L35 Lincoln University

Transition from SunGard Management and Colleague Self Sufficiency – Basic Project Plan

Eric Watson, Datatel, 5/11/2009

Introduction.

This document is based upon 2 weeks of on-site interviews during the weeks of 4/27/09 and 5/4/09 by Eric Watson with approximately 30 Lincoln University end-user offices. During the interviews Eric did a basic assessment of Colleague as it is deployed at Lincoln and identified areas of concern, especially focusing on identifying support functions currently performed by SunGard. This document is a "shell" project plan for Lincoln to use as the basis of transitioning from SunGard to Lincoln support of the Colleague system (with Datatel assistance). As per conversations with Ruth Campbell and Leon Stevens, upon review and approval of this plan by Ruth and the University's president, Dr. Mahoney, the plan will be turned over to Dr. Stevens for expansion and execution. Eric Watson and Datatel expect to assist Dr. Stevens and Lincoln University with ongoing planning and execution.

If Lincoln would like Datatel to put more information or detail into this document or would prefer a different format, Eric Watson would be happy to do so.

Project Goals

Lincoln University wants control of the maintenance and extraction of the data stored in the Colleague ERP system without reliance on a 3rd party vendor. To that end Lincoln is terminating its relationship with SunGard and has asked Datatel for assistance with the transition to Lincoln management of the system. In the short term (summer 2009) Lincoln will take over those day to day operations functions as performed by the SunGard staff, in the long run Lincoln would like to more effectively use Colleague as a true ERP.

Formal support by SunGard for management of Datatel ends after 6/30/09; however, SunGard will continue to maintain the server hardware and o/s (as well as the network and Help Desk).

Lincoln would like to deploy any parts of the system licensed but not in use as appropriate.

Main areas of concern/areas to address

1. *Reporting*. Every end-user interview indicated that reporting/data extraction is extremely problematic. Lincoln relies on "Impromptu" (based on Safari and UniData SQL-ized views of UniData files and using Cognos as the front end), Query Builder, and the "L35 Reports", which appear to be a mixture of Envision and colon prompt reports. In some cases the reports do not deliver what is needed, in other cases reports are available but the end users either don't know about them or do not have access. In a number of cases the data in the Impromptu "hot files" is correct but users either don't understand the data or the wrong field is being pulled from Colleague.

2. *Data integrity*. There is a serious problem with institutions, transfer credits and equates, and transcripts that must be addressed in the short run. End users are maintaining separate systems such as local student addresses and financial data. There are also some data issues in the area of HR but these are not as critical.
3. *End-user training*. The user community is very poorly trained in use of the system. Lincoln will need Datatel training of end users combined with mentoring of users in creation and maintenance of operational procedures and cheat sheets.
4. *Data flow/stewardship*. The data flow and steward ship picture is very murky and it's not clear who owns a given record at a given point. End user security and access to forms and data is problematic and inconsistent. Defining ownership of data, data entry standards, and granting access to data is a high priority. This will be especially complex as we consider the advising/at risk data flow from Admissions Connect system to Colleague to Angel
5. *Analyst function*. Improvements are needed in the analysis of various operations and the implementation of short and long-term solutions that maximize use of the software and take into account the overall needs of the University. Lincoln must develop the capacity to do this themselves. To that end, user offices will need a better understanding of the system and the process in which the LUTC oversees the operation must be clearly understood and documented.
6. *Advising/at risk*. Due to the nature of the institution, advising of students and working with high risk students is a high priority. This function touches many offices/areas and there are gaps in the process and in the software. Advising must be given a holistic overview and upgrade.

Project Organization

Project Sponsors: Dr. Mahoney and Ruth Campbell

Project Lead: Dr. Leon Stevens (with Eric Watson, Datatel)

Organize the project into the following teams. Hold weekly project meetings chaired by Dr. Stevens with a representative from each team. Each team to select its own chair and meet weekly, with regular reports to Dr. Stevens. Meeting frequency can be scaled back once the project is well underway, perhaps going to monthly in the fall. Dr. Stevens will maintain the overall project plan and monitor the timeline.

The staff associated with the teams are listed as a starting point for planning purposes.

Project Technical Team: Dr. Stevens, Gurrinder Batth, Heather Peterson, Ron Kidwell

Reporting Team: Heather Peterson

Financials Team (include Student Accounts): Kevin Ihetu, lead, Gina Roessner

Student System Team (Records, Financial Aid, Admissions, Student Accounts): Andrea Hendricks, Cynthia Hawk, Mike Kosher, Kathy Pabst.

Core Demographics Team: Cindy Jones, Steven Beal

Advising/at risk team: ==Paula Clay, Stacy Phillips, Talisa Walker==

Communication Plan

1. Project charter and plan on shared network drive, 5/2009.
2. Project Web site and e-mail to community, May or June, 2009.
3. Reconvened User's Group under Dr. Stevens – commence meetings summer 2009.
4. Communication from project team to project leaders then to project sponsors.

Project Budget

1. Datatel consulting. Initial transition assistance SOW already signed.
2. Datatel custom programming.
3. New software. ODS Data Orchestrator. Quote provided to Lincoln.
4. New hardware. A server with Microsoft SQL server to hold reporting data generated by the Data Orchestrator.

New Colleague/ERP Support Structure

Lincoln University is forming a new "ERP Systems Support" (ERP SS) group headed by Dr. Leon Stevens. Dr. Stevens has two responsibilities: primary Colleague Administrator and more importantly, will be the lead on this project and will become the analyst for Colleague operations as well as serve as the primary contact with the Lincoln University Technology Committee (LUTC). Staff in ERP SS will include Gurrinder Batth (programmer/analyst) . Dr. Stevens and Gurrinder do not have any experience with Colleague,

Project Plan

1. Immediate (May/June 2009)
    a. Complete and agree upon project goals, plan and timeline (Datatel and Lincoln University).
    b. Turnover the plan to Dr. Stevens for execution with advice and input from Eric Watson. Detailed project planning by Dr. Stevens (Eric Watson and Dr. Stevens).
    c. Publicize the plan to the Lincoln community (Lincoln).
    d. Formation of the project teams (identify the members, leaders and give them notice as to what to expect) (Lincoln).
    e. Basic Colleague Administration for ERP SS (Datatel and ERP SS staff). Basic Colleague Administration training for ERP SS staff is scheduled during Eric Watson return visit in early June, 2009.
    f. Additional technical training for ERP SS staff summer 2009. See the ERP SS training document sent to Ruth Campbell 5/11/09 (Datatel and ERP SS).
    g. GL training/consulting for new Controller's Office staff (Datatel and Controller's Office staff). Focus on basic AP/GL functions, closing and opening fiscal year.
    h. Compile operational calendar with corresponding processes (Lincoln end users, ERP SS, Datatel and SunGard). This includes data flow to and from external systems including

Blackboard Commerce, Library (Innopack), Angel, Admissions (Hobsons Connect), the bookstore, NCAA.

i. Define support structure – opening and handling support requests and requests for new functionality (Lincoln and Datatel)

j. Creation of a basic Colleague terminology and definition guide – on the Web site perhaps. What is Colleague? What is UI? What is WebAdvisor? What is UI Web? What is Angel? What's happening to Blackboard? (Datatel and ERP SS).

k. Confirm Datatel training and consulting schedule (Datatel and Lincoln).

l. New user account creation process. ERP SS should work with James Raum on account creation (Unix and OPERS). Do this after basic Colleague Administration training by Eric Watson (ERPP SS and James Raum).

m. User account deletion process (ERPP SS and James Raum).

n. Reporting inventory (will continue into the summer). Document inventory of existing reports by office (Envision, UniBasic/UniQuery, Query Builder, Impromptu/Cognos) .

o. System-wide user password change (ERP SS).

p. Approval override password change (Datatel and ERP SS).

q. Reevaluate Datatel Retention Alert for at risk management (Lincoln and ERP SS).

r. Formation of project teams (reporting, financials, student records, advising, etc.) (Lincoln).

2. Short Term (summer 2009)

a. Replace SunGard operations with ERP SS with Datatel support (Datatel, SunGard and Lincoln). James Raum and Cathy Burnett to do normal work with ERP SS staff shadowing and documenting every process (ERP SS).

b. ERP SS staff training (Datatel, Dr. Stevens, Gurrinder, Heather and Ron).

c. Reconvene Datatel User's Group under Dr. Stevens. Identify power users in each office/area (Dr. Stevens).

d. Create end-user training plan (Datatel with Lincoln). Departmental and support staff. Initial list for base application training is Academic Records for Records Office (Andrea Hendricks), Accounts Receivable (Cynthia Hawk), and base AP and GL training for new Controller's Office staff.

e. Inventory of existing custom (SunGard).

f. Address transfer credit/equate/transcript issue (Datatel, Records Office, Admissions). Also consider issue of missing minors awarded 1985-2003.

g. Program accounting/payroll issue, program accounting and the link with design/construction (Datatel, Program Accounting, Design & Construction, Controller's Office). Consider the necessary custom programming (by Datatel) to complete the link between payroll and program accounting.

h. Lincoln review of purchasing process – standard process for end users, cheat sheet/codes and training (Lincoln).

i. ODS (Datatel and Lincoln) (initial installation and testing).

j. E-checks (SunGard and Lincoln).

k. Performance – tune prior to fall semester (Eric Watson and ERP SS).

l. Bookstore/Datatel voucher issue – resolve before fall term. 2 problems: what happens when a voucher is created using an inappropriate scholarship; some transfers to bookstores result in a negative balance in the bookstore system (James Howard, Student Accounts, Datatel).

m. Fix health restriction blocking registration for Ft. Leonard Wood students. (ERP SS and Datatel).

n. Advising enhancements – need to be able to record comments. Evaluate the whole at risk cycle: Admissions -> Colleague -> Angel. Consider Public Safety and Student Activities. (Lincoln and Datatel).

o. EDX review of Admissions imports from Connect into Colleague. (Datatel, ERP SS and Admissions). Add additional fields such as ACT scores.

p. Staff access to http://clients.datatel.com (manuals and community forums) (Lincoln).

q. Enable on line help (Eric Watson and ERP SS).

r. Continue reporting inventory and develop list of new reports needed in ODS/SQL/Crystal/Envision. Lincoln to tackle simpler ODS/Crystal reports, Datatel to handle more complex Crystal or Envision reports (.

s. Commence Datatel system maintenance (software updates) (Eric Watson).

t. Increase WebAdvisor timeout (Eric Watson and ERP SS).

u. User office testing plans for testing impact of software updates (ERP SS to lead).

v. Evaluate Instant Enrollment (ERP SS and Continuing Education).

w. Query Builder security review (ERP SS).

3. Long term (Fall 2009 through 2010)

a. Deploy new User Interface (based on UI Web) (ERP SS, fall 2009)

b. Development of reporting plan (list of reports and method to produce) .

c. Evaluate Admissions and use of Connect, look at moving Admissions operations back into Colleague (ERP SS and Admissions, fall 2009).

d. FERPA review (Academic Records and ERP SS, fall 2009).

e. CORE demographics review. Data entry standards documentation. Student address maintenance procedures (fall 09). Clean up existing demographic data (through 2010).

f. Activities and Events for Student Activities and Continuing Education (winter 2009) (Datatel, Lincoln).

g. Address need to preserve comment history in requisitions (Debra Kidwell, ERP SS and Datatel (fall 2009).

h. Security class/user access review, include Query Builder security (ERP SS and Lincoln, fall 2009).

i. HR review and on site consulting. Implement Web Advisor staff self service. Paperless HR work flow in conjunction with Hershey (Datatel and HR, fall 2009).

j. Evaluate Career Office packages (Simplicity and Experience). Requires data feed from Colleague (ERP SS and Career Counseling Office, fall 2009).

k. CORE review: data entry standards and procedures (fall 2009); existing data cleanup (spring 2010) (Lincoln).

l. Mail merges directly from Colleague/enhanced Communications Management (Datatel and Lincoln) (ERP SS, 2009 through 2010).

m. Re-enable Degree Audit (contingent upon resolution of transfer/equates issue) (Lincoln, spring 2010).

n. Implement Instant Enrollment (spring 2010).

o. WebAdvisor enhancements (Records, ERP SS, 2010)
    i. Graduation application including payment
    ii. Students to maintain local and permanent address and choose preferred address

p. Building/space features into Colleague (Lincoln, 2010).