

<p>Monthly Executive Status Report – October 2010</p> <p><i>The Rufus Initiative</i></p> <p>Report Prepared By: Shelley Ruff</p>	<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

- Undergraduate Admission Acknowledgement and Admittance letters are being sent to applicants. Additional admissions offices, including Regionals, College of Medicine, Graduate College, and LLDL/Outreach will go live according to their specific needs.
- Schedule of Classes pilot was a success. Student Records team is preparing for December university-wide Schedule of Classes rollout.
- Student Records team will be focusing much of their efforts on the enrollment conversion during the next few months.
- Financial Aid team is preparing for their go-live of the Gateway Scholarship awarding, and the team training will begin in mid-November.
- Student Financials team has completed initial validation of the extremely complex OHIO multi-campus tuition calculation in PeopleSoft. This eliminates the need for an expensive system modification. Congratulations to the team!
- Work continues on the Transfer Credit module, and external course catalogs are successfully being loaded.
- CRM project team continues to train on the new Talisma recruiting software, and build additional functionality into online inquiry and data entry forms.
- ERI project team continues to focus on the reporting needs for Institutional Research and Admissions operational reporting.
- Portal team continues to build additional content into “My OHIO” <https://my.ohio.edu/>.
- Amentra continues their onsite mentoring of OHIO staff on integration development.
- IdM team continues to test the account creation functionality and PeopleSoft integration.

Communication Log

- Rufus Initiative Training Website is now live: [Rufus Initiative: Training Home](#)
- Web news story items (items not hyperlinked below appeared as short blurbs on the [project home page](#)):
 - [Schedule of Classes pilot group prepares for December transition](#)
 - [Screen shots of PeopleSoft and Astra Schedule](#)
 - [Admissions Overview](#)
 - [Rufus Intro Video](#)
 - Communications Activities
 - Campus Emails 3
 - Events (Open and Targeted Audience) 2
 - Web Postings 4
 - Executive Briefings 2

Upcoming Events

- November 2 – Rufus Initiative Advisory Group
- November 3 – Undergraduate Student Senate Presentation of PeopleSoft Student Center
- November 4 – PeopleSoft Financial Aid training begins

- November 8 – Graduate Student Senate Presentation of PeopleSoft Student Center
- November 18 – FTAG discussion of Faculty/Advisor Center

Program Schedule – 7 months remaining



Some Delays

Summary of Upcoming Major Milestones – includes next month’s detail			
Schedule Summary	Target Timeframe	Status*	
Deploy IdM - Account Creation, Activate Account, Single Sign-On and Access Requisitions	Jul 10	In Progress	●
Deploy Enterprise Reporting Intelligence Solution	Aug 10	In Progress	●
Deploy Admissions	Aug 10 – Mar 11	In Progress – Athens Freshmen, International, Transfer, Graduate, Regionals, LLDL and OUCOM	●
Deploy PeopleSoft Student Center – Applicants	Nov 10	Complete – Athens Freshmen In Progress – Freshmen International, Transfer, Graduate, Regionals, LLDL and OUCOM	●
Conduct Security Assessment	Oct10	Complete	●
Deploy Student Records – Schedule of Classes (pilot only)	Oct 10	Complete	●
Deploy Student Financial Aid – Gateway Scholarship Awarding	Nov 10	In Progress	●
Deploy Student Records – Schedule of Classes (campus wide)	Dec 10	In Progress	●
Deploy Transfer Credit	Jan 11	In Progress	●
Deploy Portal – Current students, faculty, staff	Mar 11	In Progress	●
Deploy PeopleSoft Student Center & Faculty Center – Current students, faculty, staff	Mar 11	In Progress	●
Deploy CRM Phase II	Mar 11	In Progress	●
Deploy Student Records – remaining modules	Mar 11	In Progress	●
Deploy Student Financial Aid	Mar 11	In Progress	●
Deploy Student Financials (Item types deployed)	May 11	In Progress	●
Deploy Q2S conversion	Apr 12	Not started	●

*Status Indicators: ● - High Risk; ● - Caution; ● - No Significant Issues



	Current Budget	Expensed to Date	Committed to Date	Forecasted Spend	Forecasted Available	Forecasted Spend after June 2011
Campus Solutions	\$4,859,400	\$2,938,528	\$1,920,872	\$4,859,400	\$ -	\$288,000
ERI	\$741,000	\$508,950	\$232,050	\$741,000	\$ -	\$ -
Portal	\$468,000	\$206,076	\$261,924	\$468,000	\$ -	\$ -
SOA	\$686,925	\$569,962	\$116,963	\$686,925	\$ -	\$ -
DARS/Transfer Credit	\$450,660	\$88,725	\$246,675	\$335,400	\$115,260	\$ -
MDM	\$755,760	\$ -	\$ -	\$ -	\$755,760	\$755,760
IdM	\$811,000	\$598,854	\$98,729	\$697,583	\$113,417	\$ -
Harco (ID Cards)	\$120,000	\$ -	\$ -	\$ -	\$120,000	\$120,000
CRM	\$528,670	\$429,547	\$98,949	\$528,670	\$ -	\$ -
Security Assessment & Other 3rd Party	\$796,000	\$431,827	\$111,573	\$543,380	\$252,620	\$ -
Hardware	\$1,750,000	\$1,265,417	\$171,751	\$1,437,168	\$312,832	\$ -
Staffing	\$4,503,280	\$2,360,406		\$4,503,280	\$ -	\$773,326
Contingency -Amentra \$78,580 -Ciber \$553,000 -CMC \$8,000 -Unicon \$5,000	\$2,106,083	\$38,826	\$606,554	\$1,460,703	\$645,380	\$ -
Reserves	\$467,720	\$ -	\$5,420	\$5,420	\$462,300	\$ -
Total Bond (Task 04)	\$19,044,498	\$9,437,118	\$3,871,460	\$16,266,929	\$2,777,569	\$1,937,086
Original Local (Task 05)*	\$3,673,446	\$1,338,902	\$196,039	\$2,551,755	\$68,640	\$68,640
Total Project (as of 2/13/09) (Task 04, 05)	\$22,717,944					
<i>Less Local Funds Not Requested (Task 05)**</i>	<i>\$1,121,691</i>				<i>\$1,121,691</i>	
Total Project	\$21,596,253	\$10,776,020	\$4,067,499	\$18,818,684	\$3,967,900	\$2,005,726

* Local Money (Task 05) includes training, maintenance, and operating expenses that are all allocated quarterly.

**Less Local Money (Task 05) indicates the amount the Rufus Project will not ask to be allocated.



1. **PeopleSoft Campus Solutions** - progressing with some delays as noted below in “Principal Concerns.” The Campus Solutions team has collaborated on the academic structure with various university constituents. The structure has been approved and is currently in production. Modifications continue to be reviewed and minimized, developed, and tested. The Graduate, Regionals, LLDL/Outreach, and College of Medicine admissions groups are preparing requirements for upcoming applicant go-live dates. Financial Aid is completing their final testing in preparation of the implementation of the Gateway Scholars program.
2. **Service Oriented Architecture (SOA)** – the team deployed the first series of production services in support of the PeopleSoft/Hyland integration for admissions document processing and admissions document review. Work continues on the Talisma integration as well as the integrations for account creation and single sign-on functionality.
3. **Identity Management (IdM)** – the team is conducting user validation and testing of specific identity creation, resource provisioning, and identity reconciliation.
4. **Person Master Data Management (MDM)** – the project is currently on hold pending a refined MDM strategy.
5. **Portal** – the team continues to build uPortal and the PeopleSoft portlet for applicants is under review and production ready pending single sign-on. Phase II of the Portal project activities began in late September and are expected to last through early 2011.
6. **Constituent Relationship Management (CRM)** – end-user training is currently being conducted throughout the Undergraduate Admissions department with other admitting centers to follow that include Regionals, College of Medicine, Graduate College and LLDL/Outreach.
7. **DARS Upgrade/Transfer Credit** - the team has installed the Darwin 3.5.8 with the majority of the coding complete with meetings scheduled to begin next phase. The Transfer Credit team continues loading courses and international grading schemes. Work has begun on the Transfer Credit modification for a January go-live readiness.
8. **Enterprise Reporting and Intelligence (ERI)** – the ERI team has been working diligently to complete views and reports in preparation of final testing for Undergraduate Admissions and Institutional Research areas.
9. **Principal Concerns** – immediate action has been taken to provide needed resources to both the ERI and the IdM projects. This action consists of staff reallocation, staff relocation, and a consultant change order. These initiatives will be monitored closely to ensure deliverables are acceptable and timelines are being met.