

Monthly Executive Status Report – July 2009 <i>The Rufus Initiative</i> <i>Report Prepared By: Shelley Ruff</i>	<i>Program Champion:</i>	<i>President McDavis</i>
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	<i>OHIO Program Director:</i>	<i>Shelley Ruff</i>
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Highlights

- Environments readied for team use, including DEMO, Configuration, Conversion and Sand Box
- Hardware RFP responses received and are being evaluated
- CRM vendor decision has been made and negotiations have begun
- Configuration efforts are ahead of schedule in several areas
- Project website content is updated and available for campus access
- Stories were published on the IdM and CRM procurement progress
- Documentation standards are being established for service and change management processes

Upcoming Events

- August 3 – 7: Campus validation of base biographic and demographic data (expect more than 40 stakeholders)
- August 3 – 7: Portal requirements presented to campus for input
- Mid September: Campus validation of academic structure
- ITAC Review- September 24
- Fall (date tbd) – initial presentation of base system configuration to faculty, staff, students

Program Schedule –






On schedule

Summary of Upcoming Major Milestones – includes next month’s detail		
Schedule Summary	Target Timeframe	Status
Procure CRM solution	Aug 09	In Progress
Procure IdM solution	Aug 09	In Progress
Deliver Portal RFP to vendors	Aug 09	In Progress
Conduct Campus Community validation sessions	Aug 09	In Progress
Deploy IdM	Apr 10	Not started
Deploy CRM	Apr 10	Not started
Deploy Portal	Jul 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

	Allocated Budget	Expensed to Date	Budget Remaining	Reserve Balance (Savings)
Campus Solutions	\$15,371,469	\$785,903	\$14,585,566	
SOA	\$850,275	\$184,421	\$665,854	
IdM	\$1,118,300	-0-	\$1,118,300	
Portal	\$616,404	\$76,440	\$539,964	
CRM	\$816,836	-0-	\$816,836	
RedLantern DARS	\$457,260	-0-	\$457,260	
Reporting and DW	\$741,000	\$31,200	\$709,800	
MDM	\$863,400	-0-	\$863,400	
Operating Expenses*	\$1,883,000	-0-	\$1,883,000	
Total Project	\$22,717,944	\$1,077,964	\$21,639,980	-0-

*Operating Expenses are allocated quarterly to the project; budget allocation is currently \$297,250.

(T) TIME	(B) BUDGET	(S) SCOPE
 GREEN	 GREEN	 GREEN
g: current phase on schedule	g: little or no budget variance & there is funding flexibility	g: all major deliverables will be implemented as planned
y: current phase delayed; overall project on schedule	y: budget variance less than 10% & there is still funding flexibility	y: a major deliverable will be delayed to a later phase
r: overall critical path delayed by schedule change	r: budget variance >10% or a variance with no funding flexibility	r: a major deliverable will not be implemented

Monthly Progress and Status Summary

- 1. PeopleSoft Campus Solutions** is progressing without delays. The team has completed configurations for the shared bio/demographic module known as Campus Community, and will conduct validation sessions to more than 40 stakeholders across campus during the 1st week of August. Conversion efforts are ahead of schedule as 100,000 bio-demographic records were loaded during the first iteration. The records will be reviewed and updates will be made for subsequent iterations.
- 2. Service Oriented Architecture (SOA)** – the final SOA Roadmap document was delivered and accepted on schedule and within budget. The team is analyzing the roadmap to determine the approach for building out the service integration strategy.
- 3. Identity Management (IdM)** – vendor responses have been reviewed and the top two vendors have been invited to campus to demonstrate their products.
- 4. Person Master Data Management (MDM)** – due to a change in product strategy at Oracle, OHIO has been forced to change the original MDM strategy, and this presents a slight risk of delay to the underlying master data solution. The team will study 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.
- 5. Portal** – initial requirements have been gathered and presented for campus-wide input. The RFP is expected to be released to vendors by August 10th.

6. **Constituent Relationship Management (CRM)** – vendor product demonstrations were conducted during the week of July 20th and participant evaluations were analyzed. The team is working with Procurement to negotiate the purchase of the CRM product as well as the implementation services.
7. **RedLantern DARS u.achieve Transfer Articulation** – CIBER has subcontracted with RedLantern to conduct a student transfer fit/gap review. This is on schedule and is planned to occur during September.
8. **Reporting and Data Warehouse** – Requirements are being collected from across campus and are focused on student and business-related data. The requirement process is scheduled to be completed early in September.