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| <b>Monthly Executive Status Report – September 2009</b><br><br><i>The Rufus Initiative</i><br><br><i>Report Prepared By: Shelley Ruff</i> | <i>Program Champion:</i>       | <i>President McDavis</i>              |
|   | <i>Executive Sponsors:</i>     | <i>J. Brice Bible,<br/>Pam Benoit</i> |
|   | <i>OHIO Program Director:</i>  | <i>Shelley Ruff</i>                   |
|   | <i>CIBER Project Director:</i> | <i>Chris Mercer</i>                   |

## ***Highlights***

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- Data conversion activities for Campus Solutions are progressing well
- Configuration efforts are ahead of schedule in several areas
- Successfully converted more than 54,000 course catalog records with a very minimal error rate
- To provide for additional project outreach, the Functional Leads will serve as team liaisons to provide guidance and support to the specific needs of the Graduate College, Lifelong and Distance Learning, and the College of Osteopathic Medicine
- Completed initial review of requested modifications and integrations and the Project Directors will meet with the Provost and CIO to discuss the approval process
- Portal RFP responses received.
- Hardware decision made and procurement in process
- Procurement delays for CRM and IdM
- CRM vendor negotiations underway
- SOA plans continuing
- Bi-weekly Capital Project Oversight Group meetings progressing well
- Working with Student Affairs to establish the Student Special Interest Group

## ***Communication Log***

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- Rufus Initiative Advisory Group kickoff
- Transfer Credit Articulation: redLantern DARwin Discovery Sessions completed (attended by 30 campus stakeholders)
- Academic Structure validation completed (attended by 90 campus stakeholders)
- Enterprise Reporting & Intelligence (ERI) discovery sessions completed (attended by 81 campus stakeholders)
- CIO presentation at Administrative Senate: Rufus Initiative and NextGen projects
- Web news story items (items not hyperlinked below appeared as short blurbs on the [project home page](#)):
  - 9/8 Slides from ERI validation sessions available
  - 9/9 [Rufus Initiative part of OIT's "Year of Change"](#)
  - 9/16 [The Big Picture – More than just a new SIS](#)
  - 9/21 Academic Structure validation sessions under way
  - 9/30 [University to Rufus Initiative team on basic setup: "Ok, with some changes."](#)

## ***Upcoming Events***

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- October 1 – Administrative Technology Advisory Group (ATAG) presentation
- October 5 – IdM Decision Point meeting
- October 8 – PeopleSoft Transfer Articulation Discovery Session
- October 9 – Modification and Integration Review with Brice Bible, Pam Benoit

- October 12-14 – SEVIS Discovery Sessions
- October 14-15 – Equation Engine training for Student Financial Aid and Financials teams
- October 19-21 – Portal Vendor demonstrations
- October 20 – Faculty Technology Advisory Group; Faculty Center Design Workshop
- Fall (date tbd) – Initial presentation of base system configuration to staff, students

## Program Schedule –21% Completed



Some Delays

| Summary of Upcoming Major Milestones – includes next month’s detail |                  |                       |
|---|------------------|-----------------------|
| Schedule Summary  | Target Timeframe | Status                |
| Procure CRM solution  | Oct 09           | In Progress – Delayed |
| Procure IdM solution  | Oct 09           | In Progress - Delayed |
| Assign resources for IdM  | Oct 09           | In Progress – Delayed |
| Assign resources for Enterprise Reporting and Intelligence (ERI)    | Oct 09           | In Progress           |
| Determine MDM solution  | Oct 09           | In Progress           |
| Initiate DARS Upgrade   | Oct 09           | In Progress           |
| Procure Hardware (>\$1m spend)                                      | Oct 09           | In Progress           |
| Determine SEVIS solution  | Oct 09           | In Progress           |
| Determine Transfer Articulation solution                            | 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     | \$15,063,469        | \$959,395          | \$14,104,074        | \$2,106,083          | \$666,650                             |
| SOA                  | \$850,275           | \$184,421          | \$665,854           |                      |                                       |
| IdM/MDM              | \$1,981,700         | \$42,000           | \$1,939,700         |                      |                                       |
| Portal               | \$616,404           | \$76,440           | \$539,964           |                      |                                       |
| CRM                  | \$816,836           | -0-                | \$816,836           |                      |                                       |
| redLantern DARS      | \$457,260           | \$23,400           | \$433,860           |                      |                                       |
| ERI                  | \$741,000           | \$78,000           | \$663,000           |                      |                                       |
| Security Assessment  | \$308,000           | -0-                | \$308,000           |                      | (\$308,000)                           |
| Operating Expenses** | \$1,883,000         | \$12,084           | \$1,870,916         |                      |                                       |
| <b>Total Project</b> | <b>\$22,717,944</b> | <b>\$1,375,740</b> | <b>\$21,342,204</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. The procurement of the CRM solution is on the critical path for the Campus Solutions Admissions module. The delays of the CRM procurement are placing the Admissions implementation at risk. Conversion efforts are ahead of schedule and more than 500,000 bio-demographic records were loaded during the first iteration, and more than 54,000 course catalog records were converted with only a 3% error rate. Functional and technical leads are working on their requests for system modifications and these will be presented first to the Provost, and then to the Executive Steering Committee for review and advice. Requests pending to fill the PS Application Administrator and PS Security Administrator positions.
2. **Service Oriented Architecture (SOA)** – continuing to document business processes and integration flows. Also researching SOA software options, finalizing the integrations list and CIBER is working on assigning a lead resource to this effort.
3. **Identity Management (IdM)** – finalizing the vendor decision, which is scheduled for October 5<sup>th</sup>. The procurement cycle is taking longer than expected.
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.
5. **Portal** – RFP responses have been received and vendor demonstrations are being scheduled for the week of October 19<sup>th</sup>.
6. **Constituent Relationship Management (CRM)** – resource assignments have been made and the team is working with the Office of Legal Affairs, Procurement, and Bowling Green State University to complete the procurement process. A hardware sizing questionnaire is being completed to determine the appropriate hosting solution, and the CRM team is reviewing the Statement of Work.
7. **redLantern DARS u.achieve Transfer Articulation** – working on tasks to support the upgrade to Darwin 3.5.9, and preparing for the PeopleSoft Transfer Credit presentation, scheduled for October 8<sup>th</sup>.
8. **Enterprise Reporting and Intelligence (ERI)** – preparing the environments and working with Oracle on licensing requirements for Test and Production. Interviewing CIBER consultants for the ERI lead, and reviewing the delivered ERI Roadmap.