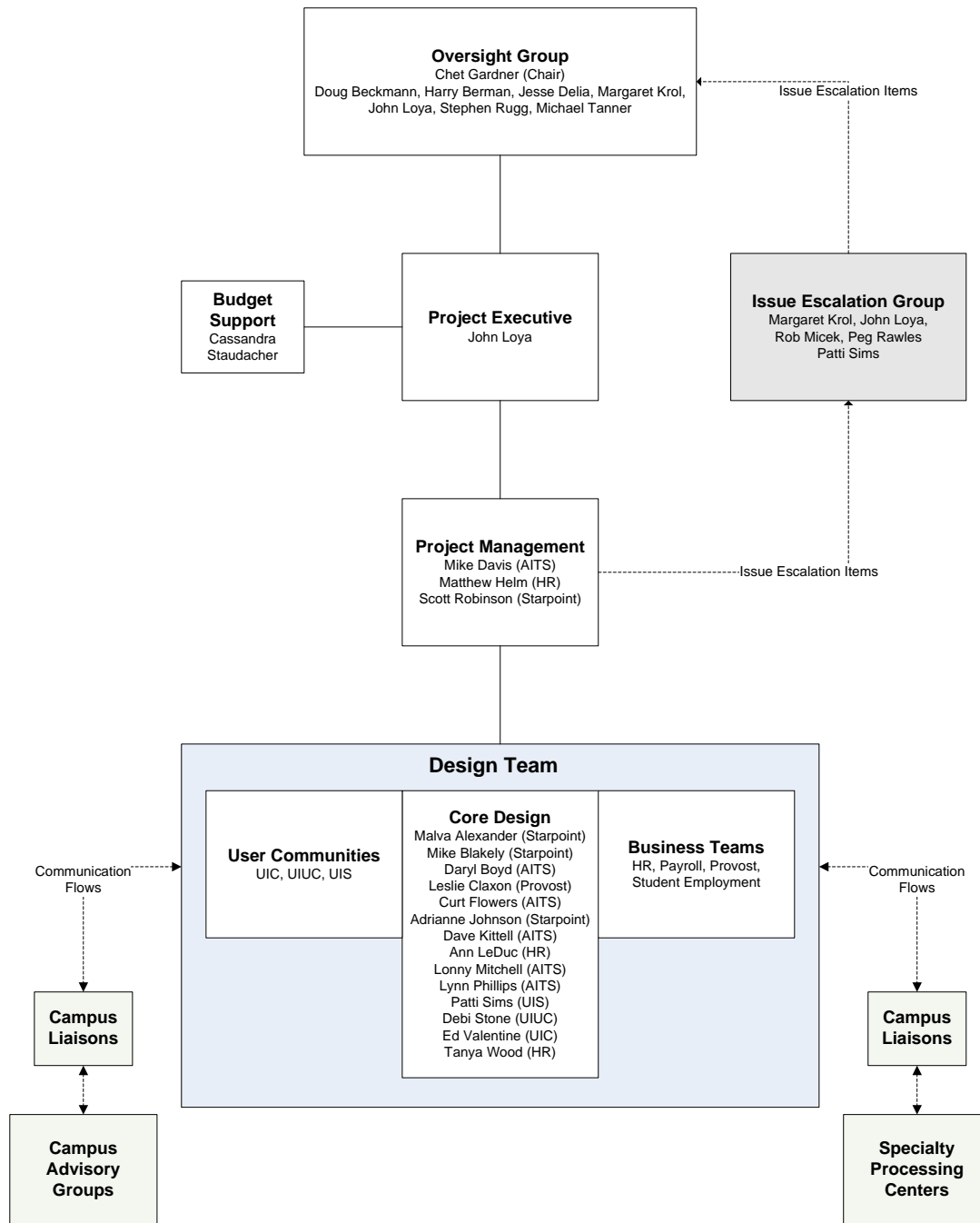


Banner HR Interface Project
Functional Design Phase
Combined Campus Advisory Group Meeting
Pontiac, Illinois
26 July 2005

Agenda

- Introduction
- Project Structure
- Design Methodology/Process
- Design Team Communications
- Technical Issues
- Advisory Group Issues (Q&A Topics)

Project Structure



Core Design Team Focus

- Conduct User Interviews
- Participate in JAD Sessions
- Develop Functional Specifications
- Facilitate Focus Groups
- Coordinate Logistics

Core Design Team

- Business Analysts (2; Starpoint)
- Campus Liaisons (3; UIC, UIUC, UIS)
- Developer (AITS)
- Documentation Specialist (HR)
- Functional Analysts (2; HR)
- Information Architect (1.5; Starpoint)
- Technical Analysts (2; AITS)
- Training Analyst (HR)

User Communities Focus

- Usability of Interface
- Required Data Elements
- Horizontal Routing

Composition of User Communities

- Groups of no more than three people
- Campus Liaisons assisting in defining and staffing communities
- Communities replicated at each campus
- Allow input from wider audience

Business Teams Focus

- Policy and Rules
- Process flows
- Data Integrity
- Vertical Routing

Business Teams Composition

- No more than three people per team
- Staffed by stakeholders of the application (Finance, HR, Payroll, Provost Office, Student Employment)
- Campus Liaisons assisting in staffing teams

Advisory Team Focus

- Assist in validation of Design Decisions
- Help resolve intra-campus conflicts/disagreements
- Facilitate feedback on final prototype moving out of design

Design Methodology/Process

Starpoint Solutions

- 25 year multi-practice company across multiple industries:
 - Professional Development Services for custom projects
 - Enterprise Software Services for ERP implementations
 - Temporary and permanent consultant staffing
- Have assisted the University of Illinois with staffing Data Conversion, Data Modeling, and Data Warehouse projects such as Decision Support
- Have completed projects with other universities such as the University of Pennsylvania, Thomas Jefferson University, and the University of Massachusetts

What are we doing?

- Creating a system that puts the University of Illinois users' needs first
- Putting a web-based, custom user interface on “top” of Banner to better organize data and incorporate University business rules
- Adding a functional “layer” between the interface and Banner to enhance capabilities not available directly in Banner (e.g. routing and tracking)
- Using an Iterative Approach to gather requirements

How will this affect Users?

- Participation should not exceed 8 hours per month
- Participate in interactive interview(s)
- Review interview results and be available for potential follow-up questions

Methodology Highlights

- Based on a Modified Version of the Rational Unified Process (RUP)
- Five Main Phases (User Interviews, Group JAD Session(s), Breakout Sessions, Functional Design, Prototype Development & User Testing)
- Iterative Process of Requirements Gathering
- Final Deliverable is the Functional Design Document (FDD)

Current Stage: Functional Design

- Level 2 Template specifications
- Leveraging the University's deliverables from the Pre-Design Phase
- Summary of Pre-Design joint advisory group meeting
- Functional Design Framework Document

First Phase: User Interviews

- Patterns “a day in the life of a particular user”
- Two to three users at a time
- Deliverable: initial project plan, high-level parameters

Second Phase: Joint Application Development (JAD)

- All-day group brainstorming
- Summarize and group requirements taken from interviews
- Create one business model to use to stimulate discussion about transactions
- User functionality matrix, detailed use case inventory, site map

Third Phase: Breakout Sessions

- Model business transactions in detail
- Development of business and validation rules
- Create process flows
- Deliverable: Elaborated use cases document

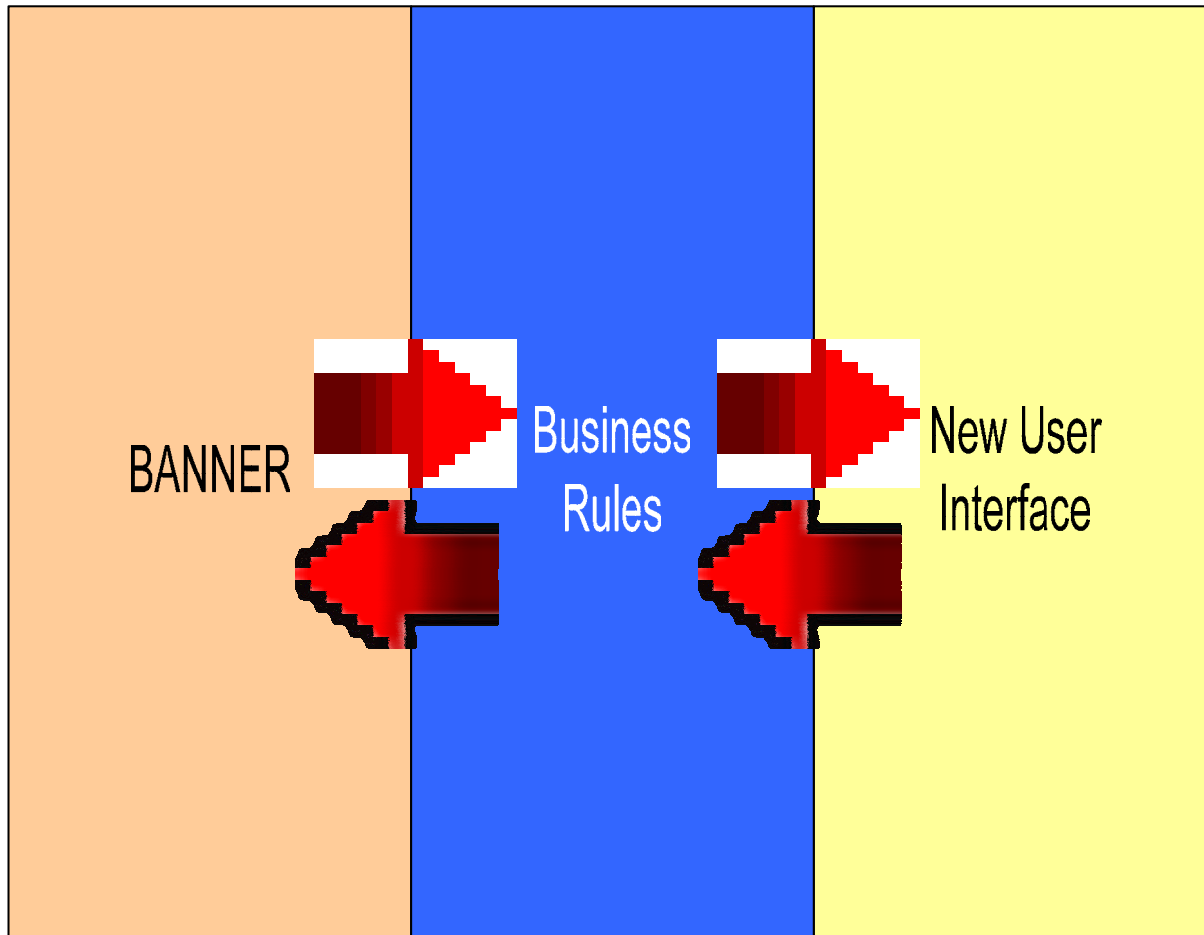
Fourth Phase: Functional Design Document (FDD)

- The “blueprint” of the proposed system
- Screen-level functional design
- Detailed, complex business rules
- Wire Frames (screen layouts)
- Deliverable: Functional design document

Phase Five: HTML Prototype

- Clickable, static (non-functional) HTML prototype with iterations
- Focus groups to obtain feedback on user experience
- Deliverable: Updated functional specifications and screens that will ultimately tie in to business rules to function with Banner

How will it work?



When will the project start and conclude?

Functional Design June 2005 – Dec 2005

- Interview Users July – August 2005*
- JAD Sessions August 2005*
- Breakout Sessions September 2005*
- Document Requirements August – October 2005*
- Functional Specs October – November 2005*
- Prototype new system October –
December 2005*

Design Team Communications

Communication Goals

- Communicate project progress
- Alert users of change
- Preparation for interviews, sessions
- User Feedback
- Go/No Go Decision

Primary Audiences/Stakeholders

- Oversight Group
- Issues Escalation Team
- HR Leadership Group
- AITS Management Group
- Starpoint Solutions
- Campus Advisory Groups
- Unit / Department Business Management (with HR Responsibilities)
- Banner User Community
- Core Project Team
- Campus User Communities
- Business Teams
- Other Interested Parties

Roles and Responsibilities

- Project Management Team
 - Consists of 3 Project Managers: one from HR, one from AITS, and one from Stairpoint Solutions.
 - Responsible for communicating to key stakeholders (Oversight Group, HR Leadership Group, AITS Management Group, Issues Escalation Team, Starpoint Solutions)
- The Communications Sub-team
 - Consists of 3 Campus Liaisons, one Documentation Specialist, and one Training Analyst
 - Responsible for putting in place the communications process, developing the communication messages, and producing the communication tools
 - Responsible for communicating with the Campus Advisory Groups, User Communities, and Banner User Communities, as well as provide content for all HR and AITS communications
- Campus Advisory Groups
 - Responsible for providing feedback to the communications team
 - Will assist in verifying a list of Banner users on their campus

Avenues of Communication

	Media				
Groups	Email	Meetings	Web	Exit Interviews	IM & Phone
Project Managers / Executive	X	X	X		
Communication Sub-team	X	X	X		
Campus Advisory Groups	X	X			
Campus User Communities	X	X		X	
Bus. & Funct. Analysts	X	X		X	
Business Teams	X	X			
Unit Managers	X		X		
Banner User Community	X		X		
Core Design Team	X	X	X		X
Other Interested Parties			X		

Avenues of Communication

	Frequency			
Audiences	Weekly	Bi-weekly	Monthly	As Needed
Executive Leadership Groups		X (3 rd Week)		
Campus Advisory Groups		X	X	
Campus User Communities	X			
Unit/Department Bus. Managers	X (Phase I & II)			X (TBD Phases III – V)
Business & Functional Analysts to Campus User Communities	X			X
Business Teams			X	
Banner User Community	X		X	
Core Design Team	X			
Other Interested Parties				X

Communications Calendar (Sample)

Communications Calendar July – August 2005

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
July 25	26 Joint Advisory Group Meeting	27	28 Initial Banner User Email	29	30
User Community Interviews - Urbana					31
August 1	2	3	4	5	6
User Community Interviews - Chicago					7
Email Campus Advisory Group	Email Campus User Communities			Update Website Email Banner Users	13
8	9 Leadership Group Meeting	10 Campus Advisory Group Meeting	11	12 Update Website Email Banner Users	14
15 Email Campus Advisory Group	16 Email Campus User Communities	17	18	19 Update Website Email Banner Users	20
22	23 Email Campus User Communities	24	25	26 Update Website Email Banner Users	27
					28

Next Steps

- Begin production of individual communication medias or vehicles
- Joint Advisory Group Meeting
- Initial Banner User Communication
- Website Production

Technical Issues

AITS Members

- Ensure design decisions comply with “back-end” structure
- Analysis of messaging components
- Participate and provide input to technical breakout sessions
- Analyze options for and feasibility of routing mechanisms
- Analyze options for and feasibility of application security
- Analyze interactions between new user interface and other third party applications (such as Document Management, Nessie, etc.)