

How We Selected an ERP to Replace the Aging Mainframe

A key to the success of the LEAPForward Initiative is to ensure that proven standard and methods are followed. We have chosen to use the following methodologies:
LEAN
TOGAF
ITIL
PMI Project Management Methods
We will share what those are, how they were used, and how they will guide us through the Initiative Lifecycle



ITIL



PMI Project Life Cycle



TOGAF



LEAN

Methods

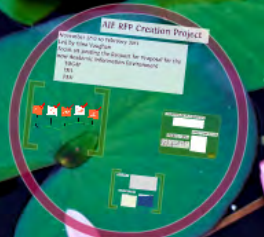
Project Usage



AIE Requirements Project

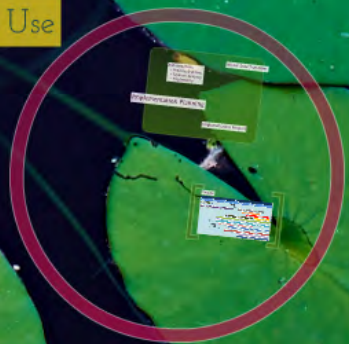


AIE RFP Evaluation



AIE RFP Creation Project

Future Use



How We Selected an ERP to Replace the Aging Mainframe

A key to the success of the LEAPforward Initiative is to ensure that proven standard and methods are followed.

We have chosen to use the following methodologies:

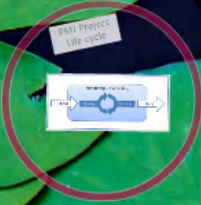
- LEAN
- TOGAF
- ITIL
- PMI Project Management Methods

We will share what these are, how they were used, and how they will guide us through the Initiative Lifecycle

Project Usage



ITIL



PMI Project Life cycle



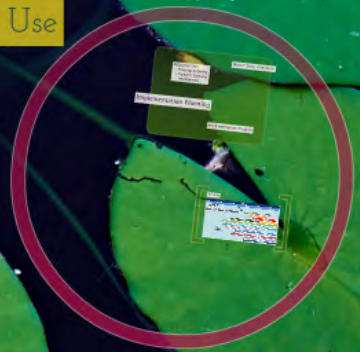
TOGAF

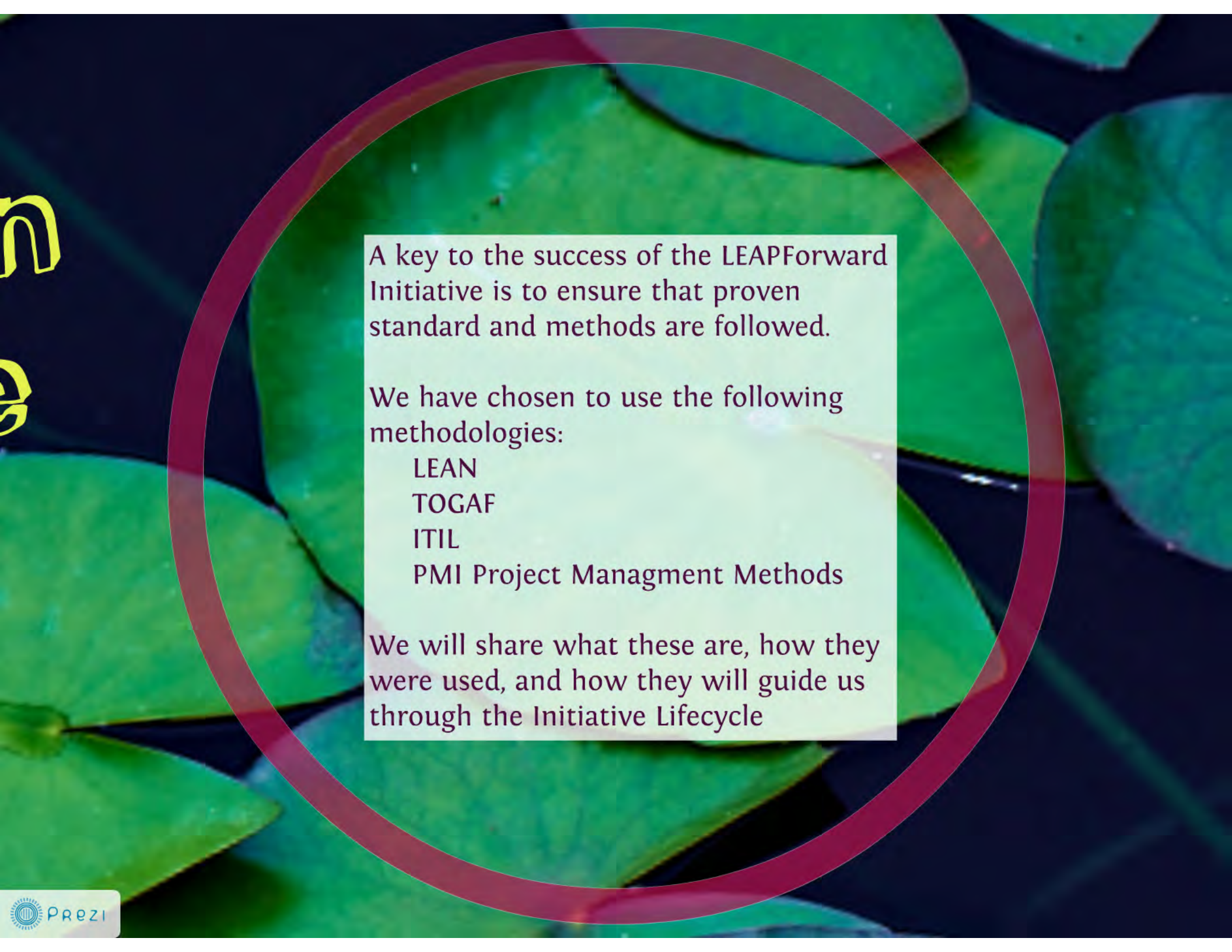


LEAN

Methods

Future Use





A key to the success of the LEAPForward Initiative is to ensure that proven standard and methods are followed.

We have chosen to use the following methodologies:

LEAN

TOGAF

ITIL

PMI Project Management Methods

We will share what these are, how they were used, and how they will guide us through the Initiative Lifecycle



ITIL

PMI Project Life cycle



TOGAF



LEAN

Methods

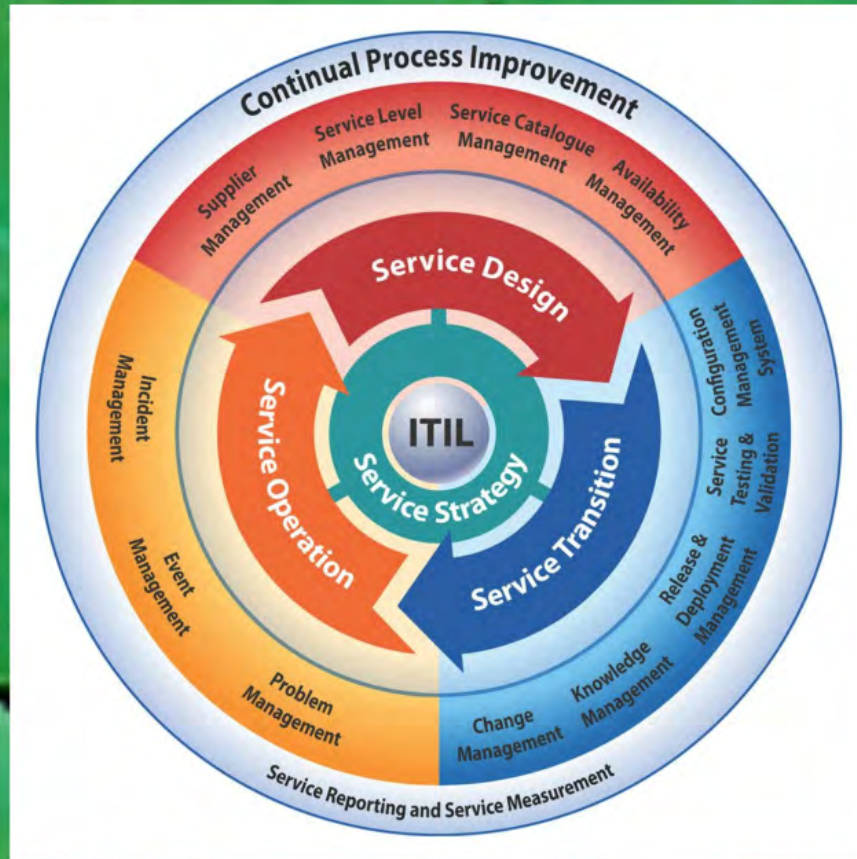


LEAN

TOGAF

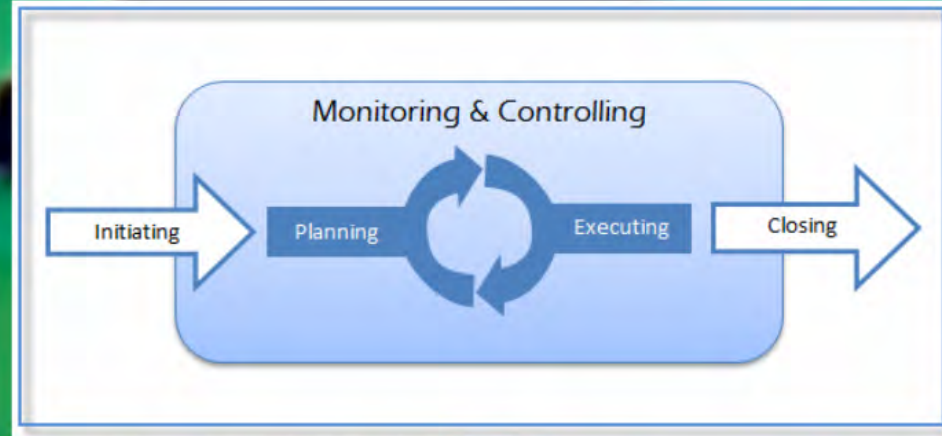


Image courtesy of The Open Group



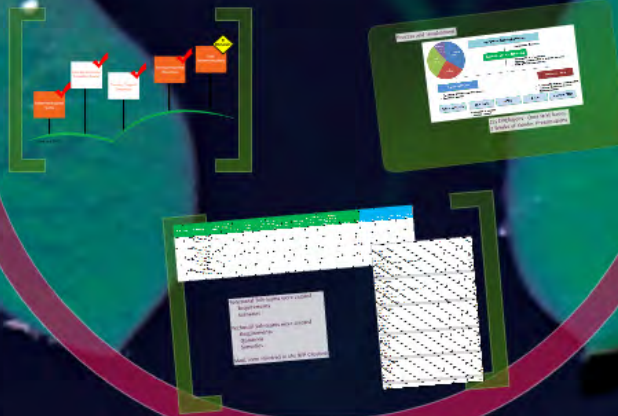
ITIL

PMI Project Life cycle



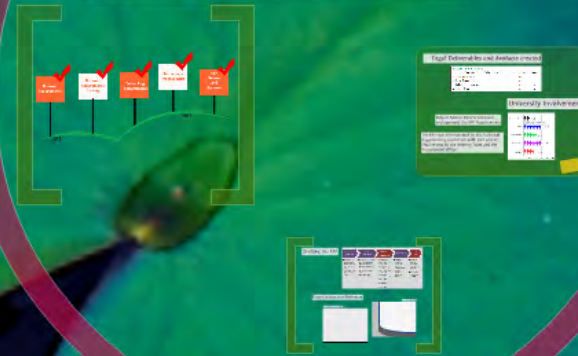
AIE RFP Evaluation

March 2013 to July 2013
Led by Dina Vaughan
Focus on evaluating and scoring the responses from the Vendors.
Central Evaluation Committee
TOGAF
ITIL
PMI



AIE RFP Creation Project

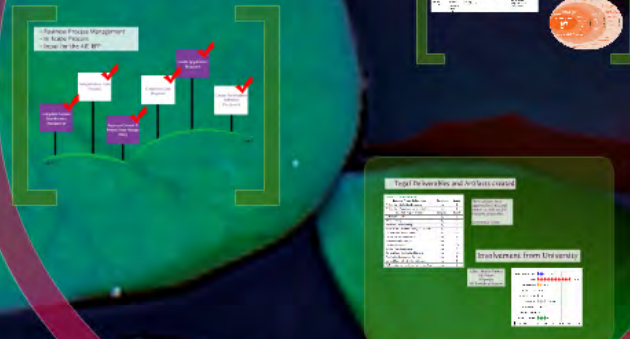
November 2012 to February 2013
Led by Dina Vaughan
Focus on posting the Request for Proposal for the new Academic Information Environment
TOGAF
ITIL
PMI



Project Usage

AIE Requirements Project

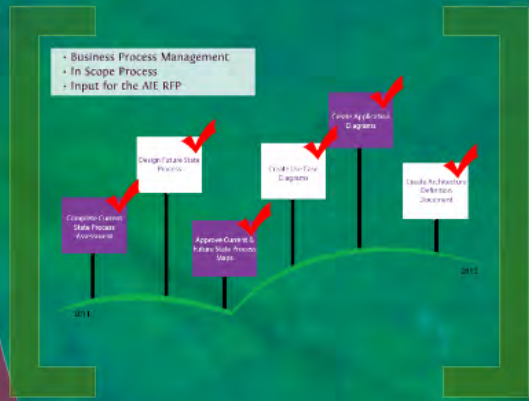
December 2011 to December 2012
Led by Pam Beach
Focus on Business Project Management
LEAN
TOGAF
PMI



Usage

AIE Requirements Project

December 2011 to December 2012
Led by Pam Beach
Focus on Business Project Management
LEAN
TOGAF
PMI



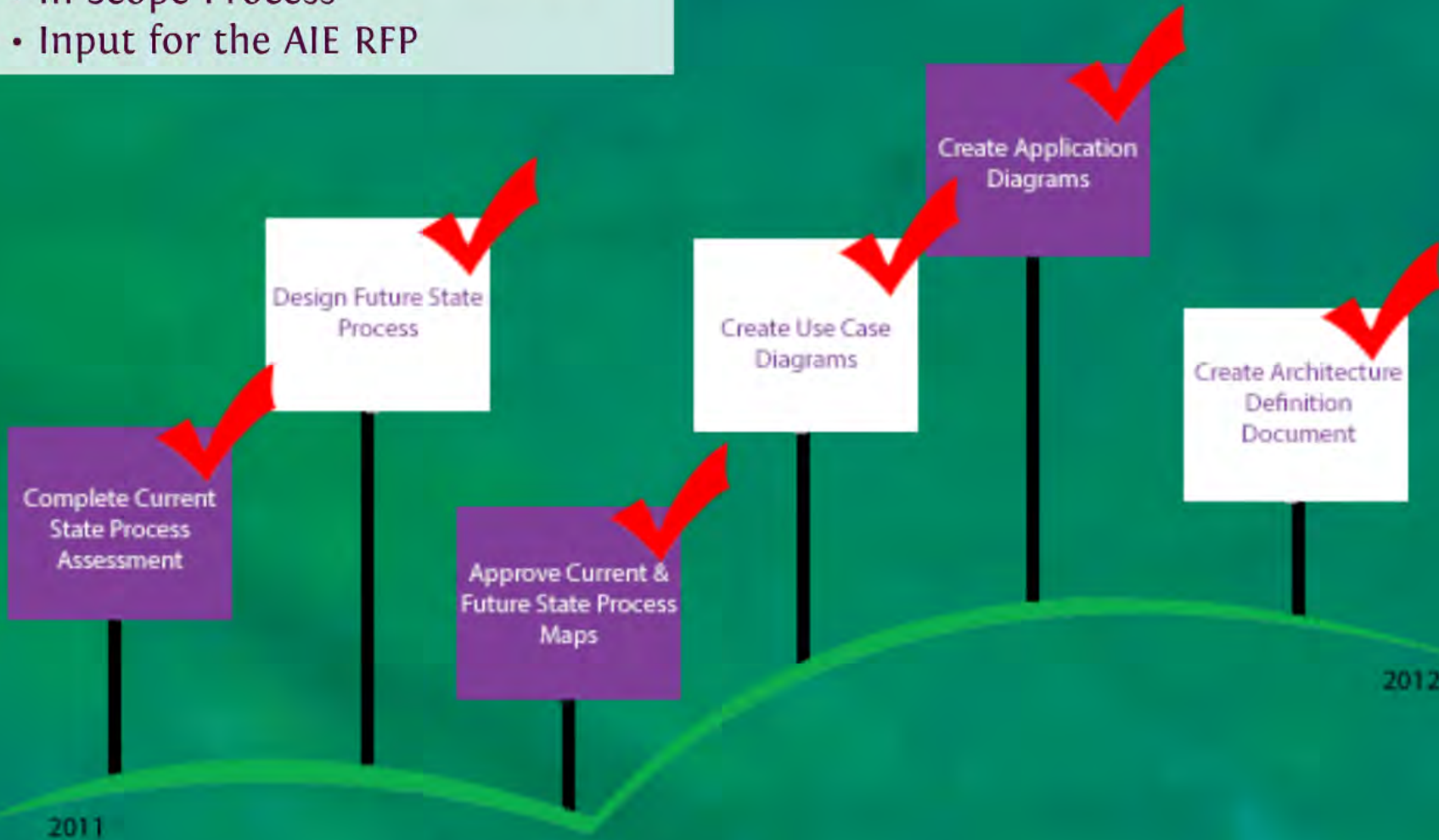
Togaf Deliverables and Artifacts created

Deliverable/Artifact	Created	Done
Final Business Strategy	2011	2012
Business Architecture	2011	2012
Information Systems Architectures	2011	2012
Technology Architecture	2011	2012
Business Process Models	2011	2012
Business Use Cases	2011	2012
Business Capabilities	2011	2012
Business Processes	2011	2012
Business Rules	2011	2012
Business Policies	2011	2012
Business Guidelines	2011	2012
Business Standards	2011	2012
Business Templates	2011	2012
Business Models	2011	2012
Business Frameworks	2011	2012
Business Reference Models	2011	2012
Business Best Practices	2011	2012
Business Lessons Learned	2011	2012

Involvement from University

University	Involvement
University of York	High
University of Leeds	Medium
University of Sheffield	Low
University of Nottingham	Very Low
University of Birmingham	None

- Business Process Management
- In Scope Process
- Input for the AIE RFP



Togaf Deliverables and Artifacts created

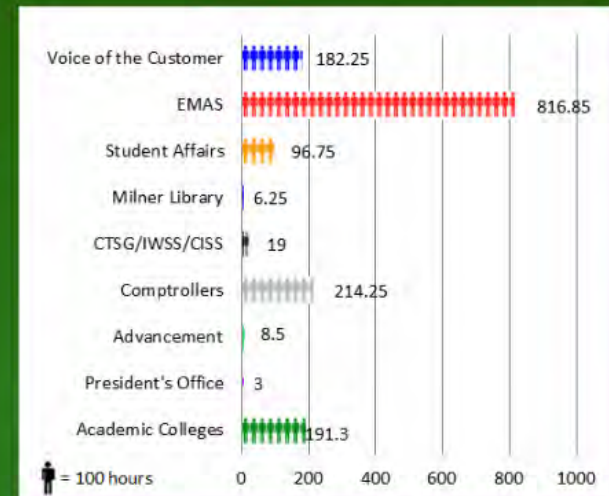
Project Deliverables:		
Expected Project Deliverables	Completed	Count
Architecture Definition Document	Yes	1
Architecture Requirements Specification	Yes	1
Expected Project Artifacts	Completed	Count
Stakeholder Matrix	Yes	1
Actor Catalog	Yes	1
Academic Driver Catalog	Yes	1
Voice of the Customer Survey and Analysis	Yes	1
Current State Process Maps	Yes	142
Future State Process Maps	Yes	54
Business Model Diagram	Yes	27
Use Case Diagram	Yes	78
Service Function Catalog	Yes	1
Current State Application Diagrams	Yes	35
Application Component Catalog	Yes	1
Current State Infrastructure Diagram	Yes	1
Platform Services and Technology Catalog	Yes	1

These artifacts were approved by functional owners as well as LEAP Initiative Leadership.

Governance is Key.

Involvement from University

Subject Matter Experts
1300 hours
281 people
266 Workshop Sessions



AIE RFP Creation Project

November 2012 to February 2013

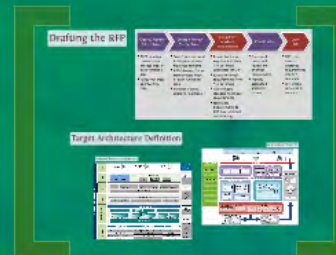
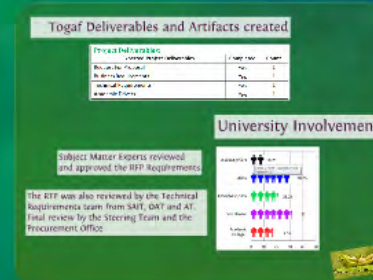
Led by Dina Vaughan

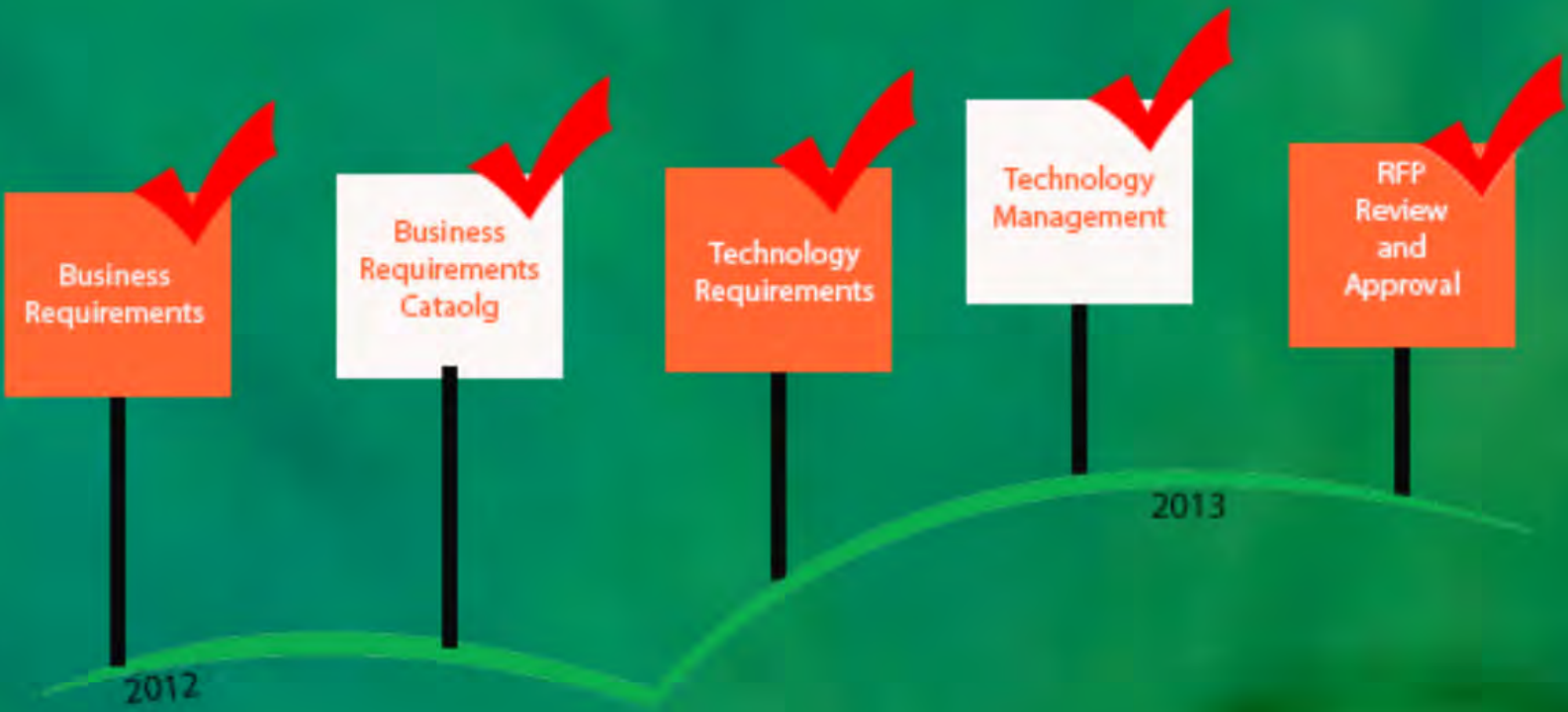
Focus on posting the Request for Proposal for the new Academic Information Environment

TOGAF

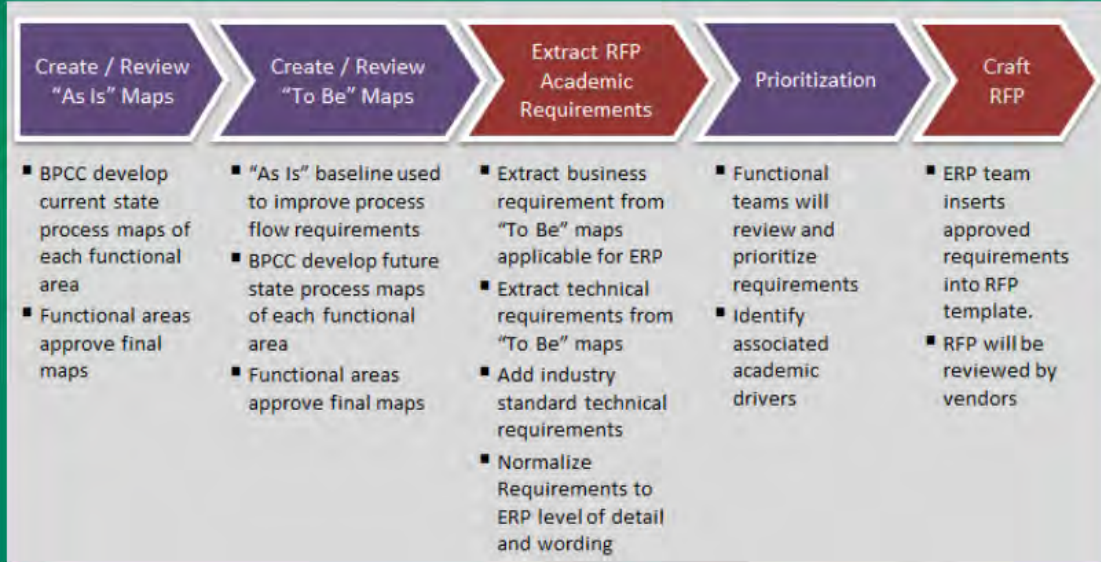
ITIL

PMI

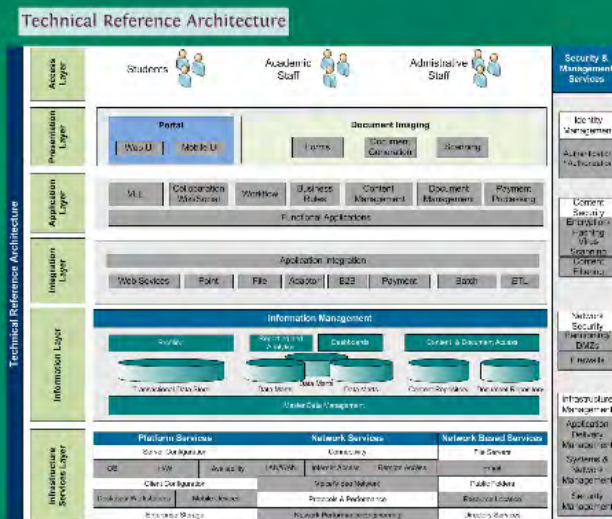




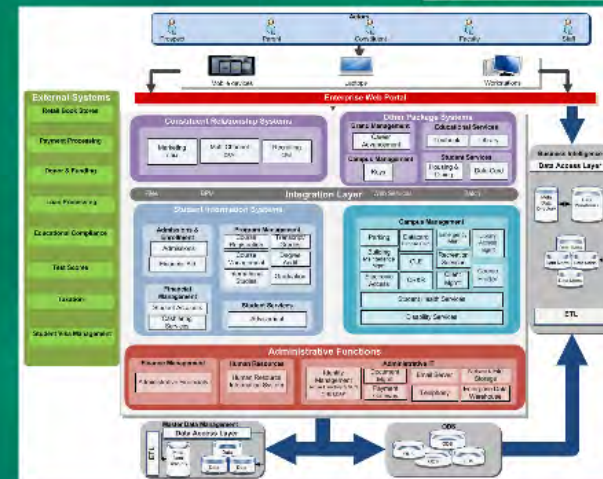
Drafting the RFP



Target Architecture Definition

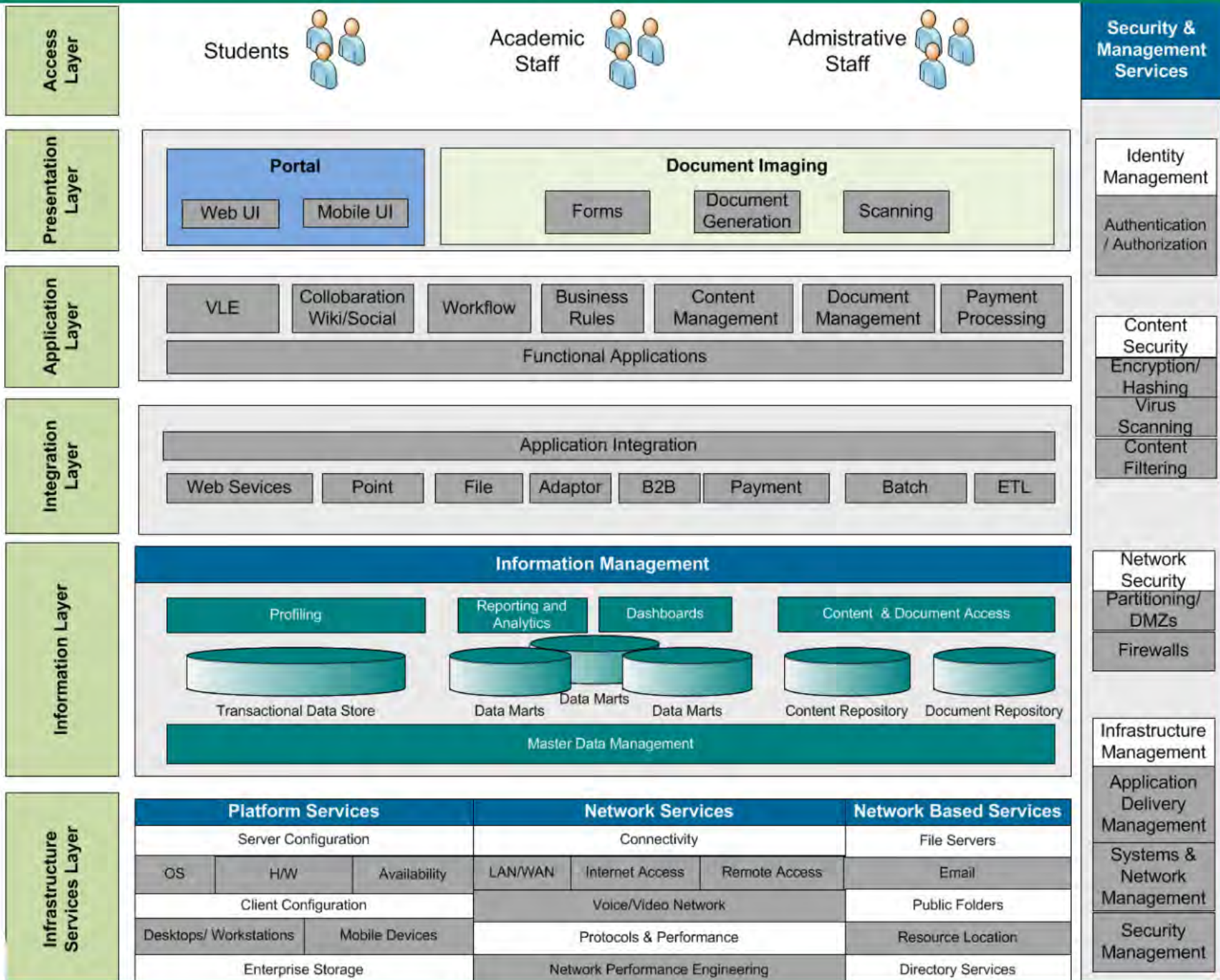


Application Architecture

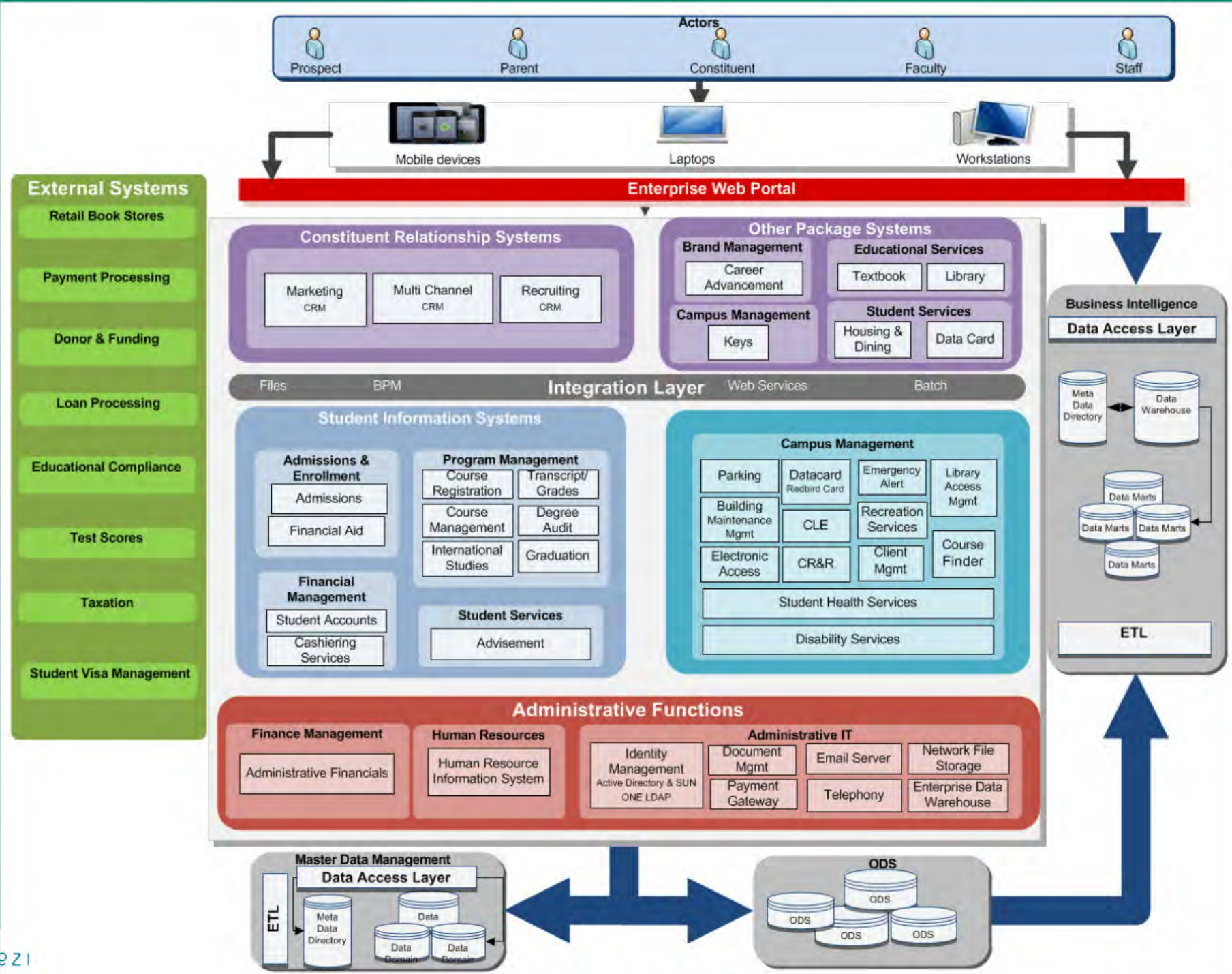


Technical Reference Architecture

Technical Reference Architecture



Application Architecture



Togaf Deliverables and Artifacts created

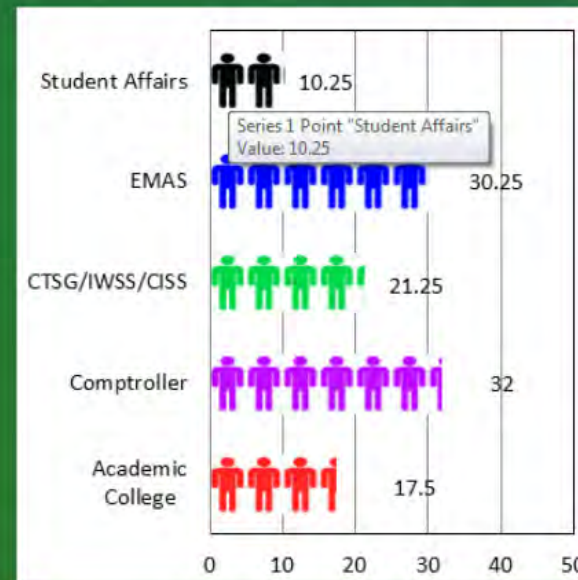
Project Deliverables:

Expected Project Deliverables	Completed	Count
Request For Proposal	Yes	1
Business Requirements	Yes	1
Technical Requirements	Yes	1
Academic Drivers	Yes	1

Subject Matter Experts reviewed and approved the RFP Requirements

The RFP was also reviewed by the Technical Requirements team from SAIT, OAT and AT. Final review by the Steering Team and the Procurement Office

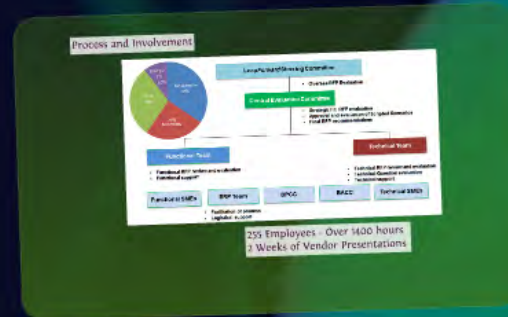
University Involvement



AIE RFP Evaluation

March 2013 to July 2013
 Led by Dina Vaughan
 Focus on evaluating and scoring the responses from the Vendors.
 Central Evaluation Committee

TOGAF
 ITIL
 PMI



Category	Sub-team	Requirements	Questions	Scenarios
Functional Sub-teams were created	Requirements	10	10	10
	Scenarios	10	10	10
Technical Sub-teams were created	Requirements	10	10	10
	Questions	10	10	10
Most were involved in the RFP Creation	Requirements	10	10	10
	Scenarios	10	10	10

Identify Evaluation Teams

Educate and Guide Evaluation Teams

Develop Scripted Scenarios

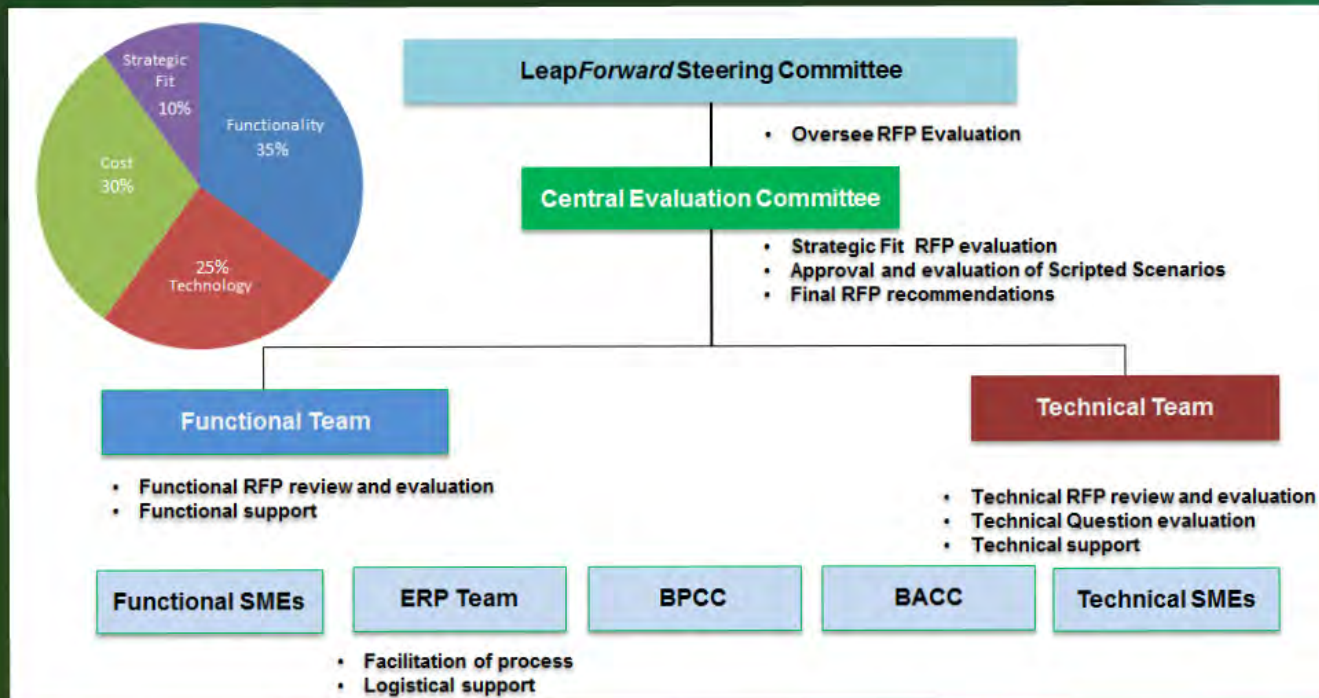
Score and Rate RFP Responses

Final Recommendations

IN PROGRESS

January 2013

Process and Involvement



255 Employees - Over 1400 hours
2 Weeks of Vendor Presentations

Req#	Sub Process	Business Requirements	Functional Team Lead	Priority (E = Essential, D = Desired, O = Optional)	Priority Weighted	Total of Academic Drivers Identified	Currently Delivered with the products (4)	Can be met with a 3rd Party product or a module add-on (0)	Not Supported (0)	Customized Solution (-2)	Customized Bolton Solution (-4)	If requirement can be met by a 3rd party product or a module add-on, please explain more in depth.	COMMENT	Total	Scenario Needed	Adjustment based on Comment	Adjustment Based on Scenario
1	Admissions	Provide ability to create student application from existing prospect record.	Stacy Runsey	E	3	3.1								0			
2	Admissions	Provide ability to submit applications for the same applicant for entry into multiple programs for the same entry term.	Stacy Runsey	E	3	3.5								0			
3	Admissions	Provide ability to select a proxy program when applying for entry into multiple programs.	Stacy Runsey	E	3	3.5								0			
4	Admissions	Provide ability to match available scholarships to submitted applications.	Stacy Runsey	D	2	4.3								0			

	Oracle	Elucian	Max
Functional Requirements			
Admissions			638.8
International Studies			111.6
Recruiting Total			219.2
Student Record Management & Student Registration Total			1001.2
Financial-Aid Total			803.2
Student Accounts Receivable Total			666.4
Advisement Total			918
Certification and Compliance Total			447.6
	0	0	4806
Functional Scenarios			
Admissions			288
International Studies			26
Student Record Management & Student Registration Total			308
Financial-Aid Total			148
Student Accounts Receivable Total			124
Advisement Total			160
Certification and Compliance Total			60
	0	0	1114
Technical Questions			
General			10
User Interface			32
Application			92
Integration			28
Information			36
Infrastructure			66
Security			58
	0	0	322
Technical Requirements			
User Interface			208
Application			768
Integration			224
Information			440
Security			400
Infrastructure			76
	0	0	2116
Technical Scenarios			
User Interface			16
Application			56
Integration			16
Information			14
Security			10
Infrastructure			12
	0	0	124
Total Score	0	0	8482

Functional Sub-teams were created
Requirements
Scenarios

Technical Sub-teams were created
Requirements
Questions
Scenarios

Most were involved in the RFP Creation

are Use



Master Data Transition

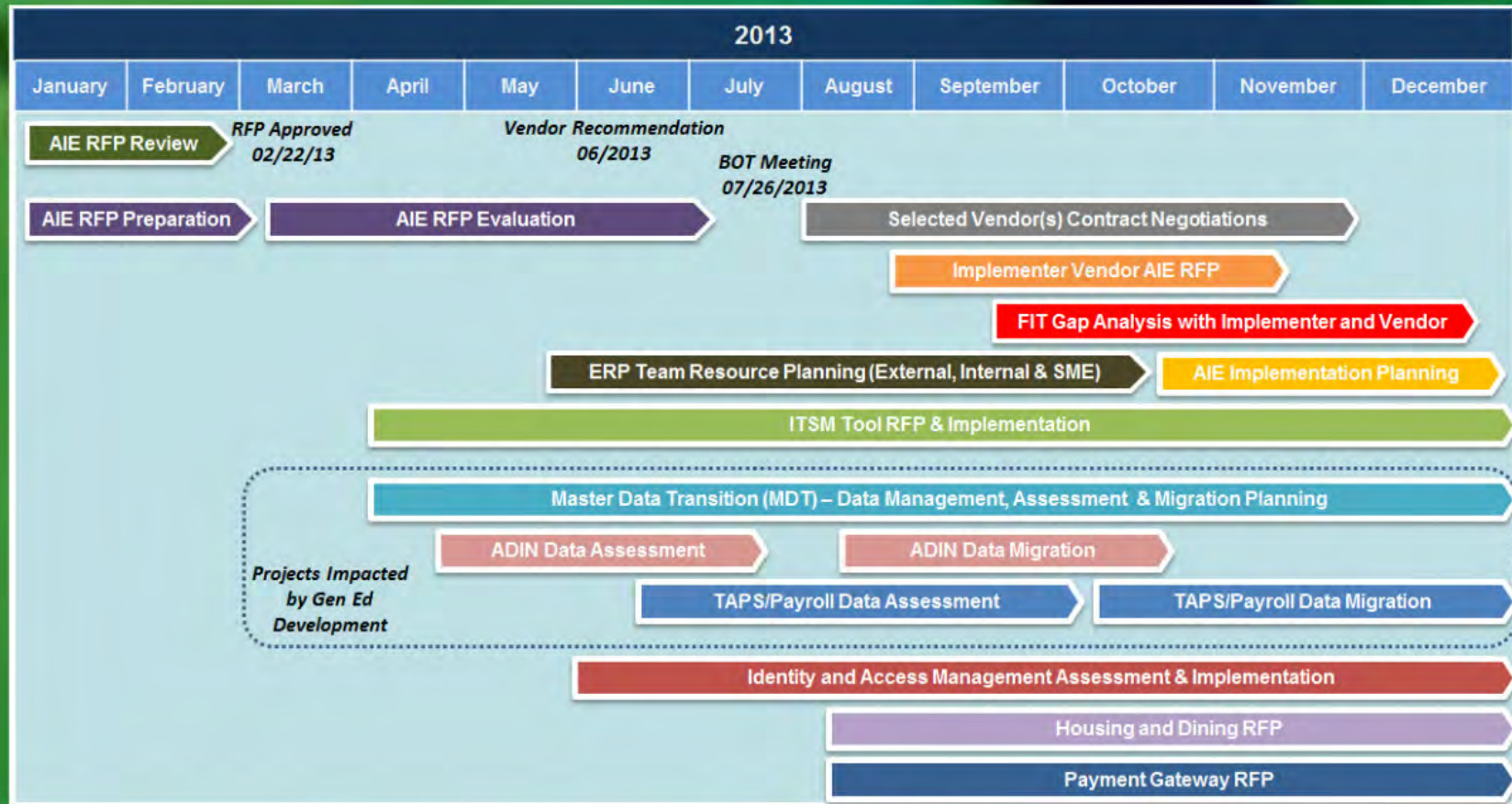
Additional RFPs

- Housing & Dining
- Payment Gateway
- Implementer

Implementation Planning

Implementation Projects

Timeline





Any Questions?

LEAP *FORWARD*

Knowledge



It ain't easy being green