



FACULTY INFORMATION SYSTEM ROLLOUT PLAN

Plan for the rollout of the Faculty Information System (FIS) a secure, web-based, university-wide platform of integrated data on faculty.

August, 2018

INTRODUCTION

This document covers the rollout of the Faculty Information System (FIS) a platform that will serve as the master record of data about all full- and part-time faculty activity and characteristics at CWRU. This implementation consists of three planned phases and will proceed using an “agile” development approach where requirements are deployed in releases.

Phase I: Release 1

This release focuses on providing search, view, and simple report generation access based on existing faculty data migrated from the Provost’s Office database. No “Add/Edit” functionality is included with this release.

Release 1 rollout will be available to deans and faculty affairs administrators of the schools the end of November 2018. Upon successful completion of this preliminary rollout, we will release access to the system by role level. Testing will continue for all additional releases.

Phase II: Fill in missing administrative components

- Appointment letter templates and document management workflows
- Integrations (e.g., OnBase, SIS, HCM, Sparta, and PubMed)
- Workflows, auditing, and alerts
- Faculty activity reporting, and elections

Phase III: Enhance the Faculty Activity Reporting and collaboration components

- Advanced ad-hoc query capability
- Profiles
- Integration with other data sources (e.g., Digital Measures)
- Collaboration portal

The proposed released dates for the information that follows are the development teams’ best estimates at this time.

ROLES AND RESPONSIBILITIES *(Subject to change)*

Access Level	Role	Role Definition	Rollout Phase	Responsibilities
UNIVERSITY	Provost Office	Universal access for Provost, Deputy Provost or other provost designee	Phase I - Release 1	Implementation oversight
	Provost Office Special Assistant	University level faculty affairs administrator	Phase I - Release 1	Implementation oversight
	FIS Data Administrator	Universal access to faculty information for all schools; data management and analysis; system governance	Phase I - Release 1	Implementation and system oversight
	Finance Officer	Individuals responsible for the administration of budgets and financial information at the university level	Phase 2	End-users
	H.R. Administrator	Central HR Office and OIDEO staff involved in processing faculty information	Phase 1 - Release 1	End-users
SCHOOL	Dean	Dean or dean-designee	Phase 1 - Release 1	End-users
	Faculty Affairs Administrator	Manages the appointment, promotion and tenure processes; handles FIS role assignments for the school	Phase 1 - Release 1	End-users
	Business/ Finance Officer	Individuals responsible for the administration of budgets and financial information in a specific school/unit; may also be H.R. Officer role.	Phase 1 - Release 1	End-users
FACULTY	Faculty Member	Board-appointed and special faculty	Phase 2	End-users
DEPARTMENT	Department Chair	Academic leader responsible for the administration of faculty-related information in a specific department/unit	Phase 2	End-users
	Department Administrator	Staff in academic department who execute business processes related to faculty information at the unit level	Phase 2	End-users
DIVISION	Division Chief	Academic leader responsible for the administration of faculty-related information at the division level	Phase 2	End-users
	Division Administrator	Staff in school divisions who execute business processes related to faculty information at the division level	Phase 2	End-users
[U]TECH	[U]Tech Administrator	Staff responsible for developing and maintaining the Faculty Information System environment	Phase 1 - Release 1	System oversight
	FIS User Support	[U]Tech staff responsible for end user support of the Faculty Information System	Phase 1 - Release 1	System oversight
OTHER	CAPT Member (Internal)	Temporary access for members of APT (appointment, promotion, tenure) committees	Phase 2	End-users
	Guest (External)	External individuals granted temporary access for specific function, such as reviewers for promotion and tenure process	Phase 2	End-users
PUBLIC	Public	Access to public information through internet profile or collaboration portal	Phase 3	End-users

ROLLOUT SCHEDULE

Functionality	Role-level Access										Proposed Release
	PROVOST	DEAN	FACULTY	DEPT CHAIRS/ DIV CHIEFS	FACULTY AFFAIRS	BUSINESS/ FINANCE OFFICER	DIV/ DEPT/ UGEN ADMINS	FIS DATA ADMIN	[U]Tech	PUBLIC	
Phase 1											
Basic Search, View, Reporting	X	X			X	X	X	X	X		Nov-2018
Add / Edit	X	X		X	X	X		X	X		Dec-2018
Additional reporting options	X	X		X	X	X	X	X	X		Dec-2018
Phase II											
Templates, document management, and workflows	X	X		X	X	X	X	X	X		Mar-2019
OnBase and PubMed Integration								X	X		Jun-2019
Other internal system integrations (e.g., SIS, HCM, Sparta)								X	X		Nov-2019
Faculty activity reporting	X	X	X	X	X		X	X	X		Dec-2019
Faculty elections	X	X	X	X	X		X	X	X		Dec-2019
Phase III											
Advanced ad-hoc queries	X	X	X	X	X	X	X	X	X		Mar-2020
Profiles	X	X	X	X	X	X	X	X	X	X	Jun-2020
Integration with other data sources (e.g., Digital Measures)								X	X		Sep-2020
Collaboration portal	X	X	X	X	X	X	X	X	X	X	Dec-2020

MILESTONE TARGET COMPLETION TABLE

Milestone	Description	Begin	Proposed Launch
System Development	<p>The actual construction phase of the FIS to include:</p> <p>Data map and import existing data</p> <ul style="list-style-type: none"> - Provost Database and School of Medicine current system <p>Integrate with data sources</p> <ul style="list-style-type: none"> - Faculty Information Sources - Sparta (Grants), HCM (Demographics, Visa, Address, etc.), SIS (Courses) - Publication Sources (PubMed, Scopus, etc.) <p>User Experience / User Interface Development</p> <ul style="list-style-type: none"> - 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 	Mar-2018	Ongoing
Development Testing	<p>All functionality tested and all identified errors corrected to include:</p> <ul style="list-style-type: none"> - 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 	Apr-2018	Ongoing
Provost's Advisory Council presentation	Meet with the Provost's Advisory group to present the FIS rollout plan and demonstrate the Phase I functionality	Sep-2018	
Deans' Council presentation	Meet with the Deans to present the FIS rollout plan and demonstrate the Phase I functionality	Sep-2018	
Launch Communications	Launch campus-wide communications and the Faculty Lifecycle Initiative website, which includes FIS implementation information, after Deans' approvals are obtained	Sep-2018	
Training and Documentation	<p>Define the needs, design and layout, content of the training, schedule, and end-user documentation materials, as well as the following:</p> <ul style="list-style-type: none"> - Train instructors - Deliver training to the end users - Create additional training as necessary based on the needs and feedback received while training is in progress - Design, develop, and make available to the end-user a training manual that provides functional and technical system support information and includes navigation paths and report generation assistance 	Oct-2018	Ongoing

Milestone	Description	Begin	Proposed Launch
Kick Off Event for Phase I Release	Event to promote the upcoming launch of the FIS to School/Unit-level administrators, and to provide next-step information regarding their role in this stage of the implementation.	Nov-2018	
Phase I - Release 1 Deployment	Notification of Phase/Release 1 availability (basic search, view, and reporting)	Sep-2018	Nov-2018
Phase I - Release 2 Deployment	Notification of Phase/Release 2 availability (add/edit functionality and enhanced reporting)	Dec-2018	Jan-2019
Begin Phase II Development	Integrations with internal systems (e.g., OnBase, SIS, HCM, SPARTA)	Jan-2019	Dec-2019
Host Phase II School-level Road Shows	School-level presentations providing updates and next-step information regarding the FIS implementation.	Jan-2019	Ongoing
Appointment Letter Templates	Development of a set of standard (yet customizable) templates for use in generating appointment letters, CVs, and other documents	Jan-2019	Mar-2019
Faculty activity reporting	Develop the necessary activity reporting functionality to support this annual process	Jan-2019	Sep-2019
Faculty voting / elections	Develop the necessary election/voting functionality to support this process	Jan-2019	Jun-2019
Begin Phase III Development	Integrations with other data sources (e.g., Digital Measures) and development of the collaboration hub	Jan-2020	Dec-2020
Advanced reporting	Enhanced existing reporting capabilities with the addition of pivot functionality to support ad-hoc queries	Dec-2019	Mar-2020
Profiles	Develop the needed functionality to repurpose faculty data from the FIS to support and populate web pages and faculty profiles	Jan-2020	Jun-2020
Collaboration portal	Develop the needed functionality to repurpose FIS data to support a searchable portal of faculty information to facilitate mentoring, networking, and other collaborative opportunities among faculty, students, and external partners	Jul-2020	Dec-2020

IMPLEMENTATION LEADERSHIP

Faculty Lifecycle Initiative Executive Sponsors

Ben Vinson III, Provost and Executive Vice President

Sue B. Workman, Vice President University Technology and Chief Information Officer

Victoria Wright, Associate Vice President for University Planning and Administration

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 of Institutional Research, Planning and 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 E. 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:

Olivia Abdlrasul, Executive Aide to the Dean, Frances Payne Bolton School of Nursing

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

Valerie Robinson, Executive Aide to the Dean, Mandel School of Applied Social Sciences

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

Michelle Shaylor, Faculty Affairs Administrator, School of Medicine

Alexandra Snyder, Information Systems Analyst, Human Resources

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

FIS DEVELOPMENT TEAM MEMBERS

Project Design:

- Leslie Czeck, PMP, Project Director, University Technology, [U]Tech
- Trever Dodge, Business Analyst, University Technology, [U]Tech
- Jean Gubbins, Director Institutional Research, Planning and Institutional Research
- Anita Gupta, Application Developer, School of Medicine, University Technology, [U]Tech
- Miroslav Humer, Associate Vice President, Client Experience, University Technology, [U]Tech
- Nassif Nassif, Applications Architect, University Technology, [U]Tech
- David Pilasky, Assistant Dean for Information Technology, School of Medicine, University Technology, [U]Tech
- Lynice Willis, Program Manager, Planning and Institutional Research

Database Design:

- Anita Gupta, Application Developer, School of Medicine, University Technology, [U]Tech
- Nassif Nassif, Applications Architect, University Technology, [U]Tech
- Brian Rosen, Application Developer, University Technology, [U]Tech
- Lynice Willis, Program Manager, Planning and Institutional Research

Application Development:

- Anita Gupta, Application Developer, School of Medicine, University Technology, [U]Tech
- Nicholas Miller, Application Developer, School of Medicine, University Technology, [U]Tech
- Fei (Sophie) Shao, Application Developer, School of Medicine, University Technology, [U]Tech
- Brian Tome, Application Developer, School of Medicine, University Technology, [U]Tech
- Wei Wang, Application Developer, School of Medicine, University Technology, [U]Tech
- Drake Williams, Application Developer, School of Medicine, University Technology, [U]Tech

Network Development:

- Tom Ligman, Server and Database Administrator, School of Medicine, University Technology, [U]Tech

The product roadmap milestones and data are subject to change.

27.08.2018

