

Monthly Executive Status Report – May 2011

The Rufus Initiative

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Highlights

- All Admission centers have finalized their CollegeNet applications and data integrations to PeopleSoft. Testing continues for eLearning OHIO and OPIE. The admission centers of Graduate College, Regional Campuses, eLearning OHIO, and OPIE are modeling their admission workflow based on the Undergraduate Athens campus processes. The Graduate College is conducting testing of their workflow.
- The Transfer Credit team has completed the majority of their go-live activities and has been focused on training and supporting the university on entering and evaluating transfer credit.
- Congratulations to the Student Records team! The fall registration went very well and students have been registering around the clock. Additionally, the team continues to conduct user training across the university, and specific training schedules can be found at www.ohio.edu/rufus.
- The Financial Aid team has been diligently testing upper class awarding and will notify the students of their award status within the first week of June.
- Congratulations to the Student Financials team! The team successfully converted balances due, assessed summer tuition, and produced paper check and direct deposit refunds.
- The ERI project team continues to develop and deliver reporting solutions based on the needs of Institutional Research, Admissions, Schedule of Classes, Financial Aid, Transfer Credit, Student Records and Enrollment, Student Financials, and Space Utilization. The most urgent deliveries include those related to student enrollment data.
- The Portal team continues to build additional content into “My OHIO” <https://my.ohio.edu/> and continues releasing new content for Student Financials, Financial Aid and Faculty and Advising Center.
- The IdM team has been working to operationalize the processes of person account creation and PeopleSoft integration. They are also working on features of account reconciliation, single sign-on and online system access. Design meetings for the IdM2 project (formerly MDM) are underway.

Communication Log

- The Training website for the Rufus Initiative is available at: [Rufus Initiative: Training Home](#)
- Web news story items (items not hyperlinked below appeared as short blurbs on the [project home page](#)):
 - [New OU registration system getting mixed reviews](#)
 - [How to register for fall](#)
 - [Fall advising and registration update](#)
 - [Advisee Lists tool preview screen shots](#)
 - Communications Activities
 - Campus Emails - 3
 - Events (Open and Targeted Audience) – 2
 - Web Postings – 4
 - Executive Briefings – 1

Upcoming Events

- June 8 - Rufus Initiative Advisory Group
- June 20 – SIS Informs will become Read-Only



Summary of Upcoming Major Milestones – includes next month’s detail			
Schedule Summary	Target Timeframe	Status*	
Deploy Enterprise Reporting Intelligence Solution	Ongoing	In Progress	●
Deploy Portal – Current students, faculty, staff	Ongoing	In Progress	●
Deploy PeopleSoft Student Center & Faculty Center – Current students, faculty, staff	May 11	Complete	●
Deploy Student Records – remaining modules	May 11	In Progress - development delays	●
Deploy Student Financial Aid	May 11	In Progress - development delays	●
Deploy Student Financials (Item types deployed)	May 11	In Progress - development delays	●
Deploy ASG Zena Production Scheduler	Jul 11	Test environment ready	●
Deploy IdM - Single Sign-On	Aug 11	In Progress	●
Conduct System Load Testing	Aug 11	In Progress	●
Deploy CRM Phase II	TBD	n/a	
Deploy Q2S conversion	Apr 12	Environments are prepped and ready for use.	●

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

Program Budget - 78% Spent



On budget

	Current Budget	Expensed to Date	Committed to Date	Forecasted Spend	Forecasted Available	Forecasted Spend after June 2011
Campus Solutions	\$4,859,400	\$4,088,838	\$770,562	\$4,859,400	\$0	\$288,000
ERI	\$741,000	\$741,000	\$0	\$741,000	\$0	\$0
Portal	\$468,000	\$345,137	\$122,863	\$468,000	\$0	\$0
SOA	\$686,925	\$681,064	\$0	\$681,064	\$5,861	\$0
DARS/Transfer Credit	\$373,900	\$274,365	\$61,035	\$355,600	\$18,300	\$0
MDM	\$755,760	\$0	\$0	\$0	\$755,760	\$755,760
IdM	\$811,000	\$670,964	\$26,619	\$669,747	\$141,253	\$0
Harco (ID Cards)	\$120,000	\$0	\$0	\$0	\$120,000	\$120,000
CRM	\$528,670	\$452,843	\$75,653	\$528,670	\$0	\$0
Security Assessment & Other 3rd Party	\$796,000	\$550,832	\$183,284	\$834,116	\$191,776	\$0
Hardware	\$1,650,000	\$1,454,603	\$1,838	\$1,456,441	\$200,197	\$0
Staffing	\$4,503,280	\$4,041,387	\$0	\$4,301,169	\$202,111	\$773,326
Contingency -Amentra \$252,518 -Ciber \$1,302,600 -CMC \$13,500 -Unicon \$5,000	\$2,282,843	\$1,542,109	\$720,891	\$2,156,329	\$126,514	\$0
Reserves	\$467,720	\$5,420	\$0	\$5,420	\$462,300	\$0
Total Bond (Task 04)	\$19,044,498	\$14,848,562	\$1,962,745	\$17,056,956	\$2,224,072	\$1,937,086
Original Local (Task 05)*	\$3,673,446	\$1,738,374	\$316,561	\$2,386,757	\$0	\$0
Total Project (as of 2/13/09) (Task 04, 05)	\$22,717,944					
<i>Less Local Funds Not Requested (Task 05)**</i>	\$1,286,689					
Total Project	\$21,431,255	\$16,586,936	\$2,279,306	\$19,443,713	\$2,224,072	\$1,937,086

* 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. Principal Concerns

- a. **Reporting Deliverables** - the ERI team continues to work to overcome previous delays due to a change in scope and the allocation of resources. While several departmental-level reporting solutions have been delivered, the team continues to work toward delivering and supporting university-level solutions. Securing the appropriate staffing level continues to be a challenge.
- b. **Identity Management Solution** - the IdM initiative is progressing forward, but the team continues to work to overcome major delays in single sign-on, and providing a solution for campus access to the new system.
- c. **Development Staff Allocation** - the development effort for PeopleSoft modifications and integrations exceeds the assigned resource levels. This jeopardizes required deliverables beginning with those in January 2011. Several plans have been put into place including: (i) Assigning additional consulting development staff; (ii) Deferring the deliverable or a portion of the deliverable, and (iii) Analyzing the estimated effort and proposed solution. The Technical Development Plan will continue to be adjusted to provide for a solution toward meeting the required deliverables.

2. PeopleSoft Campus Solutions - progressing with some delays as noted in “Principal Concerns.” The Campus Solutions team is working through final testing of converted data and continues to assign appropriate access to PeopleSoft users. All admissions groups are now live and admitting students in PeopleSoft. eLearning OHIO and OPIE are expected to finalize their CollegeNet online applications in June. The Student Records team did not experience any issues with production for fall registration. Financial Aid is well underway with their Gateway Scholars program and continues to load FAFSA data in preparation for continuing student financial aid awards. The Student Financials experienced a successful go live with direct deposit, refunds and tuition assessment.

3. Identity Management (IdM) – the team is conducting user validation and testing of specific identity creation, resource provisioning, and identity reconciliation. Work continues with single sign-on and providing a solution for campus access.

4. Person Master Data Management (MDM) – the team is working to refine an MDM strategy leveraging current product functionality.

5. Portal – the team is working on the next phase of the Portal project, which is focused on the Faculty and Advisor services. The Portal team has prepared the Portal for incoming freshmen to accept FAFSA funding and enroll for summer classes.

6. Constituent Relationship Management (CRM) – pending Phase 2 which includes Event Management.

7. Transfer Credit - the team has completed the majority of their go-live activities, and has been focused on training the university on the new transfer credit data entry and evaluation processes.

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 Dashboard, Transfer Credit, and Institutional Research areas. The team is working on reporting

requirements for Schedule of Classes, Space Utilization, Financial Aid, Graduate and Regional Admissions, Student Records and Enrollment, and Student Financials.

9. **Security Review** – the OHIO Board of Trustees requested a security review of sensitive data creation, storage and processing within PeopleSoft Campus Solutions. In November, the team received the report from CDW-G, and has presented the initial findings to OHIO’s department of Internal Audits as well as the Board of Trustees. The management responses are in progress. Additionally, CIBER conducted a review that identified where each sensitive data element is presented and all associated data tables. Each responsible OHIO department will be asked to respond with their levels of protection.