

Project Charter

WebAdvisor Retirement

Executive Summary

The goal of this project is to migrate all functionality from WebAdvisor and, eventually, retire WebAdvisor. This project reviews the current usage of WebAdvisor, collaborates with stakeholders, and migrates functionality to other services like Colleague Self-Service. Functionality that have a clear and simple migration will be transitioned first. Highly customized applications will require significant work and time for migration. This project is expected to be completed in August 2022.

Business Need and Background

WebAdvisor is a product maintained by Ellucian. Ellucian has announced end of regulatory support on June 30, 2021. Additionally, sustaining support will end on June 30, 2022. Due to support ending, WebAdvisor functionality must be migrated to other services.

Ellucian's replacement for WebAdvisor is Colleague Self-Service. Whenever possible, WebAdvisor functionality will be migrated to Colleague Self-Service.

Project Description and Scope

This project requires an analysis of current WebAdvisor usage followed by stakeholder meetings to determine the appropriate migration plan with agreed upon timelines. The data below reflects outcomes from stakeholder meetings.

A communication plan will be created to inform the community of this activity. This plan will ensure the individual stakeholders and the community understand the scope of this project and when activities are happening.

This project specifically involves the following departments and activities.

- Accommodations (Amy Sireci). Requests for accommodations will be migrated to Colleague Self-Service. This activity is dependent on modifications to the Colleague API.
- Committee workflow (Mickey Park). Committee management will be migrated to Colleague Self-Service via the creation of new screens. The community will use this to view active committees and membership status. The stakeholder will continue to use Colleague UI Web to manage the committees. Additionally, the stakeholder has requested the changes to committees and requests to join committees will be handled via email. This activity is dependent on modifications to the Colleague API.

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- Finance (Grayson Meeks). Finance functions will be activated in Colleague Self-Service allowing for requisitioning and other finance activities. This activity requires the configuration of parameters in Colleague. Persons may continue using Colleague UI Web for requisitioning; but, the stakeholder is encouraging the use of Self-Service instead.
- Human Resources (Missy Kittner). Human Resource functions will be activated in Colleague Self-Service. This activity requires the configuration of parameters in Colleague and Colleague Self-Service. Time entry, pay, position summary, and leave will be accessed via Colleague Self-Service.
- Institutional Research (Laura Wichman). Reports used by the stakeholder are being transitioned to another solution. The stakeholder will update these reports and users will no longer use WebAdvisor to view program review data. The data will be available via the Institutional Research website.
- Professional Development (Mikken Canham, Staci Taylor). Professional Development functions will be migrated to the Continuing Education portal. There, employees will perform program changes, class registration, academic program reviews.
- Student Records & Registration (Holly Surginer, Herman Tucker).
 - Class roster. Functionality of the class roster will be migrated to Colleague Self-Service. This requires the customization of the roster and is dependent on modifications to the Colleague API.
 - Course substitution. This functionality will be migrated into Colleague UI Web. This requires screens to be enabled, updated, and/or customized.
 - Proxy user configuration. This functionality requires configuration changes in Colleague and the use of the Colleague Self-Service FERPA forms. Students will grant permission for proxy access via a Colleague Self-Service screen to their parent or guardian.

Project Schedule

Analysis of current activities predict the conclusion of this project by the end of August 2022.

Milestone	FY2021-Q2			FY2021-Q3			FY2021-Q4			FY2122-Q1			FY2122-Q2			FY2122-Q3			FY2122-Q4		
	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Plan	█	█	█	█																	
Communications Planning					█	█															
Institutional Research			█	█	█																
Course Substitution				█	█	█															
Proxy User Config					█	█	█														
Human Resources					█	█	█	█	█												
Prof. Development				█	█	█	█	█	█												
Finance					█	█	█	█	█												
Committee Workflow										█	█	█	█	█	█	█	█	█	█	█	█
Accommodations										█	█	█	█	█	█	█	█	█	█	█	█
Class Roster										█	█	█	█	█	█	█	█	█	█	█	█
Retire WebAdvisor																					█

Project Budget

Internal FTEs will be used for all aspects of this project including configuration, project management, communication, and quality assurance.

Project Management and Governance

The roles for the project team are defined below. Decisions regarding the installation of equipment will be made by Mario Leal with input from the project team and Executive Sponsors. Customer issues will be tracked via tickets to helpdesk@mclennan.edu. Project activities will be tracked via an excel spreadsheet. Status updates will be provided weekly via the team status report and a webpage. Scope changes must be approved by the Director of Information Systems and Services. Rita Jacinto will be the technical lead for this project.

Role	Name(s)/Organization(s)
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Executive Sponsors	<p>Johnette McKown, President Fred Hills, Vice President of Instruction and Student Engagement Stephen Benson, Vice President of Finance and Administration Phil Rhodes, Vice President of Research, Effectiveness, and Information Technology</p>
Project Team	<p>Micah Alexander, Programmer Analyst Tony Alexander, Programmer Analyst Don Hurst, Systems Analyst Rita Jacinto, Administrative Systems Manager (Technical Lead) Mario Leal, Director of Information Systems and Services Reginald Mitchell, Programmer Analyst</p>
Stakeholders	<p>Mikken Canham, Professional Development Specialist Fred Hills, Vice President of Instruction and Student Engagement Missy Kittner, Director of Human Resources Grayson Meek, Director of Financial Services Mickey Park, Compliance Technician Amy Sireci, Accommodations Coordinator Holly Surginer, Associate Director of Student Records and Registration Staci Taylor, Director of Center for Teaching and Learning Herman Tucker, Director of Records and Registration Laura Wichman, Director of Institutional Research</p>
Change Management Committee	<p>Micah Alexander, Programmer Analyst Karen Clark, Director of Admissions & Recruitment Phoenicia Clay, Associate Director of Student Accounts Receivable Chadwick Eggleston, Dean of Arts and Sciences Glynnis Gaines, Dean of Health Professions Frank Graves, Dean of Workforce & Public Service Donald Hurst, Systems Analyst Rita Jacinto, Administrative Systems Manager Missy Kittner (Chair), Director of Human Resources James Kubacak, Director of Financial Aid Mario Leal, Director of Information Systems and Services Tina Lyles, Associate Director of Advising and Career Services Grayson Meek, Director of Financial Services Reginald Mitchell, Programmer Analyst April Robinson, Associate Director of Financial Services Jodi Tindell, Director of Purchasing & Auxiliary Services Herman Tucker, Director of Records and Registration Laura Wichman, Director of Institutional Research</p>

Impact Analysis

- All employees and students will be impacted by this project. At the end of the project, WebAdvisor will be retired.
- All employees and students will need to shift from using WebAdvisor.
- All employees will need training, at different levels, to learn to use the new resource.
- Mario will copy/paste in from milestone doc.

Assumptions

- Dates for milestones could change based on findings during implementation.

- Each affected area will test the changes before going live.
- Administrative Systems staff will need to work on multiple priorities during the project. It is critical to have clear schedules and clear priorities.
- Students already use Colleague Self-Service for registration, financial aid, student finance, grade review, graduation application. Students will not need significant training. They will just need to be directed to the correct application.
- Any maintenance windows will be scheduled ahead of time giving the community ample notice.
- There will be times that staff will not be fully engaged in this project due to resource constraints. Significant communication will be needed to ensure stakeholders and the community are well informed.
- Due dates may be modified after initial stakeholder meetings.
- ISS staff are not completely dedicated to this project. Sustainment and operations of Colleague must continue. This represents competing priorities. The Change Management Committee will be involved in helping to set priorities.

Constraints

- ISS staff are constrained to forty (40) hours per week.
- ISS staff are required to provide support during this project.
- ISS staff are constrained by stakeholder availability to work on this project.
- ISS staff are constrained to use the software and services already installed. No new software will be purchased for this project.

Risks

- ISS is capacity constrained. Any outage of an employee could jeopardize meeting deadlines. The team will continue exercising appropriate pandemic precautions.
- Colleague Self-Service may not provide exactly the same process that has been used in the past. Staff may need to change processes as needed.
- ISS staff is learning Colleague Self-Service workflows and developing skills. Issues may arise that have not been seen before causing delays in remediation.
- Ellucian publishes Colleague Self-Service version on a quarterly basis. Issues could arise from new software requiring changes to customizations. ISS is working to reduce customizations to limit the effects. However, ISS does not control what Ellucian may release.

Supporting Documentation

- WebAdvisor support announcement: <https://ecomunities.ellucian.com/message/256952#256952>

Revision History

Version	Date	Updater Name	Description
1.0	4/20/2021	Mario Leal	Approved for distribution.