

**North Carolina State University
Student Information System Implementation Project**

Project Charter

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**North Carolina State University
Student Information System Implementation Project**

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Revision History

Date Revised	By	Revision Description
10/31/05	B.Collings	Initial draft version

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REQUEST

North Carolina State University (NC State) is currently operating what is referred to as the Integrated Student Information System (ISIS) initially developed in 1988 by NC State and modified heavily to accommodate requests from various central offices. The core system is written in COBOL, IDMS and ADS/O and resides on an IBM mainframe. Access to the data in this system is also available through extracts loaded nightly to Sybase databases. Many inbound and outbound interfaces connect ISIS to numerous external systems, which are critical to the student administration process. Included in this request are the following objectives:

- Replace the existing ISIS with the Oracle Campus Solutions 8.9 product, renamed to Student Information System (SIS) for NC State use
- Move from a mainframe based architecture to an internet architecture
- Move from IDMS and Sybase databases to an Oracle database
- Utilize functionality within SIS to replace other external systems where possible either as part of the initial project or as an add-on project after implementation of the core product
- Provide a longer window of daily system availability.
- Significantly enhance and improve student administrative services currently delivered either through ISIS or external systems.
- Provide a platform for effective, cost-effective and timely delivery of further service improvements to faculty, staff and students

In March 2005, the NC State PeopleSoft Implementation Planning Task Force issued a report recommending implementation of the Oracle Campus Solutions 8.9 product and included an implementation strategy with a timeline and resource estimates. This plan calls for a phased implementation approach beginning with the implementation of the Admissions module in August 2006 and completing with implementation of the Advising module in September 2007. The Student Records, Student Financials and Financial Aid modules will be implemented in January through July 2007. This timeline was subsequently modified

HISTORY

- Early 1970's – first automated Integrated Student Information System using punch card input is implemented
- 1984 – Punch-card system replaced by a database system on an Intercom platform
- 1988 – Intercom system replaced by an IDMS database system
- 1988 through 2005 – IDMS system continually enhanced and modified to meet new requirements and changing technology using the Internet. Hundreds of interfaces are built and extracts created to service a large number of independent systems across colleges and campus
- 1998 – NC State purchases PeopleSoft HRSA 6.0 modules
- 2000 – NC State conducts Student Administration fit-gap and decides to stay on legacy system
- September 2004 – Implementation Planning Taskforce charged by Provost Oblinger to develop a plan for implementing Campus Solutions 8.9
- March 2005 – Draft plan delivered to Vice Chancellor and Provost for consideration in implementing Campus Solutions 8.9
- June 2005 – Vice Chancellor and Provost agree to fund the implementation of Campus Solutions 8.9
- June 2005 – A planning team is assembled to begin plans for the implementation
- July through September, 2005 – Project Leads are appointed and teams are formed to begin planning

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- October 2005 – Consultants are hired. Definition of Academic Structure and Campus Community begins, high-level fit-gap also begins.

SCOPE of EFFORT

NC State will implement Campus Solutions 8.90 applying all bundles issued and possible to apply prior to the Systems Test Phase. PeopleTools Release 8.46 is the initial Tools release and there is a possibility that the Tools will be upgraded to 8.47 during implementation. The project will be staffed using NC State employees with functional contract personnel assistance. This approach provides a maximum level of return for NC State. The Implementation Team documents, applies and tests the functionality including NC State customizations with the assistance of the Central Offices and Campus Implementation teams already familiar with NC State processes and policies thereby maintaining a high level of knowledge transfer. The enhanced knowledge transfer is essential to the continuing support of the applications and preparation for future upgrades.

In addition, the technical platform of the student applications will move from mainframe-based architecture to Internet architecture. The database technologies will migrate from IDMS and Sybase to Oracle and Sybase. There is an Administrative Portal in production currently for the Financials applications; however, a decision on whether or not to use the Portal for the SIS has not been finalized.

STRATEGIC OBJECTIVES

The following items have been identified as strategic objectives to be achieved with the successful implementation of this project:

- Continued high-quality customer service
- Improved quality of information integrity and accessibility
- Improved and more intuitive navigation and personalization of settings
- Increased customer satisfaction and productivity
- Reduced hardware requirements for campus since internet architecture will be utilized
- Improved integration of enterprise systems
- Incorporation of independent processes into the enterprise where applicable
- Improved (or maintained) processing efficiencies
- Improved accessibility from any location using a web browser, PDA or mobile unit
- Improved performance attained by moving to the Oracle Database platform
- Increased “self-service” functionality

It is advisable that NC State implement Campus Solutions 8.9 in order to accomplish the strategic objectives listed above. The implementation is advisable for the following additional reasons:

- There are many ease-of-use improvements introduced in the 8.9 Campus Solutions product. Some of these improvements are inherent in the Web architecture and others are included in the product.
- There are many functional improvements, some of which will be introduced at the point of implementation, and others that will follow after SIS is in production:
- Implementing Campus Solutions 8.9 puts student administrative applications on a supported platform meaning many modifications required for Federal reporting will be included in maintenance fixes received from the vendor.
- NC State has purchased a campus-wide license for the use of Oracle database software and pays annual maintenance fees for use of that software. Implementing a student information system that utilizes the Oracle database platform leverages the current investment.

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- As an integral part of the Campus Solutions 8.9 implementation, NC State will implement a state-of-the-art technical infrastructure incorporating a fully web-based technology.

CRITICAL SUCCESS FACTORS

The following items are identified as critical factors to achieving a successful implementation. In the event that any of these critical success factors are not met, the risk to the SIS project increases.

Funding and Resources

- Adequate resources (personnel and materials) must be committed to the project at all levels (i.e., Enrollment Management and Services (EMAS), Resource Management and Information Services (RMIS) Financial Services, the Graduate School,, other Central Office, etc.) in order for the project to be successful.
- Once resources are committed to the project at these levels, they must not be diverted to other competing demands unless such demands threaten the mission of the university.
- Consultants must be hired by November 1, 2005 and be effective in leading the functional teams.
- The project team must possess an appropriate mix of skills.
- Hardware environments must be available on time and have adequate speed and capacity for the intended work to be performed.

Project Sponsorship/Management

- NC State Senior Management must promote the project, remain involved in the project, and lend positive support to the project.
- Benefits to all stakeholders must be demonstrated and their active involvement must be sought in all phases of the project.
- An active environment of cooperation must be fostered between all organizations and departments impacted.
- Appropriate bodies must act upon necessary academic policy change requests quickly.

Training

- A robust technical and functional training plan must be implemented in a timely manner both during and following implementation.
- Central Offices, Campus and technical resources must be appropriately trained in a timely manner.

Communications

- A clear vision, strategy, statement of goals, deliverables, and project timetable must be well defined and frequently communicated throughout the organization.
- Two-way communication with stakeholders and senior management must occur on a regular basis.
- Coordination between the SIS 8.90 Implementation project and other related initiatives must be maintained.
- Clear and frequent communications to Campus must be included in the project communications plan.

Shared Vision

- Ownership must be shared across campus, EMAS, central office, RMIS and senior management staff.
- Long-term vision must be developed and communicated from the top down.

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CONSTRAINTS/ASSUMPTIONS

The new release of Oracle's Campus Solutions introduces many new features but some of these features will not be included in the initial SIS implementation to accommodate budget and time constraints. The primary concern of the project teams is to upgrade current functionality and assure that NC State is able to conduct business as usual on the new product.

Any business process changes requiring code changes during the upgrade project add to the level of complexity of the implementation in the areas of data conversion, training and support. Therefore, business and design issues will be resolved by consensus with a primary objective to maintain Campus Solutions 8.9 applications without code modifications. If there are new features that can be implemented with little or no impact to the project schedule, these features may be included in the implementation project.

The SIS Advisory Team, the SIS Steering Team, and the NC State Management Team must approve exceptions to this policy following scope change procedures.

The cut-off date for enhancements to the legacy Integrated Student Administration System was August 31, 2005. Any changes made after that date to the current production system must be legislative or critical to the University.

Enterprise Application and Database Services (EADS) will apply the bundles for Campus Solutions 8.9 during the project life cycle. Each time a bundle is applied, project progress will pause until the bundle has been tested and all retrofits re-applied.

Once System Test activities begin, we will no longer apply bundles. The complete bundle life cycle for the last set of bundles must be completed before the System Test activities begin. Exceptions to this constraint will be granted in the case of critical incidents. A critical incident is defined as a fix to core functionality that has been noted as a critical defect affecting an established business process.

Enterprise Technology Services and Support (ETSS) will build and test the required technical infrastructure prior to the beginning of the use of each environment. ETSS will test for end-to-end connectivity. In environments that are used by customers other than the Implementation Team, ETSS and EADS will conduct performance testing and tuning to assure acceptable systems performance prior to upgrade implementation. As required by Oracle, ETSS will certify the release 8 production environments.

EADS and ETSS personnel will efficiently coordinate application of patches and upgrades to PeopleTools across product lines and environments through the Configuration Management group.

It is assumed that Admissions, Financial Aid and Student Financials have a very limited population of users to train and therefore will not consume training resources to a great degree.

APPROACH

The project will include several implementation phases as well as add-on projects to be completed after the first 5 modules are implemented. The Admissions, Student Records, Student Financials, Financial Aid and Academic Advising modules will be implemented on a staggered schedule between August 2006 and September 2007. Because of this phased approach, the development teams will need to maintain two production environments from the period of August 2006 through September 2007 after which all processing will occur in the new SIS. Student Information Systems users will need to operate in both systems during this period of time also, depending on their business needs.

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While operating in two production environments, data conversion and interfaces will need to be operational on both production systems as data will need to be processed on both systems until the entire system has been converted. As modules are implemented, interfaces will need to be adjusted, and in many cases the flow of data from the interfaces will switch direction or will be dropped. Standard reports will be generated from the new SIS application as much as possible; however, the location of production data will dictate where reports will execute.

Consultants who are experts in OracleCampus Solutions version 8 Systems will lead Fit-Gap and Prototyping sessions with the Functional Teams providing expert information on the current production systems. Gaps will be documented; criticality, impact and benefits of changes (business process or application) identified and recommended solutions with alternate options will be delivered to the Advisory and Management Teams for approval. All decisions will be documented and the impact to the project schedule will be modified to include the work involved in implementing the solutions.

Technical Training will occur prior to development activities. Oracle technical classes for the most part will be conducted at a training center at NC State. Technical training will be completed prior to the completion of Prototyping. Functional Training will be conducted hands-on during the Fit-Gap and Prototyping sessions so limited Oracle training is anticipated for the functional participants.

Development will be phased, with Admissions and Records (partial) being the first implemented. A Housing module may be developed within PeopleTools but is not delivered by Oracle. Following Admissions, Financial Aid will be implemented in January 2007, Student Records in March 2007, Student Financials in June 2007 and Academic Advising in September 2007. In order to be implemented, a module must be programmed and tested, users must be trained and the infrastructure must undergo a performance test. Testing phases include Unit Test, Systems Test and Acceptance Test. Systems Testing and Acceptance Testing include testing of data converted from the legacy systems. Interfaces are tested throughout the development process, but must be ready for use in the Acceptance Test phase. Two production environments will be maintained during implementation: legacy production and SIS production.

Post-Implementation activities include implementation of changes requested during prototyping but not developed for the initial implementation. Also, maintenance fixes provided by Oracle during the project but not applied prior to Systems Test will be applied post-implementation.

RESPONSIBILITIES

Team and individual responsibilities are described below. During meetings or as a part of fulfilling daily upgrade project responsibilities, items requiring further research and analysis will be noted as 'open points' in meeting minutes or reported to the Project Manager. These open points will be tracked and closed as appropriate or converted to an 'issue' if resolution is not reached in a timely manner. An issue related to functionality of the SIS 8.90 product may be escalated to the point where a 'scope change request' is necessary. The scope change request requires approval of the Steering Team and the Management Team.

The **Student Information System Advisory Team** monitors the progress and success of the project in relation to strategic objectives. This team makes recommendations regarding the employment of resources and the setting and adjustment of project priorities. They will be responsible for reporting the overall status of the project to the Steering Team. Activities include, but are not limited to:

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- Monitor progress on SIS 8.90 Project tasks
- Act in the role of Risk Manager for the upgrade (see Risk Management Plan for specific activities and responsibilities)
- Participate in Steering Team meetings
- Participate in focus groups
- Assess change requests and determine authorization level required
- Provide timely and constructive review of project deliverables as required
- Allocate essential resources as identified and substantiated
- Provide strategic guidance as required

The Campus Solutions Implementation **Project Sponsor** monitors the progress and success of the project in relation to strategic objectives and serves as the project advocate to various groups on campus such as the Student, Housing, and Financials/HR Steering Teams, the Administrative Systems Management Team, the Research Council, and the Faculty Senate. The Project Sponsor provides guidance, direction and approval as needed to the various project teams and chairs the Campus Solutions Implementation Advisory Team. He will make tactical decisions regarding the deployment of resources and the setting/adjustment of project priorities. The Project Sponsor carries forward to senior management requests for resources and project status reports.

The Campus Solutions Implementation **Advisory Team** provides feedback regarding the overall status of the project and makes recommendations regarding the deployment of resources and the setting/adjustment of project priorities. This team is responsible for ensuring that system modifications are kept to a minimum and occur only when required. Activities include, but are not limited to:

- Monitoring progress on Campus Solutions 8.9 Implementation Project tasks
- Acting in the role of Risk Manager for the implementation (see Risk Management Plan for specific activities and responsibilities)
- Participating in Advisory Team meetings
- Participating in focus groups
- Assessing change requests and determining authorization level required
- Providing timely and constructive review of project deliverables as required
- Allocating essential resources as identified and substantiated
- Providing strategic guidance as required

The **Project Manager** has overall responsibility for the project. She will be responsible for monitoring the progress of various project activities and reporting the overall status of the project to the Project Sponsor and the Advisory Team. Activities include, but are not limited to:

- Providing communication link between project teams
- Approving project deadlines
- Issuing and updating project organization chart
- Assigning and distributing project responsibilities
- Tracking project expenditures
- Monitoring progress on project tasks
- Assessing risk level and communicating it to the Advisory Team as required
- Providing project status and information to Project Sponsor and at various meetings as requested by the Project Sponsor
- Preparing and recommending procurement requests
- Assessing change requests and determining authorization level required
- Reviewing all project deliverables and issuing papers
- Providing direction to Project Leads as needed
- Determining staffing levels and overseeing staff/contractor selection process

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- Providing effective resolution of issues that involve cross functional organizations or changes to business policies
- Communicating with external entities as needed
- Ensuring necessary training for Implementation Team members
- Providing regular status updates to Project Sponsor and Advisory Team
- Establishing Quality Assurance checkpoints and ensure reviews are planned and conducted
- Authorizing release of deliverables with approval from Steering Team
- Chairing weekly Project Management Meeting
- Presenting risk assessment and contingency plans to Project Sponsor and Advisory Team
- Enforcing and promoting project standards and procedures

The Campus Solutions Implementation **Functional Lead** oversees and coordinates major functional activities such as fit-gap and customer testing. She also performs project planning, monitoring and reporting functions as required. Activities include, but are not limited to:

- Coordinating Fit Gap and Customer Acceptance Testing efforts
- Establishing, promoting and enforcing project standards in functional activities
- Providing communication link between Functional Project Teams and Project Management
- Authorizing release of deliverables to Project Manager
- Participating in weekly Project Management Meeting
- Identifying change requests and working with Project Manager to determine authorization level required
- Identifying resources necessary for functional activities
- Participating in selection of contract resources as required
- Overseeing development of Functional Training Plan
- Managing the project schedule for the Project Functional Team
- Deciding when to escalate open point to an issue, with Project Manager input as needed
- Deciding when to escalate issue to scope change request, with Project Manager input as needed
- Providing regular status updates to Project Manager regarding functional activities
- Coordinating functional activities closely with Technical Lead as necessary

The Campus Solutions Implementation **Technical Lead** oversees and coordinates major technical activities such as system builds/configurations, application development, unit testing, system testing and load testing. He also performs project planning, monitoring, and reporting functions as required. Activities include, but are not limited to:

- Participating in Fit Gap effort as required
- Coordinating development, unit test, system test, and load test activities
- Establishing, promoting and enforcing project standards in technical activities
- Providing communication link between Technical Project Teams and Project Management
- Authorizing release of deliverables to Project Manager
- Participating in weekly Project Management Meeting
- Identify change requests and work with Project Manager to determine authorization level required
- Identifying resources necessary for technical activities
- Participating in selection of contract resources as required
- Overseeing development of Technical Training Plan
- Managing the project schedule for the Project Technical Team
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to scope change request, with Project Manager input as needed

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- Providing regular status updates to Project Manager regarding technical activities
- Coordinating technical activities closely with Functional Lead as necessary

The Campus Solutions Implementation **Infrastructure Lead** will be responsible for coordinating the creation and maintenance of technical environments required for successful completion of this project. She/He will provide tactical expertise and advice upon request. Activities include, but are not limited to:

- Executing, managing and/or tracking technical system implementation steps
- Assisting with technical fit gap analysis
- Establishing, enforcing and promoting technical project standards
- Providing communication link between Infrastructure Teams (e.g., DSS, DBA, Systems, Web Services) and other Project Implementation Teams
- Coordinating resources to support system tuning and trouble-shooting of technical environment issues
- Actively working with CM Lead to ensure consistency of direction and timing for all technical project deliverables
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting
- Identifying change requests and work with Project Manager to determine authorization level required
- Providing regular status updates to Project Manager

The Campus Solutions Implementation **Research and Development Lead** will be responsible for researching and resolving technical direction and impact issues. Activities include, but are not limited to:

- Assisting with technical fit gap analysis
- Identifying and researching technical areas that impact the implementation
- Discussing technical issues with Infrastructure Teams (e.g., DSS, DBA, Systems, Web Services) and reporting issues in weekly Project Management Meeting
- Providing communication link between Project Implementation Teams and Infrastructure Teams (e.g., DSS, DBA, Systems, Web Services)
- Actively working with Development Lead to ensure consistency of direction and timing for resolutions to technical issues
- Troubleshooting or assisting in troubleshooting implementation-related technical issues
- Coordinating with Oracle Customer Connection as required to facilitate resolution of technical or functional issues
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to scope change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting
- Providing regular status updates to Project Manager

The Campus Solutions Implementation **Development Lead** will be responsible for researching and resolving technical direction and impact issues. Activities include, but are not limited to:

- Participating in Fit Gap effort as required
- Providing communication link between Project Development Team and Infrastructure Teams (e.g., DSS, DBA, Systems, Web Services)
- Actively working with Research and Development Lead to ensure consistency of direction and timing for resolutions to technical issues

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- Discussing technical issues with all Development Team Managers/Supervisors
- Leading and coordinating the development effort
- Deciding when to escalate open point to an issue, with Project Manager input as needed
- Deciding when to escalate issue to scope change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting
- Providing regular status updates to Technical Lead and Project Manager
- Recommending and promoting project development standards

The Campus Solutions Implementation **Data Conversion Lead** will be responsible for researching and resolving technical direction and impact issues related to conversion of data from legacy student systems. Activities include, but are not limited to:

- Participating in Fit Gap effort as required
- Providing communication link between Project Conversion Team and the Development and Infrastructure Teams (e.g., DSS, DBA, Systems, Web Services)
- Actively working with Research and Development Lead and Development Lead to ensure consistency of direction and timing for resolutions to technical issues
- Discussing technical issues with all Development Team Managers/Supervisors
- Leading and coordinating the conversion effort
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to scope change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting
- Providing regular status updates to Technical Lead and Project Manager
- Recommending and promoting project standards

The Campus Solutions Implementation **Interface Lead** will be responsible for researching and resolving technical direction and impact issues related to interface requirements between the Campus Solutions application and other Campus applications and Campus reporting requirements. Activities include, but are not limited to:

- Participating in Fit Gap effort as required
- Providing communication link between Project Interface Team and the Development and Infrastructure Teams (e.g., DSS, DBA, Systems, Web Services)
- Actively working with Research and Development Lead and Development Lead to ensure consistency of direction and timing for resolutions to technical issues
- Discussing technical issues with all Development Team Managers/Supervisors
- Leading and coordinating the interface effort
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to scope change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting
- Providing regular status updates to Technical Lead and Project Manager
- Recommending and promoting project standards

The Campus Solutions Implementation **Client Lead** will be responsible for coordinating the requirements needed for the campus community to connect to/use the Campus Solutions modules. Activities include, but are not limited to:

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- Identifying the appropriate/supported client environment needed to use the CS modules such as web browsers, drivers, etc.
- Testing the appropriate/supported client environment with a pilot group to ensure conflicts/problems are minimized
- Publishing the appropriate/supported client environment along with any known caveats
- Providing communication link between Client Teams (e.g., College LAN Administrators/Help Desks, Central Help Desks – ETSS & ITD) and other Project Implementation Teams
- Assisting with the development of the training and FAQ's for campus users
- Leading and coordinating the client environment/access effort
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting

The Campus Solutions Implementation **Security Lead** will be responsible for coordinating the application security requirements needed for the campus community to access the Campus Solutions (CS) modules. Activities include, but are not limited to:

- Identifying needed security levels for various roles within the Campus Solutions modules
- Providing communication link between Security Teams (e.g., College LAN Administrators/Help Desks, Central Help Desks – ETSS & ITD) and other Project Implementation Teams
- Interface with Development Teams and Functional Teams in the creation and definition of security roles
- Interface with Application Security, Development and Functional Teams in the design of the new ASAP screen for requesting access to CS modules
- Interface with Application Security, Development and Functional Teams in the design of the new CS Security report
- Interface with Application Security and Functional teams in the design of the ASAP Security training program for campus
- Interface with Development Teams and Portal Lead in the security interface between the CS modules, the portal, human resources and financials
- Interface with Development and Infrastructure Teams during the pre go-live testing of individual's security access to CS modules
- Interface with Development, Functional and Reporting/Query Teams in the building of security query structure in the CS modules
- Provide leadership in the selection of authentication options
- Interface with Development, Infrastructure, Functional, and other leads in the design of the method to convert current individual security to the role based security in the CS modules
- Leading and coordinating the application security effort
- Deciding when to escalate open point to issue, with Project Manager input as needed
- Deciding when to escalate issue to change request, with Project Manager input as needed
- Participating in weekly Project Management Meeting

For each functional area, subject matter experts who represent the best business practices are designated as Sponsors. Activities assigned to these Teams include, but are not limited to:

- Answer questions of team members promptly and thoroughly
- Prepare for, attend and actively participate in analysis sessions
- Sign-off on functional area documents as requested
- Resolve issues as assigned

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- Develop/Refine test scenarios and cases
- Assist with test phases as required
- Develop and conduct campus training sessions
- Develop and deliver campus communication regarding upgrade

All Project Team members will be responsible for:

- Review of documents in a timely manner
- Research concerning topics of specific expertise as agreed upon
- Prompt revisions to the task list to reflect the responsibilities of their respective units
- Completion of assigned tasks in a timely matter
- Report status of assigned tasks in a timely matter
- Complete operational and training documentation
- Attend meetings as scheduled
- Document team meeting minutes and lead team meeting as assigned
- Record hours spent for all project assignments (hours per high level task)
- Read and provide necessary corrections to meeting minutes
- Communicate regularly with other team members and key sponsors
- Escalate issues or problems to management as needed
- Provide input on risks, issues and change requests as able

MANAGEMENT APPROACH

The Project Manager coordinates the activities of consultants, Functional Lead and the Technical Lead. The Functional Lead coordinates the activities of eight teams: Academic Structure, Admissions, Advising, Financial Aid, Student Financials, Records, Institutional Research and Reporting, and Auxiliary Services / Integration. The Technical Lead coordinates the activities of seven teams: Infrastructure, Research and Development, Development, Interfaces, Data Conversion, Client, and Security. Each Team is responsible for completing tasks as documented in the Project Plan.

PROJECT DELIVERABLES

Deliverables Description

PROJECT PLAN: The Project Manager, with assistance from the Cross-Functional Project Lead, Functional Lead and Technical Lead, will develop and maintain this plan as required throughout the project. It will include the following documents:

PROJECT CHARTER: This document identifies project scope, constraints and responsibilities.
COMMUNICATION MANAGEMENT PLAN: This document identifies how communication will be facilitated during the project.

QUALITY MANAGEMENT PLAN: This document identifies the quality requirements for the project and how those requirements will be maintained.

RISK ASSESSMENT: This document identifies risk factors for the project and how those factors will be mitigated.

TECHNICAL APPROACH: This document provides a high-level definition of the project development phases.

TEST APPROACH: This document defines the testing tasks and responsibilities for the project.

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TRAINING APPROACH: This document defines the training requirements and how they will be met for the project.

IMPLEMENTATION PLAN – This document contains a summary of the implementation process and a detailed, step-by-step task and schedule for pre-implementation, implementation and post-implementation activities. Pre-implementation phase includes the steps that customers will need to follow prior to implementation in order to prepare for the new system. Implementation phase includes data conversion, interface implementation, module implementation, hardware implementation and all coordination needed to complete the implementation. Post-implementation phase includes history data loads, system monitoring, help services, emergency plans and feedback forums.

PROJECT SCHEDULE: This document provides the detailed task list, resource assignments, duration and dependencies for the project. The Project Management Team maintains this document in Microsoft Project 2000 for tracking and monitoring project status.

ISSUES DATABASE: This Microsoft Excel spreadsheet identifies, tracks and reports issues and resolutions associated with the project. The project team will maintain this spreadsheet as issues and/or resolutions are identified.

FIT GAP ANALYSIS DATABASE: The Fit Gap Analysis Database is a series of Excel spreadsheets that document the results of the Fit Gap Analysis sessions. The Functional Teams will populate and maintain this database.

STATUS REPORTS: The Functional and Technical Leads will provide brief bi-weekly status reports to the Project Manager. Team members will supply brief weekly status reports on assigned tasks.

PROJECT FILES: The Functional and Technical Leads will maintain the project agendas, meeting notes, issues and action items for review by appropriate personnel at any time.

TEST TRACKING DATABASE: This Access database identifies all scenarios and test cases associated with a particular application module including information about priority, tracking and problems encountered. The Development Implementation Team revises these documents based on results of analysis sessions (Fit Gap and Impact).

TRAINING MATERIALS: The Training Focus Group will develop and/or revise training materials as required during the Project Life Cycle.

EXECUTIVE SUMMARIES: Project Manager, Functional and Technical Leads will consolidate the recommendations, analysis and products of the Project Team into Executive Summaries.

CONFIGURATION MANAGEMENT STANDARDS AND PROCEDURES: The Configuration Management Standards and Procedures document identifies the standards, procedures and tools currently used by NC State to control and maintain their environments. The Technical Team will revise these standards and procedures as required during the Project Life Cycle.

PRODUCTION ENVIRONMENTS:

- CS890PRD – Production, due 5/1/2006
- CS840RPT – Reporting, clone of production for query and reporting use, due 6/1/2006
- CS890TRN – Training, pre- and post- go-live, due 5/15/2006

DEVELOPMENT ENVIRONMENTS:

- CS890DMO – Demo, delivered 'vanilla' environment, due 9/8/2005

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- CS890DMX – Demo play area, ‘vanilla’ environment for limited exploration, due 9/22/2006
- CS890DMZ – Demo R&D, full-sized database, ‘vanilla’ environment for troubleshooting, testing, research, due 10/10/2005
- CS890CNV – Conversion, full-sized database used to develop and test data conversion scripts, due ???????
- CS890UPG – Upgrade, full-sized database, initially used as a development play area, also used for upgrades, due 11/15/2005
- CS890DV1 – Development, full-sized database for development modifications, data conversion, unit and integration testing, due 12/15/2005
- CS890SS1 – Systems testing area, full-sized database for performance tuning and troubleshooting, due 1/30/2006
- CS890QA – Quality Assurance, full-sized database for user testing, Systems Test, Acceptance Test, due 2/15/2006
- CS890LT – Load Testing, full-sized database for load testing, due 10/15/2006

Deliverables Management

- All approved or signed off deliverables will be captured electronically when possible. The approved version of the project plan deliverables will be maintained in the <\\ACSDEV1\DEV\Student Information System\Admin\Plans\SIS890 Implementation\> directory. Versions in progress will be maintained in the <\\ACSDEV1\DEV\Student Information Systems\Document\Package\FS84UPG\Plans\> directory.
- The Project Manager will maintain hard-copy deliverables in a common area for the project team.
- All completed project deliverables will be stored on the LAN in a shared environment.
- The shared repository will have read only access.

Deliverables Cross-Reference

DESCRIPTION	NAME	LOCATION
Project Charter	SIS 8.90 Implementation Project Charter	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\
Communication Management Plan	SIS 8.90 Implementation Communication Management Plan	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\
Quality Management Plan	SIS 8.90 Implementation Quality Management Plan	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\
Technical Approach	SIS 8.90 Implementation Technical Approach	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\
Test Approach	SIS 8.90 Implementation Test Approach	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\
Training Approach	SIS 8.90 Implementation Training Approach	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\
Risk Assessment	SIS 8.90 Implementation Risk Assessment	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation\

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Project Schedule	Student Information System 8.90 Implementation Project Schedule	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation
Implementation Plan	SIS 8.90 Implementation Plan	\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation
Upgrade Impact Analysis Database		
Issues Database		

All Project Team members will be given appropriate read and/or update access to the documentation paths shown above.

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ACCEPTANCE

Deliverables will be approved via written acceptance or e-mail. The following matrix identifies approval and acceptance requirements.

Document	NC State Management	Steering Team	Advisory Team	Project Manager	Functional Lead	Technical Lead	Functional Teams	Technical Teams	Project Mgmt Team	Sponsor	ETSS Managers	EADS Managers
Project Charter	A	A	R	D	D	D			A	R	R	R
Communication Mgmt Plan		A	R	D	D	D			A			
Quality Mgmt Plan	R	A	R	D	D	D			A			
Technical Approach	R	A	R	R	R	D		R	A	R	D	D
Test Approach	R	A	R	R	D	R	D		A	R	R	R
Training Plan	R	A	R	R	D	R	D		A	A		R
Risk Assessment	R	A	R	D	D	D	R	R	A			
Project Schedule	A	A	R	D	R	R	R	R	D	R	R	R
Implementation Plan	A	A	R	R	D	D	D	D	A		D	D
Fit Gap Executive Summary	R	A	R	R	D	R	D		A	R		R
Unit/Integration Test Executive Summary	R	R	A	R	R	D	R	R	A	R	R	D
QA Review Executive Summaries	R	R	A	R	R	R			A			R
System Test Executive Summary	R	A	R	R	R	D			A	R	R	D
Acceptance Test Executive Summary	A	A	R	R	D		D		A	R		R
Final Training Executive Summary	A	A	R	R	D		D		R	R		R
Performance Test Executive Summary	A	A	R	R	D	D	R	D	R	R	D	R
Scope Change Request	A	A	A	A	D	A	D		A	D		R

D = Develop, R = Review; A = Approve

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SCOPE CHANGE PROCEDURE

Requests for changes in scope will be submitted to the Project Manager for review and evaluation using the Scope Change Request form. Each request will contain estimated personnel and equipment requirements with associated costs required to effect the change. It will also identify in quantitative and/or qualitative terms the benefits expected. The groups identified in the Acceptance/Approval Matrix will approve scope Change Requests. The Scope Change Request template is located in the `\\ACSDEV1\DEV\RMIS\Templates` directory.

RISK ASSESSMENT

The risk assigned to this task is rated as **high** for the following reasons:

- **Size:** The impact of the changes will be felt across the enterprise. The Project Team must constantly strive to minimize any negative impact on the campus community as much as possible.
- **Technology:** The new release introduces a web-based infrastructure to the customer base. While web-based technology is not new to NC State, the use of it for these applications will present new challenges in performance and maintenance.
- **Staffing:** The project team is composed of members from several areas within the organization. These people are already fully tasked with high priority tasks and therefore, the positions these people fill must be backfilled. Special care must be taken to keep the right people dedicated to the tasks for the entire project.
- **Business Environment:** We are implementing a new application and tools in the midst of a fully scheduled calendar of regular student processing. Implementation of this project must be performed in a way that will not degrade system performance or customer satisfaction.
- **Organizational:** Definition of roles and responsibilities is currently changing within the support infrastructure. The roles and responsibilities of the various team members must be clearly defined to avoid any miscommunications as the formal definitions shift.
- **Quality:** Standards and Procedures are being refined and revised to reflect the new application and toolset. The project will be using and revising these standards as it progresses

For more details about the risk factors, please reference the Student Information System Risk Assessment located in the `\\ACSDEV1\DEV\Student Information System\admin\plans\SIS890 Implementation` directory.

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STUDENT INFORMATION SYSTEM LOCKDOWN AGREEMENT

The following is the lockdown agreement approved by the ISIS Steering Team in July 2005.

During the implementation of the Oracle Campus Solutions (CS) Application (formerly PeopleSoft Student Administration), it is critical that all resources available be directed as close to 100% as possible to the project. This will help to control costs associated with having to bring in outside technical consultants and assist in adhering to the project schedules. It is also critical that we be able to begin training a number of members of the fit-gap team, both functional and technical, in the functionality of the Campus Solutions applications in preparation for starting the fit gap analysis in September 2005. In order to accomplish this, it will be necessary to strictly control all requests for resources outside the CS project. Therefore, it is recommended that a lockdown on requests be placed immediately into effect and that resources only be directed to work not associated with the CS Project when:

- **The work is associated with problems or events that prevent customers of the applications from doing their work or that prevent the applications from working as designed**
- **The work is necessary to comply with University, State, or Federal regulations, procedures or requirements. State mandates may come from several entities including the Legislature or the Office of The President. The scope of this section may also encompass certain requirements resulting from audit findings or recommendations of a time-critical nature from State, Federal or University auditors, which, upon review, the University believes need to be addressed immediately.**

Problems and mandated changes will be dealt with in accordance with the ISIS Change Management process.

The lockdown shall be in effect from July 21, 2005 and shall remain in effect through completion of the Campus Solutions Implementation or until the ISIS Management Team lifts it. All requests submitted prior to July 21, 2005 that are approved by the ISIS Steering Committee will be completed.

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MILESTONES

PHASE	DESCRIPTION	FINISH DATES	DATABASE
Phase 1	Strategy and Planning		
	Academic Structure Campus Community High-Level Fit-Gap Initial Data Conversion Project Plan	12/2005	CS890DMX CS890DMO CS890UPG CS890CNV CS890DV1
	Approve Project Plan	01/2006	N/A
Phase 2	Structure		
	Prototype Sessions	04/2006	CS890UPG CS890DMO
	Issue Scope Executive Summary	05/2006	N/A
	Development Team Training	04/2006	N/A
	Issue QA Review/Risk Assessment Executive Summary	05/2006	N/A
Phase 3	Construct		
	Business Process testing and documentation	10/2006	CS890DV1 CS890QA CS890FAA CS890REC
	Admissions Construction – development, interfaces, final data conversion, unit test, executive summary and risk review	05/2006	CS890DV1 CS890QA CS890CNV
	Housing Construction – development, interfaces, final data conversion, unit test, executive summary and risk review	05/2006	CS890DV1 CS890QA CS890CNV
	Initial Records Construction – development, interfaces, final data conversion, unit test	05/2006	CS890DV1 CS890QA CS890CNV
	Financial Aid Construction – development, interfaces, final data conversion, unit test, executive summary and risk review	09/2006	CS890DV1 CS890QA CS890CNV
	Final Records Construction – development, interfaces, final data conversion, unit test, executive summary and risk review	10/2006	CS890DV1 CS890QA CS890CNV
	Student Financials Construction – development, interfaces, final data conversion, unit test, executive summary and risk review	03/2007	CS890DV1 CS890QA CS890CNV
	Advising Construction – development, interfaces, final data conversion, unit test, executive summary and risk review	04/2007	CS890DV1 CS890QA CS890CNV
	Issue Final Unit/Integration Test Executive Summary	07/2007	N/A

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PHASE	DESCRIPTION	FINISH DATES	DATABASE
	Issue Final QA Review/Risk Assessment Executive Summary	07/2007	N/A
Phase 4	Transition		
	Admissions Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	07/2006	CS890QA CS890PRD CS890RPT CS890TRN
	Housing Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	07/2006	CS890QA CS890PRD CS890RPT CS890TRN
	Initial Records Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	07/2006	CS890QA CS890PRD CS890RPT CS890TRN
	Dual production planning and set-up for legacy and SIS	07/2006	Legacy + SIS environments
	Financial Aid Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	12/2006	CS890QA CS890PRD CS890RPT CS890TRN
	Dual production planning and set-up for legacy and SIS	12/2006	Legacy + SIS environments
	Final Records Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	02/2007	CS890QA CS890PRD CS890RPT CS890TRN
	Dual production planning and set-up for legacy and SIS	02/2007	Legacy + SIS environments
	Student Financials Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	05/2007	CS890QA CS890PRD CS890RPT CS890TRN
	Dual production planning and set-up for legacy and SIS	05/2007	Legacy + SIS environments
	Advising Transition - System Testing, executive summary, Acceptance Test, executive summary, Performance Test, executive summary, Customer Training	08/2007	CS890QA CS890PRD CS890RPT CS890TRN
	Dual production planning and set-up for legacy and SIS	08/2007	Legacy + SIS environments
	Issue Final Training Executive Summary	08/2007	N/A
	Issue Performance Test Executive Summary	08/2007	N/A

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PHASE	DESCRIPTION	FINISH DATES	DATABASE
Phase 5	Deploy		
	Admissions Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	08/2006	CS890PRD CS890RPT
	Housing Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	08/2006	CS890PRD CS890RPT
	Initial Records Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	08/2006	CS890PRD CS890RPT
	Dual production plans executed, production systems go-live, follow-up	08/2006	Legacy + SIS environments
	Financial Aid Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	01/2007	CS890PRD CS890RPT
	Dual production plans executed, production systems go-live, follow-up	01/2007	Legacy + SIS environments
	Final Records Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	03/2007	CS890PRD CS890RPT
	Dual production plans executed, production systems go-live, follow-up	03/2007	Legacy + SIS environments
	Student Financials Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	06/2007	CS890PRD CS890RPT
	Dual production plans executed, production systems go-live, follow-up	06/2007	Legacy + SIS environments
	Advising Deployment – code moved, data converted, security set, plan drafted and rehearsed, new cross-production interfaces in place, legacy system adjusted as needed	09/2007	CS890PRD CS890RPT
	Dual production plans executed, production systems go-live, follow-up	09/2007	Legacy + SIS environments

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PHASE	DESCRIPTION	FINISH DATES	DATABASE
Phase 6	Post-Production Clean-up and Upgrades		
	Post-Production Clean-up and Upgrades	07/2008	

OPEN POINTS

1. A more complete description, including templates, should be identified for scope change.
Review Scope Change Request template (2/5/03)
2. The level of coordination and testing with HR must be identified.