uAchieve Implementation: TADA Project Charter

Version: 1.3

Date: 02/02/18

Prepared by: Santiago Fernandez-Gimenez & Project Steering Team

University of Minnesota| Academic Student Resources

106 Pleasant St SE | Minneapolis, MN 55455

Executive Project Background/Justification

*College Source provides the University of Minnesota with a product, DARcS / DARwin, that meets two central business needs: **Degree Audit** and **Transfer Articulation**. The University has used DARS since 1988, and now that product has reached end of life. After an analysis of alternative products in the marketplace the decision has been made to move forward to implement uAchieve, the most current College Source product in support of these two functions. From a technical perspective this upgrade is essential. The vendor will no longer support our old version of DARS / DARwin.*

Our current interface between PeopleSoft and DARS / DARwin is heavily customized, mainly to support our multiple institution, single transcript model in PeopleSoft. Since it is unlikely we can modify our core organizational model and supporting business practices, we must analyze a very old, complex, and expensive customization and determine exactly what we need to rebuild.

In addition to upgrading the software and modernizing, retrofitting, or rebuilding integrations, this project provides the opportunity to improve our service to students and support the strategic goal of increasing our graduation rates. These opportunities include:

- *Improve data integrity and consistency of business processes in order to generate more accurate and standard academic statistics.*
- *Bring sufficiently detailed information about transfer courses into PeopleSoft so that transfer students can register for classes with co- or prerequisite requirements based on their transfer course completion, and repeat course rules can be effectively enforced.*
- *Ensure that the different types of incoming credit (transfer, test, & other) are handled discreetly and appropriately.*
- *Implement and utilize standard "progress to degree" encoding. Use the metrics-based Student Degree Progress (SDP) analytical framework to identify bottlenecks, improve practices, and help at-risk students.*
- *Implement a sustainable and seamless system security model that allows staff to gain access to appropriate functionality quickly.*

Project leaders were asked what project success looks like in five years; they see this project as foundational in terms of data accuracy and transparency, service quality and efficiency, and as a basis for innovation in areas such as academic planning and analytics. The upgrade and the defined process improvements are important and beneficial, and their value will be multiplied over time.

Project Objectives, Measures of Success and Benefits

Project Objective	Measure of Success	Benefits
OBJ-1: Implement the system in a way that supports our Multi-Institution business model.	Each campus can articulate transfer credits and perform accurate degree audits independent of each other.	Continue to operate with our current balance between centralization and autonomy. Minimal impact to the many other business processes that are already designed with our current structure.
OBJ-2a: Upgrade Degree Audit functionality from DARS /DARwin to uAchieve	Increased satisfaction and confidence in Degree Audit functionality. New features / opportunities in the product are evaluated and implemented as appropriate.	More stable, modern system that can be maintained and secured. Improve user experience for Students and Staff.
OBJ-2b: Implement Self-Service Degree Audit, including advisor interface for exceptions.	Advisor satisfaction and confidence.	Improve user experience for Students and Staff. Reduced number of inappropriate or mistaken exceptions
OBJ-2c: Deliver Degree Audit (APAS) services that meet or exceed their current service level.	Stakeholder satisfaction, including Athletics, Admissions, Registrars (MNTC, Veteran, Transfer) Colleges (orientation) Student satisfaction with degree audit	The upgrade does not lead to negative service impacts. Student degree progress degree audit information remains available to TC/RO students from the MyU degree progress tab. UMM, UMD, UMC will have SDP service added as PTD encoding is completed- ready for display on MyU. Students receive their degree audit information in the context of their other University business.
OBJ-2d: Student Data Loader implementation is not a direct update of STUINST. Align integration to our processes, policies, and upgraded software.	Data are available based on defined requirements.	Improved service, improved innovation / integration framework.
OBJ -3a: Implement delivered Batch Audit tool. Retire or reduce use of custom batch audit functionality.	Batch audits are configured and run successfully at peak times (for orientation, 1st day of classes, etc.)	Reduce complexity of customization Increase reliability with vendor supported functionality
OBJ -3b: Implement a Data Warehouse (or similar) for uAchieve degree audit data to provide fresh, accurate data for	Timeliness of data available for other systems and reports. Degree of data availability	Data is well structured and documented. Data is available to SDP, Grad Planner, APLUS, and other tertiary systems at near real-time.

Student Degree Progress and other applications, custom reporting, and analytics uses.	and ease of use. System availability and responsiveness.	Support for sophisticated analytics is part of an enterprise delivered service Load on uAchieve servers can be managed to ensure availability and responsiveness. APLUS, UMD, OIR, and Admissions data extracts from DWDW are still available in existing or replacement form
OBJ -3c: Continue Student Degree Progress service without interruption. Expand the service to additional programs and campuses by adding or updating majors and/or minors/certificates to "Progress to Degree" encoding.	Number of programs where PCAS meets best practice in prep for SDP encoding. Number of programs where SDP derived facts are available.	Ability to provide more targeted service to students in their final year. Ability to identify and anticipate program bottlenecks. Foundational work for more innovative data analytics over time.
OBJ -4: Implement uAchieve dashboard to manage security. Explore moving responsibility for assigning, deprovisioning and troubleshooting access to the Degree Audit (APAS) team. Explore use of OIM integration.	Number of users provisioned correctly.	Troubleshooting will be more timely. De-provisioning will be part of the process design. OIT provisioning team will no longer need to manage this. UIS 3rd party vendor security audit completed and mitigated
OBJ -5a: Upgrade Transfer Articulation functionality from DARwin to uAchieve	Current Transfer Articulation rules work with legacy Backbridge. New features / opportunities in the product are evaluated and implemented as appropriate. Prepared for iterative development of Backbridge.	After Phase 1 Transfer Articulation functionality continues as is, uninterrupted. Admissions operational report functionality is available. New functionality is implemented as available.
OBJ -5b: Re-think, refactor and replace outdated Backbridge	Code is no longer in COBOL. PS customizations are reduced or refactored. Reduced time spent validating transfer course data.	Upgraded code base is easier to maintain / hire for. Reimagined business process may allow for technical simplification. Processes are easier to maintain, troubleshoot, and validate.
OBJ -5c: Implement transfer bridge (or similar) functionality to display sufficiently detailed information about transfer courses, grades, and credits in PeopleSoft.	Individual transfer course information is brought in to PeopleSoft.	Prerequisite checking in PeopleSoft works with transfer courses. Incorporate transfer credit into repeat-checking to support accurate academic statistics (last attempt counts).

OBJ -5d: Implement Transfer Bridge (or similar) functionality to ensure different forms of credit are cataloged separately in PS: student enrollment activity, course ("transfer") credit, test credit, and other credit.	Incoming credit posted as Transfer course Test Other credit	Follow AACRAO best practices.
OBJ -5e: Improve data availability and reportings to support quality assurance	Reduced time spent on manual data validation.	Any and all integration errors are easy to recognize, catch, report, and troubleshoot. Support and maintain confidence that articulated test, transfer, and other credit information in PeopleSoft is accurate.

Scope
In Scope
The following items are considered in scope for this project:
- Upgrade and implement all of the purchased uAchieve upgrade components as defined in the statement of Work with College Source.
- College Source Services will customize Student Data Loader to meet UMN specifications.
  - Include cohorting data points that impact degree audits.
  - Include data points that aid in SDP and institutional analysis
- Degree Audit student interface
  - Implement and design uAchieve Self-Service interface to improve student user experience
  - Display student degree progress information in MyU (as currently with TC/RO)
- The Backbridge is the UMN custom integration from DARS to PeopleSoft. UMN will rewrite, redesign, or retain functionality that is currently in our "Backbridge" integration that deals with:
  - Our Multi-Institutional set-up in PeopleSoft.
  - Legacy, pre-semester-conversion credits.
  - Legacy pre-PeopleSoft credits.
  - Integrating currently articulated credits
  - The ability to update and edit transfer articulation
- New transfer credit functionality:
  - Transfer course credit, test credit, other credit shall be treated distinctly, per AACRAO best practices
  - Design and implementation of data transfer of sufficiently detailed, articulated transfer course information in order to have pre- and co- requisite rules in PeopleSoft work well for transfer students.
    - Investigate all existing PS options, including Catalog, subject areas, equivalencies, posting vs importing courses.
    - PS customization is possible, but not our first choice.
    - Adjust an existing business process (if necessary) in order to make Transfer Details work.
- Data, analytics, and integrations:
  - Use progress to degree encoding across the institution.
  - Enable enterprise level longitudinal and strategic analysis of uAchieve data via Student Degree Progress service.

- UMN will develop a data archiving best practice to implement real time degree audit storage.
- Retain operational data (currently DWDW) used by Admissions to prioritize transfer credit evaluation
- Develop and implement a strategy to deal with Legacy System transfer course data.
- Retrofit integration to Graduation Planner to avoid any loss in functionality, however enhancements are out of scope.

Out of Scope

The following items are considered out of scope for this project:

- Custom Degree Audit styles per campus.
- Customization of College Source delivered code - unless otherwise noted.
- Change management and offering service related to the "SDP Service".
- Custom reports of UAchieve data outside of SDP and delivered Reporting Center
- Building of Pre- or Co-requisite rules in PS
- Changes to existing Enrollment Requirement Groups in PeopleSoft
- Support for transfer totals for MN State Grant credit calculations
- Implementing custom repeat checking in PS
- Purchase or implementation of new uAchieve Planner
- Retirement of Grad Planner / Schedule Builder
- Enhancement of Grad Planner / Schedule Builder
- Enhancements to ECAS / PCAS

Dynamic scoping and prioritization

Business needs have been expressed that are not at the core of the project, but may offer real business value, so we don't want to explicitly scope them out. We do not currently know all of the features of the latest version of uAchieve software, so there may be opportunities that arise. The nature of this project includes some exploratory components. We may well discover opportunities as during implementation of uAchieve, during the rewrite of the Backbridge, or during the Progress to Degree encoding that lead us to identify high value work that could be completed within the context of the project.

We want to leave the space to react to opportunities over time. By using a dynamic prioritization process with a defined scoring rubric, we can take advantage of what we learn during the project to maximize our investment. The prioritization process will be advisory in nature.

- All participants are welcome to voice support or concern and provide context for prioritization efforts. The team will seek consensus on prioritization.
- The voting participants on the project steering team will provide documented prioritization input.
- In case of any conflicts over prioritization, decision-making will flow through the project governance structure.

Budget Estimate

Project Budget Requirement	Source
Vendor Services cost	*Statement of Work*
FTE Resources	*See Spreadsheet*
Software	*Vendor Software Cost*

Dependencies (D) /Assumptions (A)

The following are internal and external factors that could impact the success of the project (positively or negatively):

Phase 1

- *A: 12 months of College Source services work for technical upgrade.*
- *A: uAchieve will be used by all campuses*
- *A: We will have one version of the Self Service interface that is shared by all 5 campuses.*
- *A: Backbridge, Grad Planner, and SDP can be retrofit to integrate with uAchieve.*
- *D: Catalog Years and curriculum changes may be a complicating factor. May need to delay the implementation of some curriculum changes during the project.*
- *D: Phase 1 launch must fit within our academic calendar. Aiming for July 2019. Fall back dates will need to be identified.*
- *D: UMN OIT will provide hardware, virtual servers, database administration, and web hosting for all components of the upgraded uAchieve system for all campuses. There is no cost worked into the budget for hardware or software associated with this service.*

Phase 2

- *A: PeopleSoft can include credits from course, test, and other credits in the performance of pre- and co-requisite checking.*
- *A: uAchieve will remain the "source of truth" for transfer courses.*
- *A: Backbridge functionality can be rewritten or replaced and meet business needs*
- *A: Students articulated with "Legacy Data" need accurate output.*
- *A: UMN will be able to use Bootstrap Theme to improve the usability of the Degree Audit.*
- *D: ECAS has a limitation regarding how it handles course offering nbr. This may limit our design options for transfer details in PS*
- *D: University data warehousing strategy implementation may impact how we can deliver archived degree audit data, and how we retrofit or replace DWDW.*
- *D: Academic departments and disciplines will have to work with curriculum specialists on Progress to Degree (for entry in PCAS, then, eventually, uAchieve.)*

Risks and Issues

All team members are expected to identify and report risks and issues to the Project Lead/Manager who, with the project team, will assign an owner to them.
RAID Log

Project Timeline and Milestones

Below is a list of key events, accomplishments and key dates within the project. Coming Soon!

Milestone	Date
Phase I: College Source Engagement kickoff	July 2018 (Subject to College Source project plan)
College Source delivers technical upgrade and uAchieve Self Service for testing	April 2019 (Subject to College Source project plan)
Retrofit Integrations complete	May 2019
Phase I testing and bug fixes complete, uAchieve launched	July 2019 (Subject to College Source project plan)
Phase II initiated : Backbridge approach finalized	August 2019
Graduation Planner Next steps determined, funding secured	January 2020
Data Archive, Transfer Detail, and integrations ready for end to end testing	May 2020
Phase II testing complete- Backbridge replacement live	July 2020
Project closure	August 2020

Project Team Roles and Responsibilities

Project Stakeholders and Governance Document

Project Team Roles and Responsibilities (TBD as working team is assembled)

Project Stakeholders

Stakeholder Analysis Spreadsheet

Signatures

The below signatures indicate key project stakeholders have had an opportunity to review and provide input to the Project Definition document and are in agreement with its contents.

Name/Title	Signature	Date
Executive Sponsor Susan Van Voorhis		

Business Owners
    Stacey Tidball
 	
    Adrienne Bricker
	Stacey Tidball
	
	Adrienne Bricker
		03/15/2018
		
		03/14/2018

IT Owners
    David Imdieke
 	
    Grant Clavelle
	David Imdieke
	
	Grant Clavelle
		4/13/2018
		
		3/15/18

George Hudachek	George Hudachek	3/21/2018

System Campus Registrars:
    Carla Boyd
 	
    Judy Korn
 	
    Ken Myers
	Carla L Boyd
	
	Judy R. Korn
	
	Ken W. Myers
		
		3/14/18

Project Manager Santiago Fernandez-Gimenez	Santiago Fernandez-Gimenez	3/20/18

Document Version Control

Version	Primary Author	Description of Change(s)	Date
1.0		Created document	9/10/2017
1.22	Santiago FG	Updated document per data collected	01/17/18
1.3	Santiago FG	Added Dynamic scoring section	02/02/18
1.4	Santiago FG	Incorporating sponsor feedback	02/16/18
1.5	Santiago FG	Finalized for "signatures"	03/14/18