

<p>Monthly Executive Status Report – August 2009</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




- Data conversion activities for Campus Solutions are progressing well ahead of schedule.
- Configuration efforts are ahead of schedule in several areas.
- Reduced number of charge codes from the current 24,000 to 400 in PeopleSoft
- Completed initial review of requested modifications and integrations -- preliminary approval for development of functional specifications of one (1) initial modification for each area.
- Testing the Project Change Control and Review process.
- Portal RFP sent to vendors August 18th.
- Hardware RFP responses received and are in evaluation stage.
- CRM vendor negotiations underway.
- SOA approach reviewed and approved by OHIO stakeholders.
- Bi-weekly Capital Project Oversight Group meetings progressing.

Communication Log

- Campus Community validation completed (attended by more than 60 campus stakeholders).
- Rufus Initiative and NextGen Network update – e-mail to all students.
- Novacoast (software integration tools) vendor demo – IT listserv announcement.
- Academic Structure validation sessions – invitations sent to stakeholders.
- Web news story items:
 - Feedback requested on portal requirements
 - Fall quarter fee to appear on student bills
 - Faculty, staff help refine PeopleSoft’s Campus Community module
 - At a Glance: Admissions & Financial Aid, plus portal and CRM procurement

Upcoming Events

- September 2nd, 8th – Institutional Intelligence & Reporting Validation
- September 16th, 17th – redLantern DARwin/Peoplesoft Integration Discovery Sessions
- September 21st, 23rd, 24th – Academic Structure Validation
- September (tbd) - Modification and Integration Review with Brice Bible, Pam Benoit
- September (tbd) – Faculty Technology Advisory Group – Faculty Center Design Workshop
- Fall (date tbd) – Initial presentation of base system configuration to staff, students

 (T) TIME	 (B) BUDGET	 (S) SCOPE
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

Program Schedule – 14% Completed



On schedule

Summary of Upcoming Major Milestones – includes next month’s detail		
Schedule Summary	Target Timeframe	Status
Procure CRM solution	Sep 09	In Progress
Procure IdM solution	Sep 09	In Progress
Acceptance of Institutional Intelligence Roadmap	Sep 09	In Progress
Determine MDM solution	Sep 09	In Progress
Initiate DARS Upgrade	Sep 09	In Progress
Procure Hardware (>\$1m spend)	Oct 09	In Progress
Deploy IdM / MDM	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



On budget

	Allocated Budget	Expensed to Date	Budget Remaining	Contingency Balance	Reserve Balance (Anticipated Savings)
Campus Solutions	\$15,371,469	\$785,903	\$14,585,566	\$1,967,855	\$666,650
SOA	\$850,275	\$184,421	\$665,854	\$11,700	
IdM	\$1,118,300	-0-	\$1,118,300	\$3,900	
Portal	\$616,404	\$76,440	\$539,964	\$23,400	
CRM	\$816,836	-0-	\$816,836	\$4,875	
redLantern DARS	\$457,260	-0-	\$457,260	\$21,618	
Reporting and DW	\$741,000	\$31,200	\$709,800	\$37,050	
MDM	\$863,400	-0-	\$863,400	\$1,950	
Operating Expenses*	\$1,883,000	-0-	\$1,883,000	\$33,735	
Total Project	\$22,717,944	\$1,077,964	\$21,639,980	\$2,106,083	\$666,650

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



1. **PeopleSoft Campus Solutions** is progressing without delays. The team has completed configurations for the shared bio/demographic module known as Campus Community, and the initial setup has been successfully validated by campus stakeholders. Conversion efforts are ahead of schedule and more than 500,000 bio-demographic records were loaded during the first iteration. The records will be reviewed and updates will be made for subsequent iterations. Each team is working with their campus constituents to validate configurations and study their business needs. Functional Leads have completed their first modification request and these will be presented to the Executive Steering Committee for review and advice.
2. **Service Oriented Architecture (SOA)** – presented approach for implementation to stakeholders that diagrams a business process to demonstrate the approach. Also researching SOA software options.
3. **Identity Management (IdM)** – second vendor demonstration completed and currently collecting participant feedback.
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.
5. **Portal** – RFP went out August 18th and discussions on staffing the initiative ensue.
6. **Constituent Relationship Management (CRM)** – discussed timeline for implementation along with resources (functional and technical) that will be assigned to implementation.
7. **redLantern DARS u.achieve Transfer Articulation** – developed detailed agenda for September 16th and 17th. Began drafting the SOW that includes the deliverable for portion of redLantern engagement.
8. **Reporting and Data Warehouse** – Conducted discovery meetings, researched tool sets including meetings across campus to discuss reporting needs. Continued Roadmap documentation and analysis.