

Executive Sponsors Meeting
01/09/2017

Major Project Updates

Agenda

- Pathway Planner (FACES Phase 2b)
- SEVIS Process in PeopleSoft
- COBRA Extract for Third Party System
- RFI for POS for Dining Services
- OnBase 16 Upgrade
- Webcheckout Implementation
- EAB SSC Interface for Graduate Students*
- PeopleSoft Security Request Form Phase 2
- Falcon Info: Academic Financials
- Falcon Info: Provost Performance Metrics
- Donor Data Workflow Migration – Allegiance – Agilon Synergies
- Academic Works Phase II
- Slate Phase IV
- Modo – Phase 2 Enhancement
- Book store Campus Integration
- DocuSign eForm Enhancement
- Create Electronic Meal Plan Change Form
- Automate Freshman Matriculation
- Avalon Multimedia System
- FMS 9.2 Upgrade
- Modifications to Contract Pay Status
- RFP for Electronic Transcripts

Monthly Summary – January 2, 2017

Pathway Planner is an add-on to Scheduler Planner, which is already in use by students and advisors. This module will allow users to plan their four-year course load using actual class offerings in combination with advisor-defined program templates. Vendor presentations have been given to the University advising community including UASC. Responses from these sessions has allowed planning for every incoming student to have an outline for degree completion. We have also provided feedback to the company which they expressed interest in utilizing. A sampling of the 300 academic program templates will be available for advisors and students by the end of January. Pathway Planner will be utilized for all SOAR students this summer.

Past Month's Key Accomplishments

- Development: Academic program documentation in progress
- Configuration: TEST user setup complete
- Configuration: TEST pathways created
- Training: Advisor demonstrations complete
- Implementation: Pilot advising group identified

Upcoming Milestones

- 1/31/17: Sample program templates in production

Project Milestones

Status	Week Beginning (Sunday Date)	Sep-18	Sep-25	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29
Week Number		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Initialization																					
Cmplt	Project Kickoff				X																
Cmplt	Project Planning	X	X	X																	
Cmplt	Resource Procurement					X	X														
Implementation																					
Cmplt	Update Scheduler Planner to Newest Image					X															
Cmplt	Test CSS Integration - QNA					X	X	X	X												
Cmplt	Test CSS Integration - PPD									X	X										
Cmplt	Vendor Customization Webinar											X									
Cmplt	Production Migration												*								
Configuration																					
Cmplt	Advisor Demonstration and Training													X	X	X	X	X	X		
Cmplt	User Test Security Setup													X	X	X	X	X	X		
On Trk	Academic Program Template Validation					X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
On Trk	Academic Program Pathway Creation															X	X	X	X	X	X
Nt Strtd	Student Advising Implementation																				*

Monthly Summary – January 2, 2017

SEVIS Process project to develop a PeopleSoft process to transmit International Student data from PeopleSoft to SEVIS via a secure PeopleSoft-resident process. Current dates for testing and development are on the project plan. Application engine development, beta testing and QNA setup table configuration continue on schedule. The implementation date has been moved to 1/15/2017.

Past Month's Key Accomplishments

- QNA Testing has been extended by two weeks
- International Programs resources require more time for integrated testing
- Training sessions held by International Programs staff
- Certificate for production SEVIS batch data transfer has been obtained
- CIP Code table "Use this code for SEVIS" indicator is being updated for programs eligible for International students

Upcoming Milestones

- QNA Testing will be completed by end of week 1/8/17
- PPD Testing is scheduled through the week of 1/12/17
- Production migration is scheduled for 1/15/17

Project Milestones

Status	Week Beginning (Sunday Date)	Mar-6	Mar-13	Mar-20	Mar-27	Apr-3	Apr-10	Apr-17	Apr-24	May-1	May-8	May-15	May-22	May-29	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	40	41	42	43	44	45	46	47
Initialize																						
Cmplt	Project Planning	X	X	X	X	X	X	X	X	X												
Cmplt	Design Solution		X	X	X	X	X	X	X	X	X	X	X									
Cmplt	Project Kick-Off		X																			
Analyze, Design, & Development																						
Cmplt	Finalize Technical Specs/Requirements		X	X	X	X	X	X														
On Trk	Setup Tables Definition		X	X	X	X	X	X	X	X												
On Trk	SEVIS Account Definition																					
Cmplt	Obtain SEVIS Certificate						X	X	X	X												
On Trk	Application Engine Development																					
On Trk	Setup Row Level and T/L Security (DEV)																					
On Trk	Unit Test (DEV)																					
On Trk	QNA Migration/Configuration																					
Test																						
On Trk	Testing/Defect Resolution (QNA)												X	X	X	X	X	X	X			
Nt Strtd	PPD Migration/Configuration															X					X	
Nt Strtd	Testing/Defect Resolution (PPD)														X	X					X	X
Implement																						
Nt Strtd	Communication to Campus/Training																				X	
Nt Strtd	Production Configuration																				X	
Nt Strtd	Production Migration																					X
Nt Strtd	Execute New Process																					★

COBRA Extract for Third-Party System

Project Status: **GREEN**

Monthly Summary – January 2, 2017

Create a PeopleSoft process that transmits employee health benefit data from PeopleSoft to a COBRA third-party vendor system (Chard Snyder) via a secure data transmission method. The process will provide automation when sending data to the COBRA provider and maintain compliance for BGSU with accurate data and timely delivery of benefit information. Original due date of 10/16/2016 has been changed to coincide with benefit coverage changes starting at the beginning of the coverage year—1/15/17. Contact has been made with the Chard-Snyder third-party vendor for technical assistance and test file transmission.

Past Month's Key Accomplishments

- QNA re-testing is complete with the functional user approving the process; PPD testing will happen this week
- Test files have been sent to the vendor from the CSSQNA environment, requesting the vendor's final approval

Upcoming Milestones

- PPD Testing scheduled for 1/2/17 thru 1/12/17
- Project on track for 1/15/17 Production Migration so it is ready for execution the fourth week of the calendar year

Project Milestones

Status	Week Beginning (Sunday Date)	Aug-7	Aug-14	Aug-21	Aug-28	Sep-4	Sep-11	Sep-18	Sep-25	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	
Initialize																											
Cmplt	Project Planning	X	X																								
Cmplt	Design Solution		X																								
Cmplt	Project Kick-Off		X																								
Analyze, Design, & Development																											
Cmplt	Finalize Technical Specs/Requirements		X	X	X	X	X	X																			
Cmplt	Define COBRA Third-Party File Transmission		X	X	X	X	X	X	X	X																	
Cmplt	Application Engine Development				X	X	X	X	X	X	X																
Cmplt	Setup Row Level and T/L Security (DEV)						X	X																			
Cmplt	Unit Test (DEV)						X	X	X	X	X																
Cmplt	QNA Migration/Configuration											X															
Test																											
Cmplt	Testing/Defect Resolution (QNA)												X	X	X	X	X	X	X	X	X	X					
On Trk	PPD Migration/Configuration																		X				X				
On Trk	Testing/Defect Resolution (PPD)																		X	X			X	X			
Implement																											
On Trk	Communication to Campus/Training																						X	X			
Nt Strtd	Production Configuration																									X	
Nt Strtd	Production Migration																									X	
Nt Strtd	Execute New Process																										★

POS System Selection for Dining Services

Project Status: **GREEN**

Monthly Summary – January 2, 2017

BGSU is requesting information from qualified vendors that can provide a Point of Sale System solution, primarily to be used by BG SU's Dining Services, but with the capability to possibly expand to the campus Bookstore. This project is to contact the vendor (Sequoia/Blackboard), and, if the system is acceptable, execute a contract by 1/7/2017.

Past Month's Key Accomplishments

- Received price quotes from vendor; awaiting discounted prices
- Completed customer discussions (hosted and on-prem)
- Completed hosted/on-prem cost analysis
- ESC approved implementation based on successful contract
- Negotiating with vendor on SLA/Up-Time Credit contract
- Working with Purchasing/vendor to use Blackboard contract

Upcoming Milestones

- Analyze SOW, discounted price quotes, hardware
- Review business processes where gaps have been identified
- Request legal review of vendor contract (if needed)
- Vendor has not responded to requests for discounted prices
- Project team's decision to move forward by 1/15/17

Project Milestones

Status	Week Beginning (Sunday Date)	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Initialize															
Cmplt	Project Planning	X	X												
On Trk	Product Analysis		X	X	X	X	X	X							
Cmplt	Project Kick-Off		X												
Analyze, Interview, & Document															
Cmplt	Finalize Request for Information		X	X	X										
Cmplt	Schedule On-Campus Demonstration		X	X	X	X	X	X	X	X					
On Trk	Evaluate Responses				X	X	X	X	X	X	X				
Cmplt	Define and agree on success criteria						X	X							
On Trk	Finalize Technical/Functional Requirements						X	X	X	X	X				
On Trk	Define Required Interfaces						X	X	X	X		X			
Selection															
On Trk	Formalize Contract/Prices							X	X	X	X		X	X	X
Nt Strtd	Legal Services Review					X	X	X	X	X	X	X	X	X	X
Nt Strtd	Execute Contract									X	X			X	X
Implement															
On Trk	Define Implementation Calendar/Project Plan						X	X	X	X	X	X	X	X	X
Nt Strtd	Determine Training Requirements							X	X	X	X	X	X	X	X
Nt Strtd	Enterprise Configuration Recommendations								X	X	X	X	X	X	X
Nt Strtd	Site Survey												X	X	★

OnBase 16 Upgrade

Monthly Summary – January 2, 2017

The ITS development team has completed 90% of their unit testing after an announced vendor defect necessitated the reinstallation of all OnBase v.16 environments. We have two cases open with Hyland to address a scanning error and PeopleSoft single sign on. Both use cases are supported by documentation but are not working in our environment. Upon resolution we will immediately move to functional user testing. Alternate go-live dates have been identified but planning for the actual migration date will be on hold until our vendor has fixes in place.

Past Month's Key Accomplishments

- Testing: Unit testing by ITS staff near completion

Upcoming Milestones

- ASAP: Beginning of User Acceptance Testing
- TBD: Go-Live

Project Milestones

Status	Week Beginning (Sunday Date)	Jun-5	Jun-12	Jun-19	Jun-26	Jul-3	Jul-10	Jul-17	Jul-24	Jul-31	On Hold	Sep-25	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19		
Week Number		5	6	7	8	9	10	11	12	13		15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	37	38	39	40	41	42		
Initialize																																			
Cmplt	Project design and solution identification	X																																	
Cmplt	Testing design	X	X																																
Cmplt	Unity client purchase			X																															
Development																																			
Cmplt	Build DEV server environment																																		
Cmplt	Install OnBase 16 software	X														X	X																		
Cmplt	Develop Unity client package installer				X	X	X	X								X	X																		
Off Trk	ITS Unit testing			X	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X							
Testing																																			
Cmplt	Build TEST environment and configure network			X	X	X																													
Cmplt	Install OnBase 16 software												X			X																			
Nt Strtd	Migrate to TEST environment																																		
Nt Strtd	Test Unity client installation																																		
Nt Strtd	User Acceptance Testing																																		
Implementation																																			
Cmplt	Build PROD server environment and configure network																				X	X													
Nt Strtd	Install OnBase 16 software																																		
Nt Strtd	Push Unity client installation																																		
Nt Strtd	Enact campus communications plan																																		
Nt Strtd	Migrate to production																																		★

Monthly Summary – January 2, 2017

The project continues on schedule as we finish up the development and testing of SSO integration and Patron Data integration within Webcheckout next week. The functional department leads are currently uploading their equipment inventory list into Webcheckout. The Go Live date has been changed to Jan. 17th to accommodate end user training availability and to finish up Patron Data integration. The Go Live Plan continues to be finalized to include all configuration tasks, training, and communication tasks.

Past Month's Key Accomplishments

- Environment: Webcheckout checkout centers have been created and are currently being configured along with training
- Development: Patron Data integration development is complete. SSO development is at 90% complete
- Final Department Inventory imports are currently being uploaded into webcheckout

Upcoming Milestones

- SSO and Patron Portal testing completes January 13th
- Department Equipment Inventory imports ends December 6th
- End User Training January 11th-13th
- Finalize Go Live Plan

Upcoming Events

- End User Training will be completed January 11th-13th

Project Milestones

Status	Week Beginning (Sunday Date)	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	
	Initialize																	
Cmplt	Project Planning	X	X	X	X	X												
Cmplt	Project Kick-Off					X												
	Analyze, Design, & Development																	
Cmplt	Finalize Technical Specs/Requirements					X	X											
At Rsk	SSO Integration Development					X	X	X	X	X	X	X	X	X	X	X		
Cmplt	Patron Data Integration Development					X	X	X	X	X	X	X	X	X	X	X		
Cmplt	Department Equipment Inventory creation						X	X	X	X	X	X	X	X	X	X		
On Trk	Department Inventory Import											X	X	X	X			
On Trk	Department Training												X	X				
	Test																	
On Trk	Testing Round 1 (QNA)										X	X	X	X	X			
On Trk	Defect Resolution (QNA)											X	X	X	X			
On Trk	Testing Round 2 (QNA)												X	X	X	X		
	Implement																	
Nt Strtd	Communication to Campus														X	X		
Nt Strtd	Production Configuration														X	X	X	X
Nt Strtd	Go Live week																	★



Monthly Summary – January 2, 2017

Update the SSC interface to send graduate student information and courses to EAB's SSC. Also, to allow the Learning Commons, STAC, and Librarians to serve graduate students better and more efficiently using the same tool available to undergraduate students. Project was completed the week of December 18, 2016.


Past Month's Key Accomplishments

- Production Migration/Testing – week of Dec 4th
- Solution target delivery date – week of Dec 18th

Upcoming Events

- Support as needed.

Project Milestones

Status	Week Beginning (Sunday Date)	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18
		1	2	3	4	5	6	7	8	9	10	11	12
Initialize													
Cmplt	Project Planning	X											
Cmplt	Design Solution		X										
Cmplt	Project Kick-Off			X									
Analyze, Design, & Development													
Cmplt	Meet w/EAB to resolve existing undergrad issues				X								
Cmplt	Meet w/EAB to better understand extract data schema				X								
Cmplt	Finalize Functional Requirements (e.g., pop. of grads)			X	X								
Cmplt	Finalize Technical Specs/Requirements			X	X								
Cmplt	Develop Solution					X	X	X					
Test													
Cmplt	Testing Round 1 (QNA)								X				
Cmplt	Defect Resolution							X					
Cmplt	Testing Round 2 (if needed)									X			
Implement													
Cmplt	Communication to Campus/Training										X	X	
Cmplt	Production Migration										X		
Cmplt	Testing (PPD)										X	X	
Cmplt	First Live Feed to EAB SSC												

PeopleSoft Security Request Form Phase 2

Project Status: **YELLOW**

Monthly Summary – January 2, 2017

This project is an extension of an initial PeopleSoft security request form, with 8 additional changes. Due to the extensive amount of development required for the additional changes, we are requesting to move the completion date to 2/19/17.

Past Month's Key Accomplishments

- Developed design solution

Upcoming Milestones

- Complete code review
- Test QNA
- Test PPD

Project Milestones

Status	Week Beginning (Sunday Date)	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15
		1	2	3	4	5	6	7	8	9	10	11
Initialize												
Cmplt	Project Planning	X										
Cmplt	Design Solution		X	X								
Analyze, Design, & Development												
Cmplt	Finalize Technical Specs / Requirements			X	X							
Cmplt	Develop designed solution					X						
Cmplt	Unit Testing of Code Changes						X					
Off Trk	Code Review							X				
Test												
Nt Strtd	Functional Testing							X	X	X		
Nt Strtd	Defect Resolution									X	X	
Nt Strtd	Group Communication										X	
Implement												
Nt Strtd	Production Migration											X
Nt Strtd	Go Live - System is now in production											★

Monthly Summary – January 2, 2017

The project status is Green. Student Revenue has been validated by finance with the Masters of Public Health as the remaining issue. This issue will not prohibit a move to production. Validation of Class Expense in near completion with some rework being required allocate all instructors when more than one primary instructor is listed for the course. Initial P&L statements have been developed.

Past Month's Key Accomplishments

- Continued validation of Class Expense and Student Revenue
- Began development of future reports to include a P&L statement
- Conducted initial review of P&L reports for feedback
- Migrated Student Revenue from to the Production Environment

Upcoming Milestones

- Include all instructors listed for each course
- Complete validation of Class Expense
- Migrate Class Expense to Production
- Account for 30/70 split of allocation
- Complete P&L Statements and Contribution Margin reports

Project Milestones

Status		Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26
															14								
Project Timeline																							
Cmplt	Validate Student Class Revenue in DEV	X	X	X	X																		
Cmplt	Migrate Student Revenue to QNA				X	X	X																
Cmplt	Student Reveune in Production						X	X	X	X	X	X	X										
Cmplt	Validate Class Expense in DEV	X	X	X	X	X	X	X	X	X	X												
Cmplt	Migrate Class Expense to QNA							X	X	X	X	X											
On Trk	Class Expense in Production										X	X	X	X	X	X	X	X	X	X	X	X	X
On Trk	Development of P&L Statement			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
On Trk	Complete Contribution Ratio Report										X	X	X	X	X	X	X	X	X	X	X	X	★

Monthly Summary – January 2, 2017

The project status is Green. Structures to meet each Performance Metric are being developed, validated and migrated to Production in accordance with user requirements. Three Performance Metrics are currently in Production. Metrics 7, 9 and 12 are currently in Development. All metrics are scheduled to be in production by the end of the Fiscal Year for use in the Fall 2017 term.

Past Month's Key Accomplishments

- Service Learning has been converted to a Student Attribute within the Data Warehouse and migrated to QNA for testing
- Student Class Revenue has been validated is now in Production
- Validation of Class Expense is very near completion
- 60 Credits hour reports have been developed, waiting on process to add transfer credits

Upcoming Milestones

- Completion and validation of Service Learning (this design will be the model for all other experiential learning requirements)
- Complete validation of Class Expense (include all instructors)
- Import transfer credits into the Data Warehouse to include in Metric 12
- Begin development of FTFT and FTIC cohorts for student retention

Project Milestones

Status	Week Beginning (Sunday Date)	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	Mar-5	Mar-12	Mar-19	Mar-26	Apr-2	Apr-9	Apr-16	Apr-23	Apr-30	May-7	May-14	May-21	May-28	Jun-4	Jun-11	Jun-18	
		13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	
Cmplt	PPM 1: New Freshmen and Total Students																																
Nt Strtd	PPM 2: FTFT Retention							X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	★
Cmplt	PPM 3: Number of Graduates																																
Nt Strtd	PPM 4: Collaborative Research					X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		
Nt Strtd	PPM 6: Global Immersion Experience					X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		
On Trk	PPM 7: Service Learning	X	X	X	X	X	X	X	X	X	X	X																					
Nt Strtd	PPM 8: Learning Communities					X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X										
On Trk	PPM 9: Contributin Margin	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																	
On Trk	PPM 12: 60 Credits in two years	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X															
Cmplt	PPM 14: SCHs Lost to DFW																																

Monthly Summary – January 2, 2017

Currently donor data currently goes into WBGU-TV's donor database system, Allegiance, while the funds go directly into the University Foundation system, Agilon. Reconciliation of donor data and the funds requires manual processes for both parties. This project will facilitate the change of data flow from ACD Direct to the University Foundation system and then on to WBGU-TV's donor database system, Allegiance, for continuity of services and reports specific to Public Television and the needs of WBGU-TV.

Past Month's Key Accomplishments

- Initial run through of changes for ACD Direct to make has been completed. This data feed will need approval from WBGU, Bursar and UA before formal submission can be made to ACD.

Upcoming Milestones

- Supply ACD with needed data changes. Changes could take 4-6 weeks.

Upcoming Events

- Targeted completion date: Week of 12 February 2017 at the earliest.

Project Milestones

Status	Week Beginning (Sunday Date)	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Initialize																			
Cmplt	Project Planning/Charter	X	X	X															
Cmplt	Project Kick-Off			X															
Analyze, Design, & Development																			
Cmplt	Develop functional requirements			X	X														
Cmplt	Tech Specs for Data Flows from ACD Direct to Agilon				X	X	X												
Cmplt	Tech Specs for Data Flows from Agilon to Allegiance				X	X	X												
On Trk	Develop both interfaces						X	X	X	X	X	X	X	X					
On Trk	Evaluate need for duplicate record workflow remediation								X	X	X	X	X	X					
Test																			
Nt Strtd	Testing Round 1													X	X	X	X		
Nt Strtd	Defect Resolution													X	X	X			
Nt Strtd	Testing Round 2 (if needed)														X	X	X		
Implement																			
Nt Strtd	Production Migration																		X
Nt Strtd	Go-Live																		★

AcademicWorks Phase 2

Project Status: **GREEN**

Monthly Summary – January 2, 2017

This past month the team continued to work on the process that will be used to pull the fund information out of AcademicWorks. The team will be meeting this month to review the PeopleSoft fields being used in this process and the security roles that will need to be applied for this new process. Due to a heavy workload Boise was not able to contact BGSU and will not have time for the foreseeable future. The project is on target and trending green.

Past Month's Key Accomplishments

- Development Continues

Upcoming Milestones

- Finalization of PeopleSoft fields
- Migration to QNA
- Finalization of security roles

Project Milestones

Status	Week Beginning (Sunday Date)	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Initialize															
Cmplt	Information Gathering	X													
Cmplt	Resource Gathering		X												
Cmplt	Project Kick-Off		X												
Analyze, Design, & Development															
On Trk	Development		X	X	X	X	X	X	X	X	X	X			
Nt Strtd	Migration to QNA												X		
Nt Strtd	Migration to PPD													X	
Test															
Nt Strtd	User Testing (Concurrent)												X	X	
Nt Strtd	Defect Resolution (Concurrent)												X	X	
Implement															
Nt Strtd	Production Migration														X
Nt Strtd	Go Live - Process is now in production														★

Monthly Summary – January 2, 2017

Three stages of admissions applications started in UAS (started-not submitted, submitted-no decision and submitted-with decision) have now been moved into Slate. Project documentation e.g. project charter, project timeline, project dashboard have been completed. Requirements for ISS visa permit validation have been completed and SSN validation issue has been resolved. Training is an ongoing process.

Past Month's Key Accomplishments

- A timeline has been established for the project
- Project charter has been completed
- ISS requirements for visa permit import have been finalized
- Kick-off meeting on 12/6/2016
- Further training sessions have taken place on 12/14 & 12/19
- SSN validation issue has been resolved

Upcoming Milestones

- Complete ISS requirement changes
- Finalize requirements for GPA summary
- Establish requirements for test score templates

Upcoming Events

- Further training sessions

Project Milestones

Status	Week Beginning (Sunday Date)	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13
	Initialize													
On Trk	Project Planning	X	X											
On Trk	Design Solution	X	X											
On Trk	Project Kick-Off	X	X											
	Analyze, Design, & Development													
Nt Strtd	Issue: International Students w/ Ohio Residency		X	X										
Nt Strtd	Issue: Applicants previous name(s) import into CSS		X	X										
Nt Strtd	Issue: SSN validation to SSA's standards			X	X									
Nt Strtd	Issue: CEEB code tables with Slate and CSS significantly different and are used for institution matching	X	X	X										
Nt Strtd	Issue: ISS requests logic in importing visa permits to CSS					X								
Nt Strtd	Issue: Summary GPA calculation import into CSS					X	X	X						
Nt Strtd	Issue: Creation of test score templates for Praxis2/licensure exams						X	X	X					
Nt Strtd	Issue: Automation of creation of secondary application for cert pgms								X	X	X			
Nt Strtd	Issue: Development of dashboard and funnel reports											X	X	X
	Test													
Nt Strtd	Testing		X	X	X	X	X	X	X	X	X	X	X	X
	Implement													
Nt Strtd	Continuous Communication & Training	X	X	X	X	X	X	X	X	X	X	X	X	★

Continued ...

Issues / Risks / Challenges

- Applications submitted in UAS may or may not have been imported into the OAR
- Keeping track of what is the current status of UAS-initiated applications

Modo – Phase 2 Enhancements

Project Status: **GREEN**

Monthly Summary – January 2, 2017

The project team continues to review the scope items for Phase 2 in order to determine the level of effort and time required to implement them. A demo was held with the Registration and Records team to review Modos integration capabilities with PeopleSoft. BGSU has a view only license to send select Reg & Records information to the mobile app. This demo generated a lot of questions that are being further researched.

Past Month's Key Accomplishments

- Conducted Modos PeopleSoft integration demo for Reg & Records.
- Met with Chris Bullins re OrgSync integration. Decision made to hold off on this feature. Did make OrgSync more visible on main website.
- Researched Directory filtering options. Will leave the directory as it is now using Modos module.
- Researched other phase 2 questions and opened cases with Modos as needed.

Upcoming Milestones

- Continue discussion with functional area regarding PeopleSoft view only integration.
- Discuss EAB/SSC/Advisor appointment scheduling with functional areas on 1/9.

Project Milestones

Status	Week Beginning (Sunday Date)	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Initialize															
On Trk	Project Planning	X	X	X	X	X									
Analyze, Design, & Development															
On Trk	Determine Requirements	X	X	X											
On Trk	Develop Design				X	X	X	X							
Nt Strtd	Perform Internal Development							X	X	X					
On Trk	Build Content						X	X	X	X					
Test															
Nt Strtd	Functional Owner Testing of Content									X	X	X	X	X	
Nt Strtd	Issue Resolution								X	X	X	X	X		
Implement															
Nt Strtd	Perform Communications													X	X
Nt Strtd	Deploy to Production														X

Bookstore Campus Integration

Project Status:

RED

Monthly Summary – January 2, 2017

The University Bookstore has been in the process of negotiating a contract with a textbook vendor over the past few months. Due to vendor limitations, the University Bookstore and vendor agreed to end negotiations. Most of the technical development was completed by ITS and is in the process of being archived in the event it is needed in the future. Next steps were identified to continue using the current Bookstore setup for the next few semesters, which were largely left intact. Early in the project, Financial Aid Opt-In updates were rolled into this project's scope and the Bookstore will work with SFA/Bursar to determine if additional changes are required.

Past Month's Key Accomplishments

- Development archived
- Next steps for 'business as usual' identified/completed

Upcoming Milestones

- Project closure

Project Milestones

Status	Week Beginning (Sunday Date)	Sep-11	Sep-18	Sep-25	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	
Initialize																											
Cmplt	Project Planning	X	X																								
Cmplt	Project Kick-Off		X																								
Cmplt	Design Solution		X	X																							
Analyze, Design, & Development																											
On Hld	Single Sign On Development		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X						
Cmplt	PeopleSoft Development - Sending Data/Receiving Displaying Data to Students			X	X	X	X	X	X	X	X	X	X	X													
Cmplt	Manual Opt-In Process Updates							X	X	X	X	X	X	X													
Cmplt	Creation of Blackboard Audit Reports									X	X	X	X	X													
On Hld	Web App Programming Changes												X	X	X	X	X	X	X	X							
On Hld	MyBGSU Portal Web Updates													X	X	X	X	X	X								
Test																											
On Hld	SSO Testing							X	X	X										X	X	X	X				
On Hld	QNA Testing														X	X	X	X									
On Hld	PPD Testing																			X	X	X	X				
Implement																											
On Hld	Communication to Campus/Training																				X	X	X				
On Hld	Production Migration (3 Release Dates)													X							X			X			
On Hld	Faculty Adoptions																						X	X	X	X	
On Hld	Remove Two Semester's Worth of Bookstore Links/Functionality																										★

DocuSign eForm Enhancement

Monthly Summary – January 2, 2017

The DocuSign BGSU eForm Enhancement project’s objective is to provide additional user options and security measures to the electronic signature application, DocuSign. These customizations will increase online form electronic signature security, reduce risk to the University, and will create a better user experience for signers. This month, development has continued on the new functionality that would streamline the document signature process. Testing is expected to start the week of January 8th and will include Human Resources, the Graduate College, and Student Financial Aid.

Past Month’s Key Accomplishments

- Continued custom application development
- Prepared a test plan for functional testers

Upcoming Milestones

- Complete development
- Begin testing

Project Milestones

Status		Week Beginning (Sunday Date)	Jun-12	Jun-19	Jun-26	Jul-3	Jul-10	Jul-17	Jul-24	Jul-31	Aug-7	Aug-14	Aug-21	Aug-28	Sep-4	Sep-11	Sep-18	Sep-25	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26									
Week Number			5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42									
Initialize																																																	
Cmplt	Project Planning																																																
Cmplt	Project Kick-Off		X	X	X																																												
Analyze, Design, & Development																																																	
Cmplt	Finalize Technical Specs/Requirements			X	X	X	X																																										
Cmplt	DocuSign BGSU Customization						X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X														
On Trk	User Interface Enhancements																								X	X	X	X	X	X	X	X	X	X	X	X													
Test																																																	
Nt Strtd	Testing - Round 1																																																
Nt Strtd	Defect Resolution																																																
Nt Strtd	Testing - Round 2																																																
Nt Strtd	Develop Training																																																
Implement																																																	
Nt Strtd	Go-Live																																																

Create Electronic Meal Plan Change Form

Project Status: **GREEN**

Monthly Summary – January 2, 2017

To provide flexibility to the student, a meal plan change request will be submitted with a web form that displays a student's current meal plan and other meal plans available to them. The DocuSign product will be used to manage the signature(s) and the status of each signature request. The list of signature requests will provide UDS a list of students to make the requested meal plan changes in Micros, BlackBoard Transact and Student Financials. The implementation is scheduled for 3/5/2017.

Past Month's Key Accomplishments

- Scheduled a DocuSign demonstration with the Project Team and resources from the ITS Auxiliary System Team
- Received functional spec approval from the Project Team
- Scheduled the ITS technical resources
- Demonstrate the web form functionality to the Project Team
- Created the functional spec document and sent to developers

Upcoming Milestones

- Monitor development progress
- Demonstrate web page and electronic signature functionality to the Project Team as each module is ready

Project Milestones

Status	Week Beginning (Sunday Date)	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	
Initialize																			
Cmplt	Project Planning	X	X																
On Trk	Design Solution		X	X	X	X	X	X											
Cmplt	Project Kick-Off		X																
Analyze, Design, & Development																			
On Trk	Finalize Technical Specs/Requirements					X	X	X	X										
On Trk	Web Page Development				X	X	X	X	X	X	X	X							
Nt Strtd	DocuSign Configuration										X	X	X						
Nt Strtd	Unit Test											X	X	X					
Nt Strtd	UAT Migration/Configuration														X				
Test																			
Nt Strtd	Testing/Defect Resolution														X	X	X		
Nt Strtd	Security Testing Migration/Configuration																	X	
Nt Strtd	Testing/Defect Resolution																	X	
Implement																			
Nt Strtd	Communication to Campus/Training															X	X		
Nt Strtd	Production Configuration																	X	
Nt Strtd	Production Migration																		X
Nt Strtd	Execute New Process																		★

Automate FRD Matriculation

Monthly Summary – January 2, 2017

Create a PeopleSoft process to select incoming Freshmen for automatic matriculation based on their SOAR appointment dates. The process will reference a custom setup table for SOAR appointment dates, select all students within the specified date range and create a matriculation row on the Admissions Application Program stack. The delivered PeopleSoft matriculation process will then select those new rows and create a corresponding row on the records side of the system to indicate the students are ready for term enrollment. The dates for development, configuration and testing are indicated on the project schedule. Implementation is scheduled for 3/5/2017.

Past Month's Key Accomplishments

- DEV testing is on schedule; selection criteria has been verified
- Test data was configured with help from the functional user
- Security role is being defined
- Component Interface design for Matriculation row complete

Upcoming Milestones

- QNA Testing scheduled for the second week of January thru the middle of February
- PPD Testing scheduled for the end of February
- Project on track for 3/5/17 Production Migration

Project Milestones

Status	Week Beginning (Sunday Date)	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	Mar-5	
Week Number		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	
Initialize																									
Cmplt	Project Planning	X	X																						
Cmplt	Design Solution		X																						
Cmplt	Project Kick-Off		X																						
Analyze, Design, & Development																									
Cmplt	Finalize Technical Specs/Requirements		X	X	X	X	X	X	X	X	X														
Cmplt	Define Setup Table (DEV)		X	X	X	X	X	X	X	X															
On Trk	Application Engine Development				X	X	X	X	X	X	X	X	X	X	X										
On Trk	Setup Row Level and T/L Security (DEV)						X	X	X	X	X	X	X	X	X										
On Trk	Unit Test (DEV)						X	X	X	X	X	X	X	X	X										
Nt Strtd	QNA Migration/Configuration															X									
Test																									
Nt Strtd	Testing/Defect Resolution (QNA)															X	X	X	X	X	X	X			
Nt Strtd	PPD Migration/Configuration																						X		
Nt Strtd	Testing/Defect Resolution (PPD)																						X	X	
Implement																									
Nt Strtd	Communication to Campus/Training																						X	X	
Nt Strtd	Production Configuration																							X	
Nt Strtd	Production Migration																							X	
Nt Strtd	Execute New Process																								★

Implement Avalon Multimedia System

Project Status: **GREEN**

Monthly Summary – January 2, 2017

Avalon is an open source multimedia warehouse solution BGSU will utilize to provide affiliates with streaming content. Once in place, the Avalon system will take the place of WBGU's DVSS video streaming service and the Music Library's Variations. As an open source product, the onus of infrastructure design and support will be almost entirely the responsibility of the ITS team. Functional leads from the Library and WBGU will serve as content managers. DEV and TEST environments will be utilized to gain experience before the production system is made available for content load in June 2017.

Past Month's Key Accomplishments

- Initialization: Project kickoff complete
- Development: Functional configuration for Variations identified
- Development: DEV and TEST environment builds underway

Upcoming Milestones

- 1/20/17: TEST infrastructure installed
- 1/31/17: DEV environment available

Project Milestones

Status	Week Beginning (Sunday Date)	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	Mar-5	Mar-12	Mar-19	Mar-26	Apr-2	Apr-9	Apr-16	Apr-23	Apr-30	May-7	May-14	May-21	May-28	Jun-4	Jun-11		
	Week Number	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37		
Initialization and Design																																						
Cmplt	Product and Technical Research	X	X	X																																		
Cmplt	Define and Collect Requirements			X	X	X																																
Cmplt	Project Kickoff				X																																	
Cmplt	Project Planning				X	X	X																															
Development and Testing																																						
On Trk	Install and Configure DEV Virtual Environment						X	X	X	X	X	X	X	X	X	X																						
Nt Strtd	ITS Unit Testing in DEV																X	X	X																			
On Trk	Build and Configure TEST Environment												X	X	X	X																						
Nt Strtd	User Acceptance Testing in TEST																X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X			
Implementation																																						
On Trk	Verify Spring Semester Functionality for Variations						X	X	X	X	X	X	X	X																								
Nt Strtd	Build and Configure PROD Environment																	X	X	X	X	X	X															
Nt Strtd	PROD Environment Validation																															X	X	X				
Nt Strtd	PROD Hand-off and Go-Live																																			*		
Nt Strtd	Variations Deprecation																																			X	X	

FMS 9.2 Upgrade Project

Project Status: **GREEN**

Monthly Summary – January 2, 2017

The fit-gap sessions are completed and the final scope document was approved by the Functional owners. The project team is now ready to finalize configuration in DEV and prepare for QNA testing to begin in mid-January. There is a potential for the project to be behind schedule with our conversion of Crystal Reports to BI Publisher. The resource we secured for the development tasks quit before the project started. We have secured another resource and work will begin soon. The overall project is on target and trending green.

Past Month's Key Accomplishments

- **Environment:** QNA database is built; QNA infrastructure built but not fully configured.
- **Development:** Completed voucher entry customization for ACH voucher processing; workcenter development; continue work on spreadsheet uploads; started config documentation; pivot grids; email functionality setup
- **Fit – Gap:** Completed fit-gap sessions; Scope document was reviewed and approved.
- **Testing:** Creating testing sequence strategy.

Upcoming Milestones

- Continue to create configuration documentation.
- Continue with dashboards and workcenter creation.
- Install and test Elastic.
- Continue to develop testing plans.
- Secure a Crystal to BI Publisher resource.

		Project Milestones																																						
Status	Week Beginning (Sunday Date)	Jul-10	Jul-17	Jul-24	Jul-31	Aug-7	Aug-14	Aug-21	Aug-28	Sep-4	Sep-11	Sep-18	Sep-25	Oct-2	Oct-9	Oct-16	Oct-23	Oct-30	Nov-6	Nov-13	Nov-20	Nov-27	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	Mar-5	Mar-12			
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36			
Initialize																																								
Cmplt	Project Planning and Startup	X	X																																					
Cmplt	Project Kick-Off													X																										
Environment Builds																																								
Cmplt	DMO Server / Environment Build			X	X	X	X	X	X	X	X	X	X																											
Cmplt	DEV Server / Environment Build										X	X	X	X	X	X	X	X	X	X																				
On Trk	QNA Server / Environment Build																									X	X	X	X											
Nk Strtd	PPD Server / Environment Build																																					X	X	
Nk Strtd	PROD Server / Environment Build																																							
Analyze, Design, & Development																																								
Cmplt	Business Process Mapping													X	X	X	X	X																						
Cmplt	Fit/Gap Sessions																																							
On Trk	Document Design and Configuration																						X	X	X	X	X	X	X	X										
On Trk	Perform Development																						X	X	X	X	X	X	X	X										
Test																																								
Nk Strtd	Systems Testing																																							
Nk Strtd	Integration Testing																																							
Nk Strtd	PPD Testing																																							
Nk Strtd	Mock Testing																																							
Implement																																								
Nk Strtd	Communication to Campus/Training																																							
Nk Strtd	Training (if needed)																																							
Nk Strtd	Go-Live																																							

Modifications to Contract Pay Status

Project Status: **GREEN**

Monthly Summary – January 2, 2016

The Modifications to Contract Pay Status project's objective is to create a method for HR and Payroll to adjust faculty member's contracts outside of the delivered functionality built into PeopleSoft. The solution was designed and development has been completed a month early. A test plan has been created and user testing by HR and Payroll will begin this week.

Past Month's Key Accomplishments

- Solution designed
- Development completed

Upcoming Milestones

- Project documentation
- Payroll and HR testing

Project Milestones

Status	Week Beginning (Sunday Date)	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	Mar-5	Mar-12	Mar-19	Mar-26	Apr-2	Apr-9	Apr-16	Apr-23	Apr-30	
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	
Initialize																								
Cmplt	Project Planning	X																						
Cmplt	Project Kick-Off	X																						
Cmplt	Design Solution		X	X	X																			
Analyze, Design, & Development																								
Cmplt	Development of Custom Page		X	X	X	X	X	X	X	X														
Cmplt	Development of People Code and Messaging		X	X	X	X	X	X	X	X														
Cmplt	Development of Security Specs									X	X													
On Trk	Project Documentation											X												
Test																								
Nt Strtd	Testing Round 1 (QNA)												X	X	X									
Nt Strtd	Defect Resolution (QNA)														X	X								
Nt Strtd	Testing Round 2 (QNA)																X	X	X					
Nt Strtd	Testing (PPD)																			X	X	X		
Implement																								
Nt Strtd	Production Migration																							★

RFP for Electronic Transcripts Vendor

Monthly Summary – January 2, 2017

The Registrar's office desires to implement an electronic transcript solution for BGSU. This past month the RFP project team met to determine the solution needs, draft an RFP document and, draft the below RFP timeline. The draft RFP document has been created and is in review. Once approved, the project team will work with Purchasing to release the RFP for the formal bid process.

Past Month's Key Accomplishments

- Initial meeting to plan-out RFP timeline
- RFP document draft

Upcoming Milestones

- Finalize RFP document
- Work with Purchasing to release RFP

Upcoming Events

- None

Project Milestones

Status	Week Beginning (Sunday Date)	Dec-4	Dec-11	Dec-18	Dec-25	Jan-1	Jan-8	Jan-15	Jan-22	Jan-29	Feb-5	Feb-12	Feb-19	Feb-26	Mar-5	Mar-12	Mar-19	Mar-26	Apr-2
	Week Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
	Initialize																		
Cmplt	Project Planning	X	X																
Cmplt	Project Kick-Off		X																
On Trk	Request for Information Documentation		X			X	X												
Nt Strtd	Issue RFP open to Bid							X	X	X	X								
Nt Strtd	RFP Evaluation										X	X	X	X					
Nt Strtd	Vendor Presentations											X	X	X					
Nt Strtd	Vendor Selection												X						
Nt Strtd	Formalize Prices												X	X	X	X			
Nt Strtd	Formalize Contract												X	X	X	X			
Nt Strtd	Legal Services Review														X	X	X	X	
Nt Strtd	Execute Contract																	X	★