

Project Charter for
PeopleSoft Student Administration System Project



Project Charter

PeopleSoft Student Administration Project

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Executive Summary

The Student Administration Pre-Assessment Team, following 8 months of work to meet its charge, has provided introductory PeopleSoft training courses in preparation for analysis sessions where 60 stakeholders could assess the Student Administration System; resolved strategic business decisions; and developed the project budget projections and implementation roadmap. This project charter culminates the pre-assessment activity and serves as the baseline for the project goals and scope.

Primary business drivers and goals for project success are to provide non-social security based student identifiers; integrate all student related system processes and data; support multiple concurrent academic calendars serving Ohio State's undergraduate, graduate and professional programs; assure that all current services are supported; and provide a system that has the flexibility to react to short term business requirements.

The project scope includes:

- Implement PeopleSoft Student Records, Advising, Financial Aid, Financials, Recruiting and Admissions modules.
- Implement shared PeopleSoft's Campus Community (shared Person Data model between HR and Student Administration).
- Replace Sigma's SAM Financial Aid System with PeopleSoft.
- Replace BARs Student Billing System with PeopleSoft.
- Use the PeopleSoft delivered room search function in conjunction with Schedule 25.
- Upgrade DARS (Degree Audit System) to version 3.5 and interface with PeopleSoft.
- Convert all existing legacy student systems data to PeopleSoft.
- Convert legacy student systems portions of the Operational Data Store and Student Data Warehouse to accept PeopleSoft data.
- Interface PeopleSoft to all admissions electronic applicant data.

The project is estimated to take between 36 and 45 months to complete, depending upon the number of modifications developed and the implementation sequence. PeopleSoft team training is scheduled to begin in FY06, Fit/Gap will start during the spring of 2006, system test will be in 2008, concluding with move to production in 2008/2009. The implementation will be based upon the business process life of a student. Time constraints in the implementation schedule are with Recruiting/Admissions which must be implemented during the summer and Student Financial Aid which needs to be active in January.

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Strategic Business Drivers

Remove Social Security Number as the Student Identifier

The University needs to provide very restricted uses of an individual's Social Security Number. The current student identifier is the Social Security Number.

Provide Consistent Information Sharing Across Functional Areas

The University needs to be able to provide consistent student related processes and information sharing across administrative, student and faculty users. The Student System is currently driven by 30-year old technology infrastructure. It has been amended and improved on an adhoc, "localized" basis, at times resulting in inconsistent processes and inconsistent data sharing across functional areas. The result is frequent manual manipulation of the data to derive the information needed.

Create Authoritative Data Source

There is a need for an authoritative source of student related data. Student-related data across multiple systems is currently redundant, not integrated and in some cases conflicting. Academic and administrative decisions are frequently made using incomplete, inconsistent and conflicting data, which is derived from many sources.

Create Manageable and Maintainable Systems

It is difficult to make regulatory requirement and guideline changes to the existing systems. Changes in the existing legacy systems are frequently time consuming and overly complex due to the "siloed" character of the different functional area systems.

Provide Effective Outcomes

The University needs concise, correct and easily accessed information to provide external reporting requests and to perform internal monitoring. Current information is difficult to extract, and too frequently requires manual summarization to achieve meaningful analysis.

Create Integrated Systems

The existing information systems consist of different architectures, different data structures, inconsistent data characteristics and hardware platforms. This environment makes it very difficult to utilize data for a given entity as it moves through these systems. Business analysis can be more efficiently performed if the requisite data is more easily available and consistent across the Human Resources, Treasurer and Student systems.

Scope and Objectives

Objectives

- Integrate numerous stand-alone systems and create an authoritative data source and consistency of information to enhance process flexibility, create real time data processes across functions, improve communications between departments, and increase support service to our students and internal customers as defined in the University Academic Plan.

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- Support multiple, concurrent academic calendars, while assuring the ability to move from a quarter system to a semester system, if necessary.
- Create an electronic support tool to improve the student experience.
- Support the delivery of “24/7” student Self Service functionality.
- Support the processes to measure recruitment and retention goals.
- Design and implement a consistent, flexible set of reporting tools and processes to ensure that each area’s reporting needs can be met within existing and newly supported technologies, while reducing the need to maintain auxiliary data stores.
- Support process re-engineering efforts as is necessary for project success.
- Support Central and End-User Training on the new system to ensure accuracy at the time of go live. (OUS, college offices, Office of the Treasurer).
- Maintain central management and support of the hardware and system software infrastructure.
- Migrate student administrative computer processes off of the mainframe computer so future upgrades to the mainframe infrastructure will be less costly.
- Provide more complete integration with the University’s existing Enterprise Resource Planning (ERP) systems to facilitate more efficient and effective utilization of enterprise data.
- Provide a system that has the flexibility to react to short term business requirements.

In-Scope

Included in the scope of the project is the implementation of an integrated student system, consisting of the following major components:

- Implementation will be based upon University’s existing Academic Calendar.
- This project will replace existing legacy system functionality, only taking advantage of added functionality if it can be cost justified and does not negatively impact the project’s budget and schedule.
- Legacy system data will be converted into the PeopleSoft System (see Project Business Alternatives Assessment).
- The Operational Data Store system will be included in this project (see Project Business Alternatives Assessment) and modification of the Student Data Warehouse to accept ODS modified data.
- Implementation activity to coordinate shared Campus Community elements among Office of Undergraduate Studies (OUS), Office of University Treasurer (OUT) and the Office of Human Resources (OHR) will be included as part of this project.
- PeopleSoft Student Financial Aid will be the management software and Sigma’s Student Aid Management (SAM) system will be discontinued.
- DARS 3.5 degree audit software package will continue to be the advising software and PeopleSoft will interface with it.
- College Net application process service will continue to provide internet capabilities for prospective students to submit admissions applications. Data collected through electronic services will be interfaced with PeopleSoft Recruiting and Admissions.
- Use the PeopleSoft delivered room search function in conjunction with Schedule 25.
- PeopleSoft Modules Included:
 - Academic Advisement, as needed to interface with OUS’s implementation of the Miami DARS Advising System.
 - Campus Community
 - Financial Aid
 - Recruiting and Admissions
 - Student Financials
 - Student Records

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- Campus Self-Service (Student Center and Faculty Center)
- Interfaces included in the scope of the project were identified during the Pre-Assessment Joint Application Design Sessions. A more thorough analysis will be completed during the project's Fit/Gap Analysis Phase. See Appendix C: Interfaces for a list of interfaces currently identified.
- Maintain current or develop interfaces for the existing mainframe recruiting system processes.
- Reports. An estimated range for Management Reports has been included in the project budget; however, the goal is to minimize the number of reports referencing the transactional system and direct as much reporting as is possible to the ODS or a Data Warehouse.

Out-of-Scope

- A PeopleSoft Enterprise Performance Management (EPM) operational data store/data warehouse will not be developed as a part of the Student Administration Project, but will be implemented at a later time.
- Data archiving will not be developed as part of this project, but will be considered at a later time.
- A third-party student loan system (SAL), maintained on the Office of the Treasurer's client server, will continue to provide loan functionality. The PeopleSoft Student Administration System does not have a module approaching the functionality of the SAL system and thus a change from that system is not under consideration.
- PeopleSoft Modules not included:
 - Contributor Relations
 - GradeBook
 - Involvement
 - PeopleSoft Portal
 - Customer Relations Management (CRM)
- Student related applications' in-house data managed by the Professional Schools' will not be converted during the first phase of this project. All processes currently supported by the legacy Student Information System will be converted and supported using PeopleSoft.

Project Business Alternatives Assessment

Legacy Data Conversion Strategy

All student administration data will be converted from the legacy data stores to the PeopleSoft SA databases. Both current and archived student data will be converted, including:

- Admissions and Prospect Databases
- Student Records Databases
- Student Financial Aid Databases
- Student Billing and Receivables Databases.

The conversion processes will include validation and correction of the existing data through manual data entry and automated processes where possible and eliminating Social Security Number as the key identifier for student data. During the conversion process, PeopleSoft EmplId processes will be initiated to create the EmplId as the key identifier for all students.

The Legacy Conversion will not include systems and databases related to Residence and Dining Halls, University Development, or Alumni. These systems will remain on the mainframe infrastructure and PeopleSoft SA interfaces will be developed to provide continued support. Additionally, no imaged or microfiche data will be converted.

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Operational Data Store Conversion Strategy

The goal of the Operational Data Store (ODS) conversion is to transition the source of the existing student-related data from the legacy databases to the PeopleSoft SA databases while maintaining the structure of the existing ODS. However, as part of this conversion, the student social security number identifier will be replaced with the PeopleSoft SA EmplId as the identifier. Additionally, as part of the conversion, PeopleSoft field names will replace the current ODS field names. These changes may require significant modification work by ODS users. Although this will impact ODS users, it is needed to provide consistency between the PeopleSoft SA system and the ODS.

The initial roll-out of the converted ODS will not contain a large volume of new data fields or tables, only those fields or tables that have been changed or added that are directly related to fields and tables in the current ODS. The ODS infrastructure will continue to use Microsoft SQL Server as its database management system. As a result of the ODS conversion activity, data used by the Student Data Warehouse will be modified to accept the PeopleSoft data and data marts and interfaces will be adjusted.

OSU Developed Training Strategy

Training activities will be managed centrally by the project team. This will allow the team to develop integrated, comprehensive training for system users. Both implementation and ongoing training will be developed. System training will be instructor-led, with job aids and step-by-step procedures available on-line. Instructors will be recruited from sponsor areas and colleges, and subject matter expertise will be a preferred attribute. All individuals who obtain system access must attend training. A detailed training plan will be developed before the project begins.

Communications Strategy

Communication activities will be managed centrally by the project team. This will allow the team to craft a clear, consistent message concerning the project and its impact on the diverse user community. A detailed project communication plan will be developed before the project begins.

Staffing Strategy

The project teams will be staffed by a combination of Ohio State employees, term-hire employees and consultants. The need to utilize this work-force of new staff members results from the current project teams' lack of experience with PeopleSoft applications and technology. This is also the first time that many of these team members will be exposed to a very large, very fast paced and long term ERP implementation project. Experienced PeopleSoft staff members will accelerate the learning curve and provide a "leg up" for our legacy system staff. The following break-down is planned for the new hire and consultant staffing:

AREA SUPPORTED	TERM HIRES	CONSULTANTS
Application Developers	15	15
Training Developers	4	3
Operations (DBAs, System Admin., Schedulers)	13	

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Project Management Office (Project Mgrs & Administrators)	11	
OUS Backfill	14	
OUT Backfill	2	

Assumptions

This Charter and the budget projections are based on the following key assumptions.

- The PeopleSoft Student Administration System will be implemented as delivered. Modifications must be justified and approved by the Executive Steering Committee. The Student System Modification Policy will be followed when analyzing each requested modification to the system (see Attachment B – Student System Modification Policy).
- Project Timelines will be agreed upon by the Pre-Assessment Implementation Management Planning Committee, Executive Steering Committee and Executive Sponsors before the project starts.
- OSU will allocate resources to both maintain the current student legacy systems and implement the PeopleSoft system.
- The project team will be centrally housed at the KRC facilities.
- Project Teams will be empowered by the University to make decisions regarding configuration, functionality and process changes. The project governance rules will clarify when a project decision will be escalated to the steering committee.
- Budget will be sufficient to complete the project based upon the Project Roadmap, Project Budget and Charter.
- Student Administration Project Fit/Gap will start May 2006, based upon HR 8.9 Upgrade Project Design Phase being complete.
- The project will create as minimal disruption to OSU business as is possible.
- Legacy system modifications will be limited to mandatory (government/mandated regulation, senior university initiative or audit requirement) requests.
- Project Team members will receive training.
- The appropriate resources, with the appropriate skills, will be available and assigned to the project as determined by the project plan.
- Data stewardship and accountability will be department-based as defined in the Faculty Rules and University Retention Schedule.
- Computer batch process software will be Autosys. Autosys is a computer scheduling package licensed from Computer Associates.
- The PeopleSoft Human Resource Management System will be upgraded to version 8.9 as a related, dependent project with a separate budget and management structure.
- Ongoing support needed for the PeopleSoft Student Administration System will be evaluated during the project, after the Design Phase.
- Major business process re-engineering and organizational change will be accomplished by the business and academic units and will be completed at appropriate times during the project schedule.
- OIT Partnership Management will supply ongoing support of Student Administration and Treasurer business units in the same manner the existing PeopleSoft business sponsors are supported. . .
- During the course of the project, there will likely be PeopleSoft service pack updates to the 8.9 software. These updates will be planned as part of the project.

Risks

The following items are identified as risks to the implementation:

- The staffing model is significantly dependent upon new hires and PeopleSoft experienced consultants. The large State of Ohio PeopleSoft implementation will be a major competitor for these skilled people.
- OSU staff retirements and competitive recruiting could negatively impact the project.

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- During the course of the Student Administration Project, several University technical initiatives will also be implemented. These projects will draw upon the same staff, functional and technical experts, participating in the Student Project. Each project was separately analyzed for resource needs, but the aggregate of all projects together may not be appropriately resourced. Additionally, existing technical resources and physical facility work space will be challenged. The concurrent initiatives that are currently known include:
 - PeopleSoft Financials Upgrade
 - Data Warehouse Initiatives
 - Implementation of other PeopleSoft purchased modules
- OSU Budget uncertainty due to state budget constraints.
- Availability of office space at KRC for the entire project team.
- Due to planned duration of the project, there will likely be turn-over of key staff members.
- During the project, both the Office of Undergraduate Studies and the Treasurer's Office may have major office moves.
- The business relationship with PeopleSoft may change with the Oracle acquisition.
- The extent of the validation and correction of legacy data is unknown, and may require significant work by the business units.
- The long planned duration of this project will require additional management attention to staff burn-out and morale issues.
- OIT staff participating on the project will also remain responsible for the ongoing support of existing production systems and processes.

Timeline and Implementation Strategy

The project is expected to take 36 to 45 months to complete, based upon the planned student life-cycle implementation.

Go-Live implementation will be performed on a "life of a student" business process schedule over several months. Two key processes must be implemented at specific times of the year. Namely, admissions and recruitment must be active, minimally, during the summer before the start of the new school year. Also, student financial aid must be active in January to permit acceptance of Federal guidelines for the next budget year. The key implementation sequence is Admissions and Recruitment before summer, Student Financial Aid in January, Registration in Spring and Disbursement in Fall.

A more detailed timeline will be developed as part of the detailed work planning that is currently underway. See Attachment D: Student Administration System Time-Line.

Cost of Ownership Analysis

Current Operational Costs as of FY05

OIT Application Development and Support Costs

Functional Area	FTE Supporting	Annual Earnings Cost of Support
Student Financial Aid	3 FTE	\$254,610
Student Records & Advising	5 FTE	\$424,350
Recruiting & Admissions	2.8 FTE	\$237,636
Student Financials (BARS)	1 FTE	\$84,870
Total Earnings Costs	11.8 FTE	\$1,001,466

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Functional Area	FTE Supporting	Annual General Funds Cost of Support
Management & Programming	2.65 FTE	\$236,034
Total General Funds Costs	2.65 FTE	\$236,034
Grand Total Development	14.45 FTE	\$1,237,500

OIT Operations Costs

		Annual Earnings Cost of Support
Admissions		\$323,239.40
Registrar		\$1,478,340.45
Student Financial Aid		\$1,287,692.49
Treasurer		\$250,465.47
Grand Total	FTE: 26.6	\$3,339,737.81

Projected After Implementation Ongoing Costs as of FY2010

Application Development and Support Costs

Business Areas Supported:

Module	OUS	OUT	OHR	COLLEGES
Academic Advising	X			X
Campus Community	X	X	X	X
Financial Aid	X	X		X
Recruiting & Admissions	X			X
Student Financials	X	X	X	
Student Records	X			X
DARS	X			X

Application Development Support Staff Projected:

Functional Area	FTE Supporting	Annual Earnings Cost of Support
Student Financial Aid	3 FTE	\$300,000
Student Records & Advising	4.5 FTE	\$450,000
Recruiting & Admissions	2.5 FTE	\$250,000
Student Financials	2.5 FTE	\$250,000
Campus Community	2.75	\$275,000
Management Team	4 FTE	\$400,000
DARS	.75	\$75,000

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Total Earnings Costs	20 FTE	\$2,000,000
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Application Development increases from FY2005 through FY2010:

Student Financials support increased by 1.5 FTE.

Campus Community is a new functionality not currently supported (2.75 FTE).

Management team shift to full-time managers (1.25 FTE).

General funds model for resource funding, not blended earnings rates, plus 3.5% increase for inflation.

Operations Costs

SIS ANNUAL OPERATIONS ESTIMATED COSTS	FY 2010
Personnel - 20 FTE's Salary (\$90K) , Benefits (31%) & S&S (\$3K)	\$2,418,000
Servers - replacement and maintenance – 4-6 Servers	\$708,719
Storage - replacement and maintenance – EMC – 40T	\$303,876
Oracle Maintenance - remaining portion of Enterprise site license	\$209,310
Autosys and other software	\$110,000
Facilities - replacement/maintenance (previously included in earnings)	\$319,070
Recovery of Physical Plant Assessment (FY 05)	\$99,400
Grand Total	\$4,168,375

Operations increases from FY2005 through FY2010:

Inflation on FY05 to FY 10 @ 3.5%	\$584,454
Operations Staff Reduction	(\$684,310)
Oracle	\$209,310
Servers	\$475,000
Space	\$99,400
EMC storage increase from 5 T to 40T	<u>\$144,783</u>
Operations Total Change	\$828,637

*Central University revenue lost due to shift from earnings to general funds. (\$198,060)

Change Management Costs

SIS ANNUAL OPERATIONS ESTIMATED COSTS	FY 2010
Personnel - 2 FTE (salary, benefits, supplies and overhead)	\$166,000
- Coordinating systems-related communications	
- Manage ongoing training program	
- Obtaining system user feedback	
- Developing new initiatives as needed	
Grand Total	\$166,000

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Dependencies

The successful completion of the SA project is dependent on the successful completion of the initiatives listed below:

- **Successful upgrade of DARS 3.5**, including Interactive Audit must be completed before Student Administration Project begins.
- **Successful completion of PeopleSoft Human Resources system upgrade to release 8.9 design phase** must be complete before Student Administration Project Fit/Gap Phase begins.
- **Successful completion of two PeopleSoft Tools Upgrades**
- **Hardware and Software Infrastructure changes** – Upgrades to the development or production hardware or software environment will play a significant role in the project timeline and budget. At this time, the following infrastructure upgrades can be expected during the life cycle of the project:
 - *One upgrade Brio system software*
 - *One upgrade Oracle database management software*
 - *One or two Unix operating system upgrades (database & app servers)*
 - *One Windows operating system upgrade (web servers, LAN servers, desktop environment)*
 - *One or two web server software upgrades*
 - *One or two Enterprise Storage Network control software upgrades*
 - *One backup system upgrade or replacement*
 - *One monitoring and control software upgrade*
 - *One scheduling software upgrade or replacement*
 - *One Cobol compiler upgrade*
- Business/Academic-unit process re-engineering will be completed.

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Project Foundations

Organizational Change Management

This project will affect many diverse constituencies. Change Management, for the purposes of this project, includes PeopleSoft user training development and delivery, project team (see Attachment A: Organization Chart) readiness activities, and project communications. Change management activities will be managed centrally by the project team to ensure completeness, accuracy, efficiency and effectiveness. Each business area will have significant input and responsibility to their direct constituencies, but training, readiness activities and external communications will be managed centrally. All business process reengineering efforts will be managed by the individual business units.

Fiscal Management

Budget control, reporting, tracking and approvals will be tightly managed by the Program Director, throughout the project life cycle to control costs. This will provide the management team the necessary information to proactively address any issues. Financial updates will be communicated regularly.

Scope Management

During the course of the Student Administration Project there will be times when a change or new modification, which is outside the approved project deliverables, is requested. The Scope Management Procedure provides the ability to manage and resolve these issues. This process utilizes the approved project charter, which establishes the baseline for project deliverables and timelines, decision documents and design documents as the standards against which the request is analyzed.

As new work or changes to existing deliverables are uncovered, a Change Request form is completed.

This form is utilized as the starting point from which the request is analyzed to determine the high-level resolution, impact to the project timeline, risks and costs associated with the change. The completed analysis is then approved or rejected for inclusion in the project. When a change is accepted, all appropriate, approved documents are updated and the change is incorporated into the project.

Staff/Human Resources Management

This project will run concurrently with other enterprise-wide projects (e.g., HR v8.9, Financials v8.9, Data Warehousing) and numerous staff involved in the Student Administration project will also be involved in the other projects. As work plans are developed it will be important to assess and include overhead associated with managing multiple projects.

Additionally, phases and milestones will be tracked closely. Phase containment will be an integral component of staff management and will incorporate both Kick-off sessions at the beginning of each phase to explain roles, deliverables and milestones as well as Lessons Learned sessions at the end of each phase. Proactively planning for life events and staff time off is essential to project success.

Identity Management

An Identity Management (IdM) system is an essential component to the implementation of an integrated Student Information System. Implementation of an IdM system will start prior to the start of either the HR upgrade or the Student Administration System implementation project.

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Key objectives of the IdM system implementation include:

- Tight integration between the Student Administration System and the IdM systems. Many participants on the IdM project will naturally transition to become members of the SIS Campus Community team. Make use of PeopleSoft HR/SA v8.9 as the true information source for IdM, and build automated feeds between the two systems.
- Elimination of the use of social security numbers as unique identifiers, and mask their use whenever feasible. This is a direct tie-in to the Social Security Number Remediation Project.
- Enable single sign-on or federated login capabilities to University computing resources to the maximum extent possible, including an enterprise Microsoft Active Directory Services domain.
- Implementation of a two-factor authentication scheme for users with access to sensitive resources.
- Identification of University affiliates that will be reflected in the IdM database. Most, but not all, University affiliates will be included. Some examples of excluded affiliates might be patients at University hospitals and clinics, and short term University guests. Once an individual is entered into the IdM database, the expectation is that their unique identity will follow them throughout their University career, from “cradle-to-grave.”

Decision Making

Functional and Technical Decisions:

Recommendations for major functional decisions will be facilitated by Functional Leads, reviewed by relevant advisory team(s), and approved by the Executive Steering Committee.

Business Process Analysis

The fit-gap analysis will:

- Look for opportunities to implement “best practice” business processes made available by the system.
- Validate all business processes in the new software
- Catalog fits, gaps and issues found
- Draft recommendations to resolve gaps and issues found

These recommendations will be used to present users with a comprehensive view of the new system and will become the baseline for future changes. OUS and OUT will also dedicate staff to serve as liaisons between the project team and the business/academic units staff and user community. The OUS/OUT resource will have a critical function in communicating and facilitating the business process reengineering effort within the business/academic units that will be a by-product of implementing and supporting the PeopleSoft Student Administration system.

Human Resources and Student Systems Integration

The upgrade from PeopleSoft HRMS 8 Service Pack 1 to HRMS 8.9 is a pre-requisite for implementation of Student 8.9. The design phase of the HRMS Upgrade will be complete before the fit-gap analysis phase of the Student project begins.

Scope of the HR Upgrade to 8.9 is to bring forward and enhance functionality of current processes, which includes the following modules: HRMS, Payroll, Benefits Administration, Time & Labor, Medical Center eProfile, Medical Center eRecruit, and existing interfaces sent to and from the HR System. No new

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modifications or functionality will be implemented as part of the HR Upgrade, nor will any current customized processes be replaced by PeopleSoft's delivered processes during this upgrade.

Timeframe for the HR Upgrade to 8.9 is twelve-months, based on previous upgrade experience. Start date for the upgrade is November 2005, after the completion of a number of initiatives the Office of Human Resources has planned for Fall Quarter (move to Gateway, implementation of Salary and Labor Distribution Planning and Open Enrollment).

The upgrade of the HR System to 8.9 includes the implementation of the Person Model concept. The Person Model concept allows for tracking of all individuals related to the University, whether they are an employee, a student, and other "persons of interest" affiliated with the University. The Person Model concept establishes the link between the HR and Student Systems via the Student Campus Community module. Because of these links and interdependencies between the two systems, representatives from the Office of Human Resources and Office of Undergraduate Studies will work together during the analysis and design phases of the HR Upgrade to define the use of the shared set-up tables and values.

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Approvals

I understand and agree with the goals, scope and objectives, recommendations and approach as described in this document.

I approve the start-up of this project within the scope outlined in this document. I understand that changes in scope, budget or major timeline milestones require the approval of system sponsors and executive sponsors.

Executive Sponsors

Barbara Snyder

Ilee Rhimes

Bill Shkurti

Larry Lewellen

Executive Steering Committee

Martha Garland

Nancy Campbell

Mike Veres

Jeff Allen

Leslie Flesch

Kay Meyer

Stakeholders

Brad Myers

Tally Hart

John Ellinger

Mabel Freeman

Al Rodack

Nance Hoza

Technology Stakeholders

Nanci Gobey

Diane Owens

Glenn Donaldson

Geoff Wisniewski

Mitch Dysart

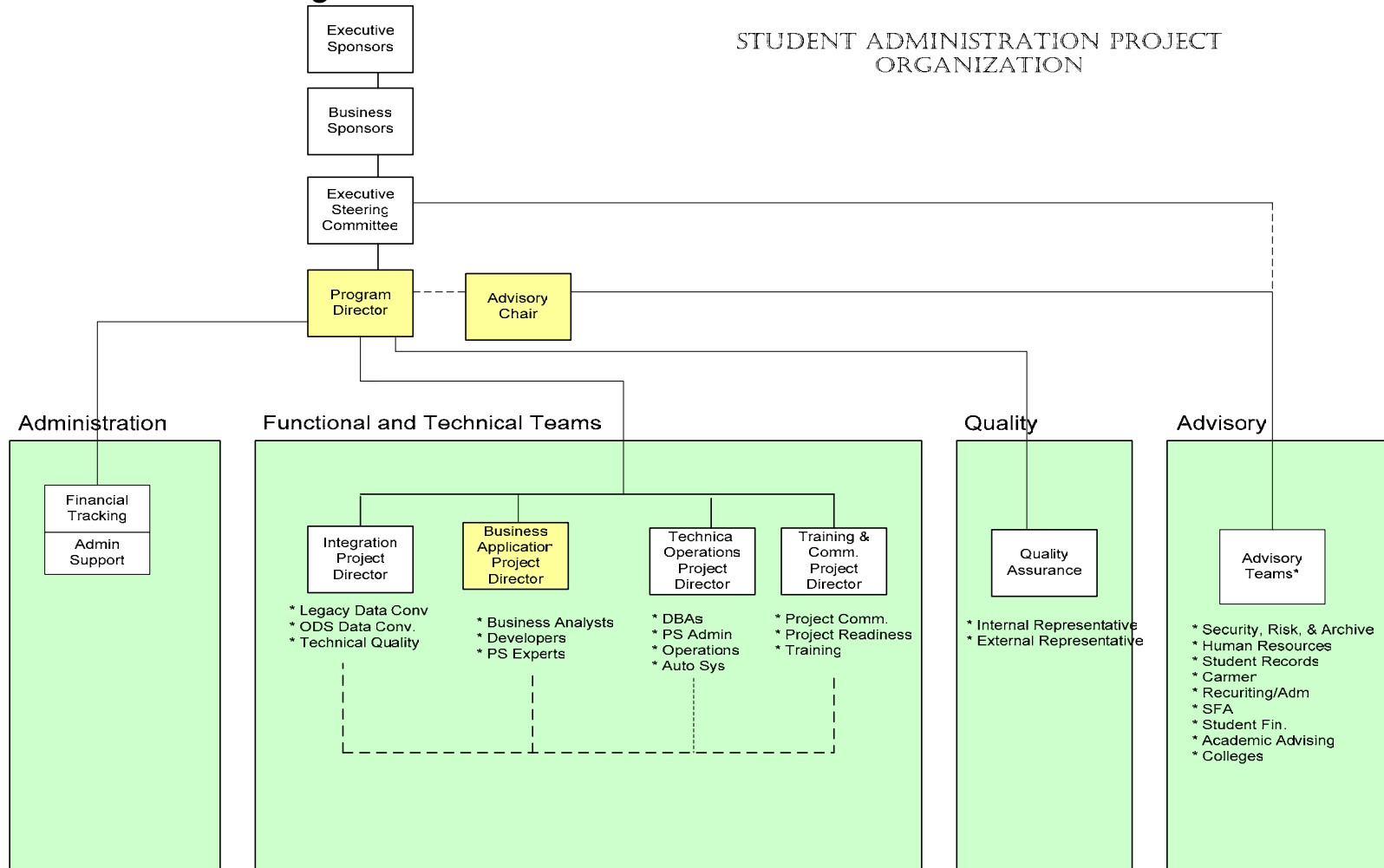
Bill Karl

Rick Termeer

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Attachment A – Organization Chart



*Advisory Teams consist of the Directors and Academicians

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Attachment B - Student System Modification Policy

It is The Ohio State University's stated goal to take advantage of the enhanced functionality as confirmed during the Pre-Assessment process, including processes specific to higher education, which PeopleSoft provides in its Student Administration software.

In the interest of using the "best practices" inherent in the latest version of the software, as well as in facilitating future software upgrades, the ideal upgrade and installation will use the delivered modules and objects, while adding as few custom modifications as possible. However, it is understood in some cases, a modification will be necessary. The following describes the criteria that will be used to determine the modifications to the delivered software that will be approved for this implementation of PeopleSoft Student Administration.

Any proposed modification to the system must meet one of the following criteria:

- The alternate solutions (workarounds or delivered functionality) represent a substantially more difficult or more complicated process and do not represent "best practices" or process simplification. Or,
- The alternate solutions will incur a greater cost to OSU than the cost of the modification and do not represent a move to "best practices" or process simplification. Costs to be considered are
 - Software and hardware development, upgrade and maintenance
 - Change Management
 - Business area staff effort; Or,
- It is a legal, regulatory, or audit requirement

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Attachment C – Interfaces (Identified from Pre-Assessment JAD)

Module	Interface
Campus Community	HR/Student Shared Information
Campus Community	Libraries
Campus Community	Health Systems
Campus Community	Software Companies
Campus Community	Computer Labs
Campus Community	Judicial Affairs
Campus Community	Student Affairs
Campus Community	Facility Security
Campus Community	District High Schools
Campus Community	School/Agencies
Campus Community	Web Forms (individual forms not enumerated)
Campus Community	Architects Office
Campus Community	Publications
Campus Community	Grants Office
Campus Community	Ohio National Guard
Campus Community	Software Companies
Campus Community	Imaging
Campus Community	Professional Schools
Campus Community	Regional Schools
Campus Community	Alumni
Campus Community	Buckid
Financial Aid	ISIR Records
Recruiting & Admissions	Event Registration via Web
Recruiting & Admissions	Prospect Data Interface
Recruiting & Admissions	Grad Admissions Web Interface
Recruiting & Admissions	SEVIS part1 - Applicants/Admitted
Recruiting & Admissions	BankOne - Acceptance Fees
Student Financials	Other OSU Dept: Negative Indicators/Hold
Student Financials	RDH Charges for food & lodging
Student Financials	BancOne/LockBox
Student Financials	Accounts Receivable System
Student Financials	BancOne/Direct Deposits
Student Records & Advising	Commencement
Student Records & Advising	Athletic System & NCAA/Big10 Reporting
Student Records & Advising	Production Instructor Surveys
Student Records & Advising	Desire2Learn (Course/Grades)
Student Records & Advising	DARS - Degree Audit
Student Records & Advising	Enrollment Certification
Student Records & Advising	Math Placement Test
Student Records & Advising	Foreign Language Test
Student Records & Advising	Orientation
Student Records & Advising	Faculty Test Scores

Project Charter

PeopleSoft Student Administration Project

Student Records & Advising	Board Of Regents (Reports?)
Student Records & Advising	National Student Loan Clearing House
Student Records & Advising	Local Schools
Student Records & Advising	Football Tickets/Ticket Eligibility
Student Records & Advising	Continuing Ed
Student Records & Advising	College Databases
Student Records & Advising	Residence & Dining - Fees
Student Records & Advising	Residence & Dining - Address Info.
Student Records & Advising	Schedule25
Student Records & Advising	CAS - Course Applicability System
Student Records & Advising	Course Approval
Student Records & Advising	Selective Service
Student Records & Advising	SEVIS part 2 - Enrolled Students
Student Records & Advising	Bookstores
Student Records & Advising	ODS
Student Records & Advising	Transcript Request/Credentials
Student Records & Advising	International Grades
Student Records & Advising	UNITS

Project Charter
PeopleSoft Student Administration Project

Attachment D – Student Administration System Project Time-Line

ID	Task Name	2006					2007				2008				2009			
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	
1	PS Team Training	[Gantt bar spanning Q4 2006 to Q1 2007]																
2	Project Pre-Planning	[Gantt bar spanning Q1 2007 to Q2 2007]																
3	Fit/Gap	[Gantt bar spanning Q2 2007 to Q3 2007]																
4	Design	[Gantt bar spanning Q3 2007 to Q4 2007]																
5	Development & Unit Test	[Gantt bar spanning Q4 2007 to Q1 2008]																
6	Integration (String) Test	[Gantt bar spanning Q1 2008 to Q2 2008]																
7	System Test	[Gantt bar spanning Q2 2008 to Q3 2008]																
8	User Acceptance Test	[Gantt bar spanning Q3 2008 to Q4 2008]																
9	Load/Stress Test	[Gantt bar spanning Q4 2008 to Q1 2009]																
10	Performance Test	[Gantt bar spanning Q1 2009 to Q2 2009]																
11	Legacy Conversion	[Gantt bar spanning Q4 2006 to Q1 2007]																
12	Operational Data Store Conversion	[Gantt bar spanning Q2 2007 to Q3 2007]																
13	Change Management	[Gantt bar spanning Q3 2007 to Q4 2008]																
14	Move to Production Test	[Gantt bar spanning Q1 2008 to Q2 2008]																
15	Implement into Production	[Gantt bar spanning Q2 2008 to Q3 2008]																