

FACULTY INFORMATION SYSTEM IMPLEMENTATION PLAN

Plan for the implementation of a secure, web-based, university-wide platform of integrated data on faculty for generating actionable metrics for strategic planning, reporting, and establishing a hub for internal and external collaboration.

April, 2018

GOALS AND OBJECTIVES

The main goal of this project is to utilize the existing School of Medicine faculty information system structure to build an expanded customized platform that will serve as the master record of data about all full- and part-time faculty activity and characteristics at CWRU. The following will be included in the system:

- Rank and tenure information
- Degrees earned
- Appointment and compensation history
- Instructional assignments
- Other appointments (administrative, secondary, professorships, etc.)
- Academic assignments (professional activities, scholarship, public and university service)
- Committee participation
- Demographic information (gender, race/ethnicity, citizenship, campus location, email address, etc.)
- Unit/school-level role and object-based access and security for all administrative workflow events
- Integration with SIS, HCM, SPARTA, and other external data providers needed to populate/complete the faculty member record.
- Approval workflows for individual events, and batch transactions, all based on role.

The project will require a minimum of the following resources:

Project Manager	Architect	Trainer / Technical Writer
Business Analyst	Designer / Developer(s)	Records Coordinator

The FIS implementation consists of three planned phases. Each phase will proceed using an “agile” development approach where requirements are deployed in releases. This approach aligns development processes with stakeholder expectations and goals. Other benefits of agile development include:

- ✓ Transparency
- ✓ Early and Predictable Delivery
- ✓ Predictable Costs and Schedule
- ✓ Flexibility
- ✓ Improved Quality



Phase I: Expand the School of Medicine’s FIS platform to create an enterprise-wide solution. Release 1 (targeted for fall 2018) will incorporate the following functionality:

- Basic search
- View records
- Simple report generation

Additional releases are planned for Phase I, with specific functionality to be determined.

Phase II: Fill in missing administrative components (e.g., workflows, recruiting and hiring, auditing, etc.)

Phase III: Enhance the Faculty Activity Reporting and collaboration components

This software will meet or exceed university software standards and additional requirements established in the initiative charter, and make the end user's interaction with the FIS as simple and efficient as possible for accomplishing each task. The scope of this project also includes completion of all documentation, manuals, and training aids to be used in conjunction with the system.

PHASE I: RELEASE 1

Phase I implementation began in July of 2017, and focuses on providing search, view, and simple report generation access based on existing faculty data migrated from the Provost's Office and School of Medicine databases. This process consists of the following:

- System requirements and business process validation
- System design and testing
- Training and documentation

RELEASE 1 - MILESTONE TARGET COMPLETION TABLE

Milestone	Description	Begin	End
Initiate and Launch	High-level activities surrounding requirements gathering, process mapping, system source identification. All requirements are documented to ensure the future application reflects those requirements and meets FLI specifications.	07/2017	03/2018
System Plan / Design	This is the theoretical design for the system and its functionality, and determines how the system will meet all specified requirements.	08/2017	03/2018
System Development	The actual construction phase of the FIS.	03/2018	Ongoing
Development Testing	All functionality tested and all identified errors corrected	04/2018	Ongoing
End User Testing	End users evaluate whether the system has complied with all of the outlined requirements and to see that it meets Quality Standards.	Summer 2018	Ongoing
Training and Documentation	Define the needs, design and layout, content of the training, schedule, and end-user documentation materials	Fall 2018	TBD
Release 1 Deployment	The system is ready to be deployed and accessible to end users	Fall 2018	TBD
Institute Communications	Launch campus-wide communications regarding the FIS implementation	Fall 2018	Ongoing

MILESTONES

1) Initiate and Launch

- Submit Project Initiation Form to initiate UTECH process
- Obtain funding approval for implementation
- Validate business requirements and business process flows
- Identify and engage key stakeholders

2) System Plan / Design

- Identify specific designs, databases and workflows related to the FIS
- Determine system data model
- Identify what tools and software will be used to create the application
- Outline system roles
- Identify integration requirements
- Develop the Entity Relationship Diagram
- Build the database

3) System Development

- Integrate into AWS Cloud
- Data map and import existing data
 - Provost Database and School of Medicine current system
- Resolve multi-data source conflicts/duplicates
- Integrate with data sources
 - Faculty Information Sources - Sparta (Grants), HCM (Demographics, Visa, Address, etc.), SIS (Courses)
 - Publication Sources (PubMed, Scopus, etc.)
- User Experience / User Interface Development
 - Development of the process and/or information flow of the system
 - Create a prototype of the developed design
 - Conduct a usability inspection of the prototype to evaluate the design
 - Design the final graphical user interface based on the outcomes of the prototype evaluation and testing

4) Testing

- Develop a test plan strategy
- Develop test cases and scripts
- Perform system and load tests
- Utilize the FIS Review Board in usability testing to evaluate the experience
- Conduct user feedback sessions with faculty to evaluate the prototype design
- Design the final graphical user interface based on the outcomes of the prototype evaluation and testing

5) Training and Documentation

- Develop a training schedule for each functional and technical area and make sure it is published in the community.
- Test training materials for accuracy.
- Test training database to ensure it is working and includes all customizations.
- Train instructors so they are comfortable with the material and the training database.
- Make sure instructors have a script to run all processes.
- Produce accurate numbers of training documents and materials.
- Deliver training to the end users.
- Create additional training as necessary based on the needs and feedback received while training is in progress.
- Design and develop an end-user training manual that provides functional and technical system support information and includes navigation paths and report generation assistance.

6) Phase I Deployment

The system is ready to be deployed and accessible to end users when institutional test environments and testing practices are concluded, and the following has occurred:

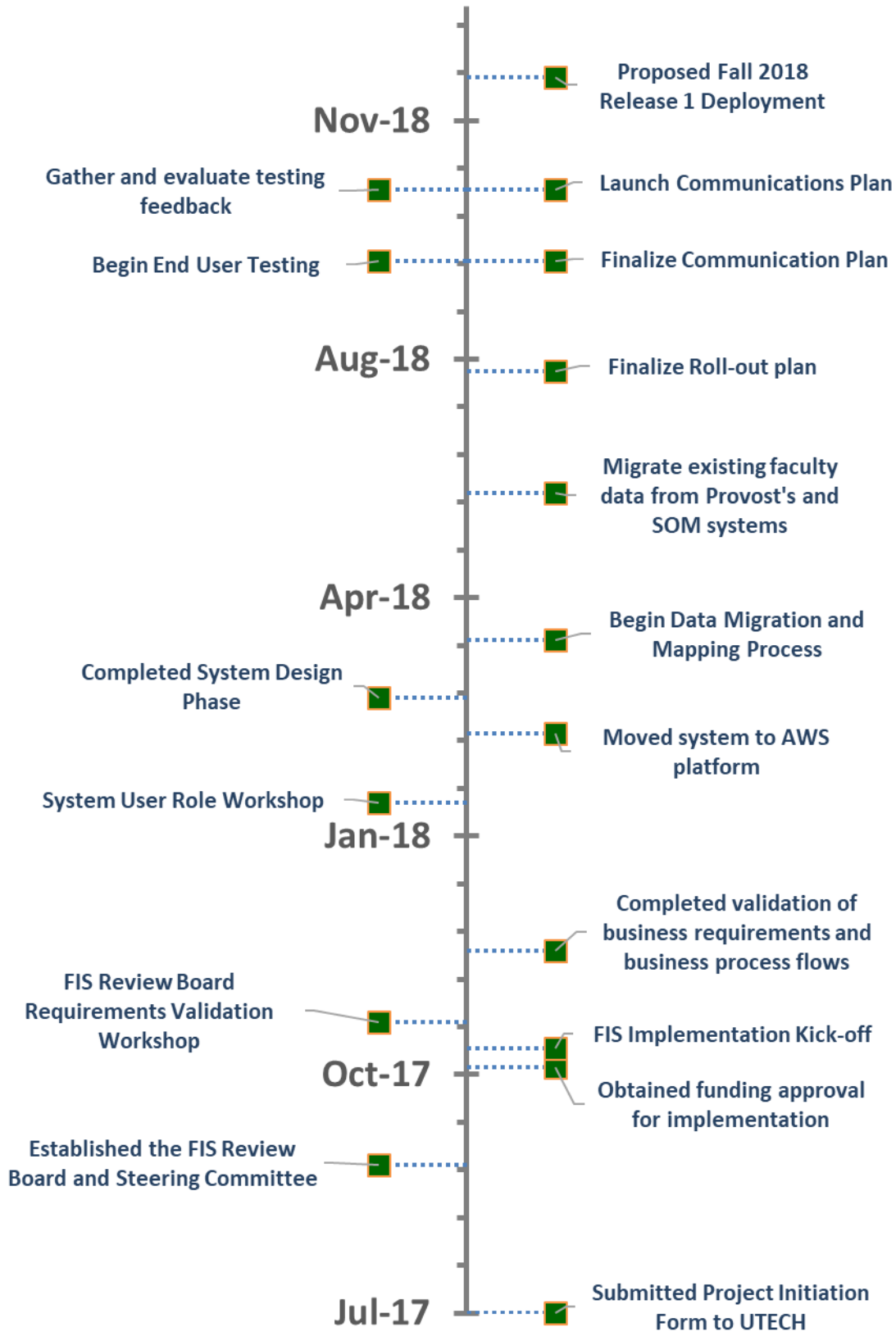
- Develop a rollout plan
- Accomplish production release activities
- Complete end user training
- Adopt Faculty Lifecycle Initiative Data Principles

7) Communications

A communications plan will be instituted in fall 2018 and will guide communications throughout the life of the implementation. The plan will be updated as communication requirements change. The plan will include the following:

- FIS project team members' roles and responsibilities as they pertain to communications
- A communications matrix which maps the communication requirements of this project
- A project team directory of contact information for all stakeholders directly involved in the project
- An FIS Implementation website

Release 1 Timeline: Basic System View



IMPLEMENTATION LEADERSHIP

The FIS Project Leadership Team manages the project scope, strategies and plan, resource allocations, and budgets, supports the vision and goals of the project, provides guidance for policy issues that arise, and communicates information related to the project to the CWRU community. Members include:

Leslie Czeck, Project Director, [U]TECH

Jean Gubbins, Director, Institutional Research

Anita Gupta, Application Developer, School of Medicine, [U]TECH

Lois Langell, Special Assistant to the Provost

Nassif Nassif, Applications Architect, [U]TECH

David Pilasky, Assistant Dean for Information Technology - School of Medicine, [U]TECH

Lynice Willis, Program Manager, Planning and Institutional Research

FIS Steering Committee - Members serve as ambassadors and advocates for the FIS with school and university-level end-users and other stakeholders, encourage the development of a governance framework for the FIS platform, and provide “wise counsel” on system implementation issues related to the application platform, integration, or technology support. The initial steering committee meeting was held on March 12, 2018. Members include:

FIS Project leadership team members listed above

Stephanie Endy, Associate Vice President for Research

Amy Hammett, University Registrar and Director of Student Information Systems and Services

Arnold Hirshon, Associate Provost and University Librarian

James Ryan, Human Resources Director

Faculty representative, to be named

FIS Review Board - composed of key individuals from the schools and departments within the university, these individuals will act as subject matter experts as well as project champions for their relevant schools/ departments. Members include:

Kathy Beal, Metrohealth Medical Center, School of Medicine

Donna Davis Reddix, Faculty Diversity Officer, Office for Inclusion, Diversity and Equal Opportunity

Sheryl Dugard, Manager, Academic Administration, Case School of Engineering

Jean Farah, Executive Aide to the Dean, School of Dental Medicine

Cynthia Hill-Graham, Academic Deans' Office, School of Law

Cena Hilliard, Assistant Dean, Case School of Engineering

Timerra Jung, Manager of Facilities and Administration, School of Law

Christine Kehoe, Administrator, Department of Pathology, School of Medicine

Maureen Kendel, Assistant to the Dean for Special Projects and Faculty Administration, Frances Payne Bolton School of Nursing

Cheryl Lauderdale, Executive Aide to the Deans, School of Law

Ana Merdita, Executive Aide to the Dean, Weatherhead School of Management

Meagan Rodgers, Manager, Operations and Strategic Initiatives, College of Arts and Sciences

Michelle Shaylor, Faculty Affairs Administrator, School of Medicine

Angelica Szakacs, Academic Team Leader, Case School of Engineering

Doreen Thibodeau, Executive Aide, Office of Student Affairs

Patricia Urbon, Director, Faculty Affairs, School of Medicine

Molly Watkins, Executive Director of International Affairs

Zoe Breen Wood, Assistant Professor, Mandel School of Applied Social Sciences (Faculty Representative)

Roger Zender, Associate Director, Creation and Curation Services, Kelvin Smith Library

MSASS, TBD