

**From:** Mr. Carmen A. Rahm, Assistant VP for Information Technology

**To:** Information Technology Executive Steering Committee (Dr. Wayne Quirk, Dr. Elizabeth Street, Dr. Charlotte Tullos and Mr. Bill Vertrees)

**Subj:** Fall 2008 Information Technology Executive Report

Executive Steering Committee Members:

The following updates are of projects being overseen by the Enterprise Information Systems (EIS) Governance Team, and the University Information Technology Advisory Committee (UITAC). The EIS Governance Committee meets monthly and focuses on CWU's enterprise applications (i.e. PeopleSoft). The UITAC meets quarterly and focuses on infrastructure and academic related technologies and services. For information on all initiatives and work within the ITS Department, please refer to the ITS Monthly Report and the 2008 State of IT Report.

***Current Major EIS Governance Team Initiatives:***

- Enterprise Information System Data Warehouse: CWU is currently implementing the Campus Solutions (CS) Data Warehouse Module. As Attachment (1) indicates, the December overall project status was "yellow" due to schedule and budget risks. Budget issues have since been resolved, as IT needed permission from the Department of Information Services (DIS) to extend our contract with Cedar-Crestone. This was tentatively approved by DIS in late December. This is a "bleeding edge" project as CWU is one of only a few schools implementing this application. Due to limited functional staff time from Student Administration, Institutional Research is taking the lead "customer/functional" roll on the CS project. Upon completion, we will begin similar projects for Financial Services and Human Resources.
- Budget & Position Control: This project is required to replace the legacy "Position Control" application utilized at CWU. As Attachment (2) indicates, this project is slightly behind schedule due to personnel working on the project also being responsible for daily operational issues and support. It is anticipated that the project schedule will return to a "green" status by mid-January 2009, given no additional daily production/operational issues. This project is aided by software that CWU was able to acquire from Simon-Fraser University to meet our unique needs.
- PeopleSoft FMS 9.0 Upgrade: This is a major upgrade to our Financial Management System. As Attachment (3) shows, the project which is scheduled for completion in late April 2009 is on schedule and within budget. Cedar-Crestone, our consultant on this project, reports that their average consulting contract for an FMS 9.0 upgrade approaches \$1M. We have used a hybrid model of consulting for several years, which has resulted in our contract being only \$250K for this project.
- Hobsons Connect & Retain: Due to its Application Service Provider (ASP) model, this Customer Relationship Management (CRM) project is being managed by Student Affairs and Enrollment Management with ITS support. The project has 2 major components which are "Connect" for connecting to prospective students/applicants, and "Retain" for improving retention of existing students. This project has been ongoing for some time; however "Connect" is scheduled for final implementation in mid-January 2009, and "Retain" is scheduled to go live in February 2009.
- Loan Management System: Replacement of CWU's legacy Loan Management System is required by June 30, 2009. After a lengthy search and contract agreement, we are on track to have the new application online by early June 2009. Delays with this project have been due to scheduling conflicts with the vendor and contract approval delays. While funding and resources for this project are not considered an issue, delays with the vendor may put the June 30, 2009 production goal at risk.

***Current Major UITAC Initiatives:***

- Academic Assessment: The ITS Department is working with the Undergraduate Studies Office, MTIS and others to investigate options for course, program and enterprise level Academic Assessment applications. This effort is in conjunction with the Academic Assessment Team facilitated by Dr. Tracy Pellett. There is currently no formal project for this initiative, as

personnel are reviewing various products on the market. If acceptable options are identified, funding may be sought in late FY09 or early FY10. Some products are already in use by individual departments or colleges at CWU such as the Sedona application in use by the College of Business. Investigation will continue during the Winter Quarter, 2009.

**Other Major Pending/Planned Initiatives:** The following are other major initiatives which are currently being planned or discussed for consideration:

- **Enterprise Document Management System:** In early 2008, CWU conducted a study to develop requirements and cost estimates for an EDMS. The results of that study were extremely successful as an EDMS would provide benefits to departments across the university. A decision was made by the EIS Governance Team to table further discussion on an EDMS due to the limited funding available to acquire such a system at this time. However, the team is pursuing related efforts and sub-projects which may be implemented with technology and services already available at CWU. One of these "in house" projects (Online Time & Labor Reporting) has been put on hold until FY11 due to resource limitations and funding for consulting services. Further discussion on this project will occur in FY10 and FY11.
- **Enterprise TRU-64 Operating System Upgrade:** In 2012, PeopleSoft will no longer support the TRU-64 enterprise operating system (OS) used at CWU. As such, a complete replacement/upgrade to the servers & OS for our PeopleSoft environment is required. This is a major multi-year effort. We have selected HP-UNIX as the replacement OS, and have scheduled the work to coincide with regular server replacements that would occur on a 3 to 4 year basis, to reduce costs. This will primarily be funded from the Computing Infrastructure capital budget. Planning for this effort is underway, with work scheduled to start in FY10 when funding and resources are available.
- **PeopleSoft HRSA 9.0 Upgrade:** Upon completion of the FMS 9.0 upgrade in April 2009, we will immediately commence on the Human Resource/Student Administration (HRSA) Version 9.0 upgrade. This major project includes consultant support of approximately \$450K and is scheduled to be completed in March 2010.

**Potential Issue:** Until FY06, the ITS Department was provided recurring non-base funding of \$350K/year. This funding was viewed as a "holding fund" to be used for regular PeopleSoft upgrades such as this year's FMS 9.0 and HRSA 9.0 upgrades. In FY07 this funding was reduced to \$250K/year, but with reserves from our initial PeopleSoft implementation project it has been adequate to meet the needs of upgrades through the end of FY09. In order to meet the cost estimates for future upgrades, it is critical that the \$250K continue to be provided for FY10 and beyond. When convenient, I am requesting a short IT Executive Steering Committee meeting to discuss this issue. Our goal has always been to return this funding to the \$350K level and include it in base funding. ITS and the EIS Governance Team will always do everything possible to minimize costs for these projects.

Submitted this 31<sup>st</sup> Day of December, 2008:

Carmen A. Rahm  
Assistant Vice-President for Information Technology



## Status Report

# CS Data Warehouse – December 23, 2008

Submitted by: Debbie Feinman

Status Item	Status	Status Notes
<b>Overall Project Status</b>		The overall status of the CS Data Warehouse project is yellow since at least one of the triple constraints (scope, schedule, budget) are in a yellow status
<b>Schedule</b>		The technical implementation is behind schedule. It will remain in Yellow status until the CS Student Records data mart is implemented.
<b>Scope</b>		The scope is confined to the implementation of the Campus Solutions data marts. The business requirements will be documented for IR needs. There are no issues or risks to scope at this point in time.
<b>Budget</b>		Budget is at risk for two reasons. (1) The funding for a technical consultant has nearly been exhausted, and we have not completed the technical implementation. (2) There is no budget for a BI/Reporting tool which is critical for realizing the benefit of a data warehouse.

### CS Data Warehouse Project Summary

#### Overall Status:

The project is in a category of **“Caution”** because there are issues with both schedule and budget.

#### Accomplishments:

1. The CS Steering Committee has decided to proceed with IR in the role of the key functional group. The SA Leads will be in a supporting role to IR (providing information as requested) until the end of February or until Hobson's is implemented.
2. Business and Functional Requirements planning is underway with IR.
3. Bundle 12 has been installed and the OWS layer (detail transactions) has been built.
4. A conference call to discuss technical issues with Oracle EPM and Ascential product support was held December 18<sup>th</sup>.
5. Gene Rau and Don Diebert have met with Carmen Rahm and Bruce Porter to discuss obtaining additional funding for technical consulting through March 2009.

#### Current and Upcoming Activities:




1. Run the HR jobs to complete the Student Records OWS transactional layer build.
2. Run the ETL jobs for the Student Records dimension tables.
3. Run the ETL jobs for the Student Records fact tables.
4. Plan for future bundle releases.
5. Gather business requirements and functional reporting requirements.



## Status Report

### Budget Position Control – December 23, 2008

Submitted by: Barbara Bisson

Status Item	Status	Status Notes
Overall Project Status		The overall status of the Budget Position Control project is in a category of "GOOD". Project scope and effort are in line with the project schedule. Resources are stretched when production issues interfere with team members.
Schedule		The project is approximately 2 weeks behind schedule. The timeline for this project is reasonable if production issues are kept to a minimum. The project resources need to be kept on task with limited production interruptions.
Scope		The project scope has been decreased. Current budgetary concerns will limit enhancement at this time. Team has discussed rolling out enhanced forecasting abilities in a second phase which may be scheduled as the economy improves.

### Budget Position Control Project Summary

#### Overall Status:

The project is in a category of "GOOD".

Production issues have pulled team members away from the project adversely affecting the schedule. Many of the project tasks are dependent on a specific team member. When one team member is pulled off the project to work on a production issue the entire team is affected.

Adjustments have been made to reduce the scope of the budget module due to the current budgetary issues. A Phase 2 budget project may be initiated as the budget outlook improves.

#### Accomplishments:

6. Implemented HR Position Management
7. Utilize PeopleTools Component Interface to load positions into CSPRO
8. Data mapped fields in legacy budget module and PeopleSoft HR tables
9. Initial definition of business rules and processes
10. Set up tables from SFU have been installed

#### Current & Upcoming Activities:

1. Position data will be cleaned up by January 2
2. A fresh load of clean position data will be loaded into CSPRO on January 5
3. Evaluate budget components provided by SFU and adopt those applicable to CWU budget module
4. Update documentation for CWU budget module



## Status Report

### FMS Upgrade 8.8 to 9.0 – December 23, 2008

Submitted by: Tina Short

Status Item	Status	Status Notes
Overall Project Status	Green	The overall status of the FMS Upgrade project is in a category of "GOOD". Project scope, effort and resources are in line with the project schedule.
Schedule	Green	The timeline for this project is reasonable. The project resources need to be kept on task and decisions will still need to be made quickly.
Scope	Green	The project scope is fairly narrow and scope creep will be kept to a minimum. Increases in scope would put the project at risk of budget overruns.

### FMS Upgrade Project Summary

#### Overall Status:

The project is in a category of "GOOD". Few adjustments to the schedule or scope should be required as the project moves forward.

#### Accomplishments:

11. A master test case worksheet has been created (242 tests).
12. A functional consultant has been selected and will be on-site 01/05/09.
13. The Communications Plan has been completed.
14. All customizations have been reviewed and scheduled in the project plan.
15. The project charter was signed off by the sponsoring executives on 11/17/08.
16. All public and private CWU queries have been captured for upgrade 11/17/08.

#### Current & Upcoming Activities:

1. Pass 1 technical upgrade
2. Pass 1 data validation and testing
3. Continued Test & validation script development
4. Query review and analysis
5. Business Process Guides (BPG) organization and development
6. Issue & Risk Management
7. Review & analysis of compare reports
8. Change control process
9. Delta Sessions
10. Business Process Reviews (BPR)