>
<tr>
<td></td>
<td>Training</td>
</tr>
<tr>
<td></td>
<td>Resistance management</td>
</tr>
</tbody>
</table>

*(From Prosci’s research-based methodology)*
How Will This Affect You?

- Well, you are human

- Being mindful of the change cycle can be helpful to avoid personalization—for example:
  - Are you in Stage 3 discomfort?
  - Is a colleague in denial?
  - Etc.

- You also can help the change management team by providing information and working to understand our role
In Practice?

The Change Management Team will:

- **Advocate**
  - Represent faculty, staff, and students especially via the change management work group
    - COMPASS must be seen as a university-wide effort, not something done to campus by UFIT and Enrollment Management
  - Provide an outside perspective to consider
In Practice?

- Advocate
  - **Challenge thinking** (at times) in ways that project team members may consider overstepping
    - Identify or ask about potential risks as we see them
    - Assume “Devil’s advocate” role
    - Push for candor
  - Champion and celebrate too
    - **Communicating “wins”** is an important part of effective change management
In Practice?

- Of course, communicate
  - Using target audience matrix
  - Create a change management/communication plan
    - Internal to COMPASS as well as external (broader campus) audiences

- Promote opportunities “to engage”
  - Campus involvement to influence outcomes and ensure buy-in and understanding
  - **Create opportunities for “resistance”** early enough to do something with it
Critical to the Role

- Managing expectations
  - We must **do what we say we are going to do**
  - Ongoing “blue sky thinking” and speculation must be used judiciously, if at all (and always with an overt caveat)

- Being involved **at every stage** in the project/program—not determined by when “it’s time to communicate”

- Your help and understanding will be central to the success of this effort
Questions?
Project Management Approach

Mark Burison, Senior Consultant
Sierra-Cedar
SIS Project Director
Define the Job in Detail:
◦ Review Project Environment.
◦ Organize by major business function.
◦ Identify scope to be delivered.
◦ Document team responsibilities

Involve the Right People:
◦ Identify project personnel.
◦ Structure project responsibilities.
◦ Establish roles, goals & objectives.
◦ Create "Winning Environment".
Project Management Approach

- **Estimate the Time & Costs:**
  - Include everything in your estimate.
  - Estimate both elapsed time and dollars.
  - Document estimating assumptions.
  - Establish “budget for change”.

- **Break the Job Down:**
  - Define all tasks in “40 hours” or less.
  - Obtain individual resource commitment.
  - Create “weekly status reporting”.
Project Management Approach

- **Set Up Change Procedure:**
  - Define procedure for changes.
  - Document all scope changes.
  - Determine impact of changes.
  - Obtain budget/time authorization.
  - Agree to “manage changes”.

- **Agree on Acceptance Criteria:**
  - Formally agree on acceptance criteria.
  - Document series of approvals.
  - Identify appropriate personnel.
  - Agree/Deliver/Approve = "DONE".
Issue & Risk Escalation Process

- Any team member can and should raise issues or risks.
- Record on the status report & discuss with your work group lead.
Issue & Risk Escalation Process

- Work group lead notifies the project management office
  - Will be recorded in the issue/risk log, assigned an owner, severity & due date… (tracked until resolved)

- Issues & risks not resolved at the project level will be escalated to the steering and/or executive committees
  - With immediate escalation for high severity items
Unit Testing

- Components of the SIS Solution are tested to ensure the components function and operate in accordance with UF Business and Technical Requirements.

- The SIS Solution is tested for Americans with Disabilities Act (ADA) compliance based on test parameters identified by UF.

- Verify that a SIS Solution Module functions and operates in accordance with UF Business and Technical Requirements and all Interfaces and Extensions function according to the agreed upon design.
System & Integration Testing

- **System testing** is the functional and technical testing of each major system component.

- **Integration testing** focuses on testing processes between the application modules and between the application and other systems.
Security & Conversion Testing

- **Security Testing:**
  - Verify security controls are configured and implemented properly, and that all users profiling / single sign-on functionality prevents any unauthorized functional activities. Verify all external security threats are managed to an acceptable level of Risk.

- **Conversion Testing:**
  - Converted and migrated data is tested to ensure that all applicable data elements have been successfully converted, merged and migrated, and that such conversions and migrations have been validated.
System & Integration Testing

- Verify that all SIS Solution modules communicate properly and data flows are correct; ensure that all Interfaces, extensions and reports function as designed, and the SIS Solution modules meet the enterprise data integration requirements and needs.

- System/Integration testing confirms that all processes are tested in sequence and data flows from one business process into the next as expected.

- Simple conditions are tested first, followed by increasingly complex conditions until all inputs, processes, and outputs have been thoroughly tested.
Acceptance Testing

- Verify that the end-to-end SIS Solution functions and operates in accordance with UF Business and Technical Requirements.

- During acceptance testing, functional users execute all application functions related to their business processes.

- Acceptance testing confirms the system meets business requirements and also verifies the business processes for the application are complete, well understood, and well documented.
Performance (Stress/Volume) Testing

- Verify the SIS Solution performs in accordance with the Performance Standards, and stress testing demonstrates at what level the SIS Solution performance begins to degrade.

- Performance testing occurs in a production state manner to verify that the system is capable of accurately and effectively managing high volume and peak period processing.

- Unless packaged software products are available to mimic multiple users, performance testing is based on a mutually agreed upon number of users that access the system simultaneously.
Business Continuity Testing

- Verify that the Disaster Recovery and Business Continuity Plan successfully executes when presented with all relevant test failures.

- Verify that the Disaster Recovery and Business Continuity Plan executes within specified timeframes.
Regression Testing

- Verify no unexpected or inadvertent failures from adding new SIS Solution modules, or the application of any patches, fixes or other enhancements.

- If issues are identified and logged, functional and/or technical updates may be required to resolve a particular issue.

- As issues are resolved, additional testing is completed to validate that the issue is fixed properly.
Change Order Process

- Project change control will be an on-going task during the entire lifecycle of the implementation.
- Includes identifying and managing changes that positively or negatively impact the project scope and/or schedule.
- Project change control includes identification, analysis, control, and communication of proposed scope changes during all project phases.
Change Order Process

- Initiating the request through a formal Change Request document.
- Documenting the business purpose.
- Defining the work to be performed.
- Outlining the acceptance criteria.
- Estimating the level of effort.
- Providing the effect (if any) on project schedules.
- Providing the total estimated cost.
Questions?
Guidance...Framework... Contractual Obligations

Jim Freymann, Associate Director
UFIT
SIS Project Director
Guidance, Framework, Contractual Obligations

- Contract Components
  - Master Services Agreement (MSA)
    - Scope of Agreement
    - Partnering Principles – Definition of Relationship
    - Definition of Terms
  - Statement of Work (SOW)
    - Responsibilities
    - Deliverables
    - Scope of Services
  - Project Agreement (PA)
    - All scoping documents, plans, and payment terms
Guidance, Framework, Contractual Obligations

- Creates a framework to execute within
- Ensures project management discipline is followed
- Implementation methodology and strategies are defined
Guidance, Framework, Contractual Obligations

- Roles, responsibilities and obligations are understood
- Mechanisms are established to manage the relationship between all parties (disputes, external entities..)
- Resource commitments are defined
Guidance, Framework, Contractual Obligations

- Knowledge Transfer
  - Prepare for own and operate
  - UF and Sierra-Cedar contribute equally
  - Demonstrate > Cooperate > Mentor

- Commitment
  - Time, Energy, Focus
  - What does 100% allocated to this project really mean?

- Deliverables
  - Complete tasks on time
  - Raise your hand early and often
Guidance, Framework, Contractual Obligations

- Certification
  - Role of Sierra-Cedar and UF
  - Quality, Completeness, Accuracy
  - Time Boxed

- Change
  - Process to manage scope, schedule and budget
  - De Minimis Change
  - Material Change
Questions?
Project Mechanics

Dawnn Bean, Senior Consultant
Sierra-Cedar
SIS Deliverables Project Manager
Project Mechanics

- Project Schedule
- Work Group Meetings
- Issue / Risk Management
- Status Reporting
Project Schedule

- Budget
- Time
- Scope
Project Schedule

The diagram illustrates the project schedule, balancing between being cheap, fast, and in your dreams (good).
Work Group Meetings

- Work Group Meetings
  - Where everyone gets a voice
  - Attendance is important

- Meeting Moderation
  - On track and on time
  - Smaller Work Group meetings may be needed
Issue/Risk Management

- What is a Risk?

- What is an Issue?
Issue/Risk Management

- Issue or Risk?
Issue/Risk Management

- Any SIS Team member can raise an Issue or Risk.
- Issues & Risks vetted through Work Group Meetings
- Escalation Process
Status Reporting

- Weekly Status Reporting
- [Individual-after IDPs] > Work Group > PMO Status Report
- Templates out on SharePoint
- Status Reports will live on SharePoint
Status Reporting

Individual Status Reports
(After IDPs)

Work Group Status Report
Due COB Thursdays

PMO Status Report
Due COB Mondays

Work Group Lead Meetings

PMO Status Meeting
Tuesdays @ 4pm
Documentation Repository: SharePoint

We've Got to Crack Down on File Sharing...
Documentation Repository: SharePoint

LIVE DEMO

I ALSO LIKE TO LIVE DANGEROUSLY
Questions?
Project Team Training & IDP Schedules

Mark Burison, Senior Consultant
Sierra-Cedar
SIS Project Director
## Project Team Training Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Topic</th>
<th>Trainer/Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Team Training</td>
<td></td>
<td><strong>Intro to Campus Solutions</strong></td>
<td>Karen Nixon</td>
</tr>
<tr>
<td>Wednesday Feb 24</td>
<td>8:30a - 4:00p</td>
<td>- 2 one-day formal training sessions</td>
<td>Sunshine Skyway Conference Room</td>
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<tr>
<td></td>
<td></td>
<td>- Participants select 1 one-day class to attend</td>
<td>Enterprise Systems</td>
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<tr>
<td></td>
<td></td>
<td>- Terminology and Navigation</td>
<td>Building 1603</td>
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<tr>
<td></td>
<td></td>
<td>- Accessing Components and Pages</td>
<td>2140 NE Waldo Road</td>
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<tr>
<td></td>
<td></td>
<td>- Effective Dating</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>- Translate Tables</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Running Processes and Reports</td>
<td></td>
</tr>
<tr>
<td>Thursday Feb 25</td>
<td>8:30a - 4:00p</td>
<td><strong>Intro to Campus Solutions</strong></td>
<td>Karen Nixon</td>
</tr>
<tr>
<td></td>
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<tr>
<td></td>
<td></td>
<td>- Running Processes and Reports</td>
<td></td>
</tr>
<tr>
<td>Monday Mar 14 –</td>
<td>8:30a - 4:00p</td>
<td><strong>Academic Structure Overview</strong></td>
<td>Karen Nixon</td>
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<tr>
<td>Tuesday Mar 15</td>
<td></td>
<td>- 2 two-day formal training sessions</td>
<td>Location – T.B.D.</td>
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<tr>
<td></td>
<td></td>
<td>- Participants select 1 two-day class to attend</td>
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<tr>
<td>Wednesday Mar 16 –</td>
<td>8:30a - 4:00p</td>
<td><strong>Academic Structure Overview</strong></td>
<td>Karen Nixon</td>
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<tr>
<td>Thursday Mar 17</td>
<td></td>
<td>- 2 two-day formal training sessions</td>
<td>Location – T.B.D.</td>
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<tr>
<td></td>
<td></td>
<td>- Participants select 1 two-day class to attend</td>
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## Interactive Design & Prototyping (IDP) Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Topic</th>
<th>Facilitator</th>
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</thead>
<tbody>
<tr>
<td>Monday, Feb 29 – Thursday, Mar 25</td>
<td>Mon – Wed: 8 -12; 1-4</td>
<td>Campus Community IDPs</td>
<td>Laura Beth Robbins, Jeff Rivell</td>
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<td>Thurs: 8 -12</td>
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<tr>
<td>Monday, Mar 28 – Thursday, Apr 7</td>
<td>Mon – Wed: 8 -12; 1-4</td>
<td>Academic Structure IDPs</td>
<td>Nancy Wiegand</td>
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<td>Thurs: 8 -12</td>
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<tr>
<td>Monday, Apr 11 – Thursday, Jun 30</td>
<td>Mon – Wed: 8 -12; 1-4</td>
<td>Core Module IDPs</td>
<td>Sierra-Cedar Leads</td>
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<td></td>
<td>Thurs: 8 -12</td>
<td>▪ Admissions</td>
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<td>▪ Student Records</td>
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<td>▪ Academic Advising</td>
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<td>▪ Financial Aid</td>
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<tr>
<td></td>
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<td>▪ Student Financials</td>
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</table>
Closing Remarks & Questions

Jim Freymann, Associate Director
UFIT
SIS Project Director