McLennan COMMUNITY COLLEGE
Information Systems & Services

PLAN | REQUIREMENTS | SOLUTION ANALYSIS | DESIGN | BUILD | TEST | TRAIN/DEPLOY | MAINTENANCE

Project Charter

Document Management Replacement

Executive Summary

This initiative determines a direction for document management including requirements, vendor/product selection, and implementation. A Customer Steering Committee (CSC) has been formed to develop requirements and select a product. ISS will work through procurement and implementation under advisement from the CSC. This initiative replaces the current implementation of Perceptive Content ImageNow.

Business Need and Background

McLennan Community College interacts with thousands of people per year and stores more than 3 million documents. Many of these interactions produce documents that must be stored, catalogued, searched for, signed, approved, and/or used in support of college business. The current document management solution has aged, leaving it hard to use and not fulfilling the needs of the College. For instance, accessing the current solution requires Internet Explorer which Microsoft will no longer support, as of June 15, 2022. Additionally, the College uses several services to sign and store documents. This project can consolidate those services, reducing support and training costs.

Project Description and Scope

This project focuses on the replacement of the current document management system (Perceptive Content ImageNow). A CSC has been formed to govern this project to provide customer insight into the project. The CSC will create and approve requirements and participate in solution analysis. The CSC will approve project timelines, review/approve all communications, and help ensure success of this project. After a solution is selected, the Project Team will procure and implement the solution.

Before deployment, employees will be trained on the use of the new solution and a transition plan will be created for each department having workflows or operations needing to be transitioned. All currently stored documents will be migrated to the new solution. Once all operations have been transitioned, the old service will be turned off for a period of sixty days and then, after no issues appear, all hardware will be decommissioned and any data or configuration will be destroyed.

Information Systems and Services (ISS) will own the document management system. ISS staff will be trained in the maintenance and configuration of the service. Requests for the service will be received and managed through ISS's ticket system.

ISS estimates the life of this system to be five to seven years.

Project Goals

The primary success criteria for this project are defined in three goals.

Goal 1: Create a new document management service.

Goal 2: Consolidate document signing, document approval, and document storage into one solution.

Goal 3: Transition of all workflows and operations from the current solution to the new solution.

Project Schedule

PHASE	FY2020Q4			FY2022Q1			FY2022Q2			FY2022Q3			FY2022Q4			FY2023Q1	
	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Plan	■	■	■														
Requirements			■	■													
Solution Analysis				■	■	■											
Procurement						■	■	■									
Design								■	■	■							
Build										■	■	■					
Test												■	■				
Train												■	■				
Deploy													■				
Transition													■	■			
Decommission																	■

Project Budget

$250,000 of federal COVID relief funds have been allocated for this project. As of August 25, 2021, this money must be spent by May 12, 2022. An extension request has been filed. If approved, this document will be updated.

Solution Analysis will solidify the budget for this project. Once budget is finalized, this document will be updated.

Project Management and Governance

Role	Name(s)/Organization(s)
Executive Sponsor(s)	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
Customer Steering Committee	Karen Clark, Admissions and Recruitment Rene Clay, Student Accounts Receivable Shelley Cotten, MCC Foundation Sandi Jones, Financial Aid Tina Lyles, Advising and Career Services Dan Martinsen, Library Services Mickey Park, Instruction and Student Engagement Matthew Porter, Institutional Effectiveness Brenda Price, Instruction and Student Engagement April Robinson, Financial Services Amy Sireci, Accommodations Brittany Smith, Human Resources Holly Surginer, Student Records and Registration Jodi Tindell, Purchasing and Auxiliary Services
Project Team	Tony Alexander, Programmer Analyst Rita Jacinto, Administrative Systems Manager (Technical Lead) Mario Leal, Director of Information Systems and Services
Information Security	Stas Voskoboinikov, Cybersecurity and Online Technologies Manager
Infrastructure Point of Contact	Noah Daly, Infrastructure Manager
Customer Support Services Point of Contact	Jeremy Lindley, Technology Specialist and Help Desk Lead

Impact Analysis

Identify individuals, business areas and/or systems that may be affected by the project.

- All employees will need training, at different levels, to learn to use the new resource.

- Students will need resources to learn how to interact and access resources stored in the new resource.

- ISS staff will need training about the new resource. There will be a group designated as product owners and technical leaders. ISS Help Desk will be trained on how to assist in basic help requests.

Assumptions

The following assumptions have been identified.

- Ability to implement the new solution.

- On-going support of the Customer Steering Committee.

- Executive sponsor support for ensuring all current usage is transitioned to the new solution.

- ISS has the resources to perform this work.

- There is a solution that meets the college's requirements.

- ISS will own the Document Management System—not the data stored in the system.

- Units can accurately describe current processes.

- Each unit will test before transitioning to the new system.

- ISS staff will need to work on multiple priorities during the project. It is critical to have clear schedules and clear priorities.

- 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.

- Documents and data stored in the system will be protected and only viewable by appropriate staff.

Constraints

The following constraints have been identified.

- This project timeline may be constrained by the College's high processing periods.

- This project is constrained by staff who work forty (40) hours per week.

- The COVID relief expenditure date of May 12.

- The COVID relief budget.

Risks

The following risks have been identified.

- ISS is capacity constrained. Any outage of an employee could jeopardize meeting deadlines. The team will continue exercising appropriate pandemic precautions.

- Reliance upon a third-party product with which ISS has limited experience.

- Reliance upon new hardware, supporting tools, and/or software. Issues could arise from new software requiring changes to customizations.

- Resource bottlenecks based on limited skillsets.

- Implementation planning around key college processing periods.

- Inability to transition from the old solution to the new solution within the specified timeframe.

- Inability to complete deployment and use COVID funds by May 12th.

- The Ellucian Colleague implementation may include customizations which may make integration more difficult or costlier.

Revision History

Version	Date	Updater Name	Description
0.1	8/24/2021	Mario Leal	Initial template created.
0.2	8/25/2021	Mario Leal	First draft completed.
0.3	9/1/2021	Shelley Cotten	Edits made.
0.4	9/10/2021	Mario Leal	Edits and additions.
0.5	9/15/2021	CSC	CSC approved.
1.0	9/22/2021	Mario Leal	Executive sponsor approved for publication.