

## Monthly Executive Status Report – January 2010

### *The Rufus Initiative*

Report Prepared By: Shelley Ruff

<i>Program Champion:</i>	<i>President McDavis</i>
<i>Executive Sponsors:</i>	<i>J. Brice Bible, Pam Benoit</i>
<i>OHIO Program Director:</i>	<i>Shelley Ruff</i>
<i>CIBER Project Director:</i>	<i>Chris Mercer</i>

### **Highlights**

- Collected IdM/MDM data record flow requirements and selected IdM Functional Lead
- Work has begun on integration between Online Graduate Appointments and PeopleSoft Campus Solutions
- Presentation and overview of Rufus Initiative Advisory Group and introduced Student Center to Rufus Initiative Advisory Group
- SOA required software is available and commercial support has been purchased
- CRM Project Manager from Campus Management assigned and installation has begun
- Met with FTAG to discuss Reporting requirements
- Data conversion and configuration activities for Campus Solutions are progressing well
- Portal vendor has been chosen and Statement of Work in final negotiations
- Training Plan set forth to indicate plans through June 2011 go-live
- The Enterprise Reporting & Intelligence team is conducting requirement sessions specific to student-related data
- DARS upgrade is progressing with the install of Darwin 3.5.9
- The Admissions team has entered courses eligible for transfer credit and continue to write transfer equivalency rules

### **Communication Log**

- Web news story items (items not hyperlinked below appeared as short blurbs on the [project home page](#)):
  - [NextGen Update: Winter Break Progress](#)
  - Board of Trustees – dashboard update – January 15
  - Rufus Initiative Advisory Group – January 20
  - FTAG – requirements gathering for ERI needs – January 25
  - ITAC – dashboard update and preview of Faculty Center – January 27
  - Communications Activities – January 2010

Campus Emails	0
Web Postings	1
Events (Open and Targeted Audience)	5
Printed Media	0
News Articles/Press Releases	1
Executive Briefings	4

### **Upcoming Events**

- February 2 thru 4 – Ciber Center for Project Performance review with John Sanguinetti
- February 3 – Rufus Initiative Student Advisory Group kickoff
- February 5 – Rufus Initiative update at Regionals Meeting
- February 9 – Faculty Policy Advisory Group meeting to review EPSA presentation and full-time status
- February 16 thru 19 – Universal Productivity Kit (UPK) training with functional team members
- February 24 – Capital Oversight Group Meeting
- February (date tbd) – FTAG Security discovery

## Program Schedule –34% Completed



Some Delays

Summary of Upcoming Major Milestones – includes next month’s detail		
Schedule Summary	Target Timeframe	Status
Procure Portal solution	Sep 09	In Progress – Delayed 5 months
Assign resources for IdM	Sep 09	Completed
Assign resource for PS Security Administration	Sep 09	In Progress – Anticipated Feb 10
Assign resource for PS Application Administration	Sep 09	In Progress – Anticipated Feb 10
Assign resource for BI Application Administration	Sep 09	Completed
Train technical resources on JBoss Enterprise Platform	Jan 10	Completed
Prepare CRM resources, hosting environment	Feb 10	In Progress
Complete Integration Inventory & assign resources	Feb 10	In Progress
Build IdM / MDM technical design	Feb 10	In Progress
Train functional resources on UPK	Feb 10	Not started
Initiate SOA Integration Services Build	Mar 10	Not started
Complete DARS Upgrade	Mar 10	In Progress
Deploy IdM / MDM	Apr 10	Not Started
Deploy CRM	Jul10	Not Started
Deploy Portal	Aug 10	Not started
Deploy Admissions	Aug 10	Not started
Deploy Student Financial Aid	Nov 10	Not started
Deploy Student Records	Dec 10	Not started
Deploy Student Financials	May 11	Not started
Deploy Final Student Records	June 11	Not started
Deploy Q2S conversion	Apr 12	Not started

## Program Budget



On budget

	Allocated Budget	Expensed to Date	Budget Remaining	Contingency Balance*	Reserve Balance (Anticipated Savings)
Campus Solutions	\$15,063,469	\$2,504,494	\$12,558,975	\$2,106,083	\$666,650
SOA	\$850,275	\$527,710	\$322,565		
IdM/MDM	\$1,981,700	\$795,716	\$1,185,984		
Portal	\$616,404	\$76,440	\$539,964		
CRM	\$816,836	\$739,018	\$77,818		
DARS/Transfer Credit	\$457,260	\$23,400	\$433,860		
ERI	\$741,000	\$101,400	\$639,600		
Security Assessment	\$308,000	-0-	\$308,000		(\$308,000)
Operating Expenses**	\$1,883,000	\$47,491	\$1,835,509		
<b>Total Project</b>	<b>\$22,717,944</b>	<b>\$4,815,669</b>	<b>\$17,902,275</b>	<b>\$2,106,083</b>	<b>\$358,650</b>

\*Contingency Balance is held in the Campus Solutions account and is available to all projects.

\*\*Operating Expenses are allocated quarterly to the project.



1. **PeopleSoft Campus Solutions** - progressing without delays relative to configuration and conversion. Discussions surrounding integrations between PeopleSoft and OnBase have begun. QAS software for address verification is going has been approved preliminarily and awaiting a Data Sample for Business Office. PS Application Administrator and PS Security Administrator have been selected
2. **Service Oriented Architecture (SOA)** – continuing to document business processes and integration flows (as is and to be state). Review of integration with Hyland OnBase has begun. Required software is available and commercial support has been purchased. Services contract is pending to mentor and assist OHIO staff in the development of an initial selection of integrations to PeopleSoft; Vendor expected onsite March 1.
3. **Identity Management (IdM)** – Selected IdM Functional Lead. OHIO resources have been assigned and working on the transition plan. The scope and deliverables are being evaluated to bring the project back to an acceptable timeline.
4. **Person Master Data Management (MDM)** – studying the ability of the future IdM solution to accomplish the goal of storing, and securing sensitive identity-related data, and the connection of IdM to the PeopleSoft Constituent Web Services functionality to ensure unique identity data. This decision will be made in conjunction with the IdM solution, and may result in a separate product buy and/or services contract.
5. **Portal** – negotiations with the top service providers. No software purchase is needed. The scope and deliverables will be evaluated to bring the project back to an acceptable timeline.
6. **Constituent Relationship Management (CRM)** – procurement completed December 18 which includes the purchase of software licenses, support and professional services. CMC is expected onsite the 1<sup>st</sup> week of February. Discussed timeline and CMC resources and the OHIO technical resource is in place and is installing the development environment.
7. **DARS Upgrade/Transfer Credit** - the team has installed the Darwin 3.5.9, with 20% coding completed to be completed by March 2010. CIBER has been working with OHIO to assist in the planning for conversion and implementation of Campus Solutions transfer credit. The Admissions team has entered courses eligible for transfer credit and will continue to write transfer equivalency rules.
8. **Enterprise Reporting and Intelligence (ERI)** – environments are being prepared and resources have been assigned. The team is conducting requirement sessions specific to student -related data. Sessions are completing for Institutional Research, and recently began for faculty. Data sources have been identified to build a data mart POC.