

Thursday, September 20, 2012

3:00 pm - 5:00 pm

25 Science Park Room 663

In attendance: Roseann Adams (PMO), Faith Brown, Karen Colburn-Murphy, Paul Draghi, Mike Dula, John Jibilian, Lec Maj, Susan Monsen, Joe Paolillo, Len Peters, Randy Rode, Russell Sharp, Susan West (ITS Staff), Alan Usas.

Guests: Vijay Menta, Gabriel Olszewski, Neha Agrawal, Bob Davis, Joyce Lush, Lou Tiseo, James Rawlins, Adriene Radcliffe (remotely), Terri Smalley, Jason Shuff

Quorum is reached.

1. Review of portfolio health - Focus on Research Enterprise

a) Check in for Research Enterprise - Proposal Deployment - 3:00 - 3:10

Led by Bob Davis with Joyce Lush

See attached slides for additional detail

- Pre-TOC approval for this project with agreement for update to TOC
- Project will dramatically improve how sponsored research is conducted through improvements in Process, Organization, and Technology
- An attempt to significantly decrease the amount of time faculty spends on administrative documents related to research grants.
- Currently a very manual process including preparing documents locally, scanning, and uploading.
- Project future has been piloted with three departments and has gone well.
- Question: What is the data included in these proposals?
  - Budget
  - Resources
  - Compliance
  - Conflict of Interest documentation
  - Scientific details
- One goal is to make sure when faculty adopt the new system, they do not also keep their old system going.
- This must be done in a standard way, so that there is one system that all adopt. Therefore, it is important that the Research Administration team is prepared to support faculty through these processes.
- This process that will eventually be required for use.
- Originally built the system for research administration staff, not to be used by faculty. The Research Admin team has been pleased with the system thus far and faculty involved in the pilot have been more engaged and willing to adopt the system than originally planned/expected.
- Rollout will take place in 7 waves.
- Questions and Comments:

- What is happening with the finances? There have been some requests for funding above original requests and the impression is that the program has experienced continuous cost overruns.
- Is this technology we see ourselves embracing long-term?
- Faith will set up future time for RA to present and answer these and discuss viability of the technology and the investment.

## 2. PROV23 Curriculum Planning and Publications - Phase I - Request to initiate 3:20 - 3:40

Led by Neha Agrawal, with Vijay Menta and Gabriel Olszewski

See attached slides for additional detail

- Solution for Curriculum planning and publications
- Questions and Comments:
  - Since professional schools are excluded, will there be alternative services?
    - The immediate plan is to use this at the Yale College and Graduate School level, with the hope that this may be adoptable almost immediately for Professional Schools
    - Customized requests would take more time
  - Why are we excluding professional schools in vetting this option? Many are in need of such a service and/or building their own.
    - This will follow the same CIMS approach. CIMS was not widely adopted chiefly because the professional schools were not included in the analysis/project.
    - Law school is currently building a separate solution. They cannot use CIMS and the community is crying out for improvements
    - This seems like a great opportunity to involve professional schools in the conversation. Perhaps this is at least worth the conversation.
    - Adding this to the gap analysis is important and will be acted on.
  - Content analysis and workflow pieces and publication components, do the vendors meet all of these needs?
    - The three prime vendors do 1-3 pieces well
    - Some vendors have a course approval system at the front end, but not all.
  - Where do these systems sit with the Registration piece?
    - Tool for faculty to manage their curriculums. 4 parts of the tool:
    - Managing the curriculum, creating the curriculum, sharing information about the curriculum.
    - Offering the curriculum
    - Publishing the curriculum
    - Advising component
    - This piece is primarily focusing on faculty as clients, while feeding curriculum information to students.
  - Are you aware of what some of the needs are outside of the professional schools?

- The college has the most robust curriculum review process. Graduate school side is much simpler process. Professional schools have a wide range of robustness and looseness.
  - Further recommendation from Yale College rep that we expand the analysis of this project to include the professional schools.
- Future state: moving several different systems to one system, which will hang closely off of Banner. Black box systems that are filling gaps that Banner has.
- Motion to approve the project with expanded analysis to include the professional schools. (Len) Seconded. (Karen)
  - In favor: 12
  - Against: 0
  - Abstain: 0

3. ITS050D - Hardware and Software Asset Configuration Management Database - CMDB - Request to continue to next phase (post Planning check in) + External Spending Request 3:40 - 4:00

Led by Lou Tiseo with James Rawlins and Adriene Radcliffe

Please see attached slides for additional information.

- Turning on capabilities in Service-Now that are part of our capability package
  - Require integration, relationship development with business processes
  - No additional cost, above current FY13 allocation, just resources and system integration time.
- At the end of the project five of the business services will be complete.
  - Still considering which services will be upgraded
- External Spend Request of \$267K total. Spend/delivery reviews at the end of each iteration.
- Questions and Comments:
  - Do you keep track of all of the applications on VMs?
    - We keep track of many of them, but have not extended to all. If they are a VM on a virtual infrastructure, we do capture it.
    - Using the CMDB to capture all applications should be doable.
    - Is there an interface from VM ESX to the CMDB? Yes.
  - Looking at the milestones, by the end of December you plan to have Service-Now and Classes v2 essentially done. Will you then have something to show at that time? Yes, although Classes v2 may be passed to a later phase.
  - You are using an iterative approach; did you consider putting your most important foundational functionality at the beginning?
    - Yes, this was considered, but we need to wait until we upgrade Service-Now to the next version in order to be able to fully integrate with all business services.
    - Is there hidden impact on the students or faculty, or is this completely transparent? This will be transparent.

- It should impact positively our delivery of services, which could be reported back to the larger community for statement of significance.
- Building out the business service is building out the relationships end-to-end.
- The project is only building out five business services, what about other business services? We are starting with critical business services.
- Things that may not be visible to the community could be reported out to the larger community to respond to the necessity of this project.
- We can use the solution to for software auditing and it will help us manage our software and allow us to respond to audits.
  - Motion to approve (Alan). Seconded (Susan M & Len)
- In favor: 12
- Against: 0
- Abstain: 0

#### 4. HEAL16 - eSirius Phase II and III - Request to Initiate FY13 work and External Spending Request - 4:00-4:20

Led by Terri Smalley with Joyce Lush

Please see attached slides for additional information.

- Client-funded project been going on for a year, but put on hold in March because of a competing need for resources.
- Seeking permission to re-launch and pick up where team left off.
- Our timeline/dates are constrained by the vendor which has been tied up with other clients
- Phase II - Technology Assessment and Oracle Data Migration
- Phase III - eSirius 3G Web Deployment to Pilot Users in Research Community
- There will be around 1000 users of this application.
- Questions and Comments:
  - Project broken into two phases
    - Overlap of two phases because of 3G Deployment need for customization for Yale
  - Only two weeks of deployment for pilot deployment.
  - Phase IV will be a completely separate project and will roll the product out to the rest of the community.
  - How is supported?
    - Business office within YARC with own IT Partners
    - Health & Med Client Team and Research Admin Client Team
    - Vendor
  - Significant customization costs, why?
    - We chargeback and other universities do not (cost recovery here)
    - Our labeling is different and requires more
  - There are not many vendor options for this solution. The highest risk is that the vendor is working with a large Pharmacy company on a module Yale does not

need, so we have to wait until the vendor completes development on the features we need.

- The pilot phase is 12 months, for only 3 groups, why is it so long?
  - The level of complexity to the system and all of the nuances for this.
  - This is the worst-case scenario because of our #1 risk
  - The vendor does not test, period, so we must accurately prepare for this.
  - We have explored options for testing prior to some of the customizations (such as the chargebacks).
- This is externally funded? Yes. The functional teams are aware of the recurring costs? Yes, and they are very happy with the cost recovery.
- Who oversees the contract? We have overseen the SLAs, but YARC is responsible.
- Motion to approve (Joe). Seconded (Russell).
  - In favor: 12
  - Against: 0
  - Abstain: 0

#### 5. Platform Testing - Request to Initiate and External Spending Request - 4:20 - 4:40

Jason Shuff

Please see attached slides for additional information.

- Questions and Comments:
  - What is the shape of the test plan?
    - Shake-out test
    - We cannot do full testing because it may take days, weeks, etc.
    - This allows an application to have high-level things taken care of and then can reach out to the functional team.
  - Can any of the tests be automated?
  - We would like to test 100 applications initially. We are estimating 30% of the tests can be automated.
  - The rest will be worked on manually. Manual test benefits: these cases allow us to test more often, manual test suites cost less to maintain than automated test suites.
    - It seems like there is an opportunity for this team to serve as a sort of best practices resources to get best practices in the community.
    - This is an opportunity we plan to take advantage of. We can establish a Community of Practice across the university to improve our processes, tools and skill base.
  - SOM is very interested in building out skills; other schools need to build out skills too.
  - This tool is quite powerful once we use it, and once it is underway we would like to roll it out for others to use it.
- You will find a ready-audience to use it.

- What are the costs?
  - There is a cost to the automated part.
    - Two choices: HP Quicktest Pro, used for Client-side application. Water, the ruby version of Silenium, we use more broadly. It allows us to test to mobile devices and to individual specific machines. We are hoping to use Water more often.
  - The self-service piece should not have any cost.
    - Going forward: to broaden across the 500 applications for the purpose of this project. Once this project proves the usefulness of the tool, we plan to broaden it across the whole university.
- Do you plan on including additional resources?
  - Yes, we plan to bring in resources that have this expertise.

Requesting for approval of \$64K now, with total estimated costs of \$238K. Original estimate was for \$215K, so this is \$23K over the original estimate.

Is there any thought that the scope should be increased to include additional requests and need from the larger technology community?

- There is opportunity for communication and involvement, but the community can be brought along while this project is going on.
- Particularly with education and training, bring the community developers along in this process. Perhaps bringing a resource from outside departments may be very beneficial.
- Documenting the testing is very important.

Voting for original spend for \$64K with an increase in overall allocation for the project of \$238K from \$215K. In addition, a recommendation for revised scope while building community into the project. Also PMO needs to assess whether the SDLC project will be move forward so that funds can be reallocated.

Motion that we approve the first phase of the funding, with some flexibility if costs increase in that period based on community-wide need, and have team come forward next month. (Russell)

Seconded (Randy)

- In favor: 12
- Against: 0
- Abstain: 0

Faith to arrange for the team to report back to the TOC next month. During the first month, the project team will reach out to schools and report their findings.

6. Dining Workforce Scheduling - 2nd Request to Initiate with external spending requests - 4:40-5:00

Please see slides for additional information.

Led by Don Landry and Vijay Menta

- TeleStaff as a stand-alone application, integration piece can be done at a separate time.
- Would they consider a stand-alone app? Yes, they would.
- Still net-savings of \$7500/month with stand-alone.
  - Quality of life increase for individuals in the organization. Auto-dialer would be programmed to call employees in order determined without involving managers.
  - This would mirror what the police are already doing?
  - Yes, but at a slightly larger volume.
  - Security is also using this, but not to the fullest benefit.
- This takes this project, allows it to line-up with other existing projects, and all units can be involved in integration at the same time.
- We will not be spending the integration dollars in this phase. We will come under budget just to implement phase 1 and phase 2 of the project. At the implementation phase, the project team will come back.
- Will this give us the opportunity to hold-off on the Kronos upgrade? On the integration portion, yes. We plan to upgrade Kronos in December still. This is an RTS project and will not come to the TOC.
- We are now asking for \$88K (pre-initiate and initiate phase), estimated at \$117K without future integration. Original estimation was about \$129K.
- Motion to approve (John). Seconded (Len).
  - In favor: 12
  - Against: 0
  - Abstain: 0

## Proposal Development Update

September 20<sup>th</sup>, 2012

IRES *Supporting Yale's Research Enterprise*

## Transformation of Research Administration Yale

Dramatically improve how sponsored research is conducted through improvements in **Process**, **Organization**, and **Technology**.

### Project Goals

- ✓ Streamlined research administration processes
- ✓ Maximize faculty time dedicated to research
- ✓ Meet new stewardship/compliance responsibilities
- ✓ Implement scalable research administration processes
- ✓ Improve faculty experience

### Key Success Factors

Responsive to the needs of researchers and administrators

Timely, value-add information at the appropriate phase of the research process

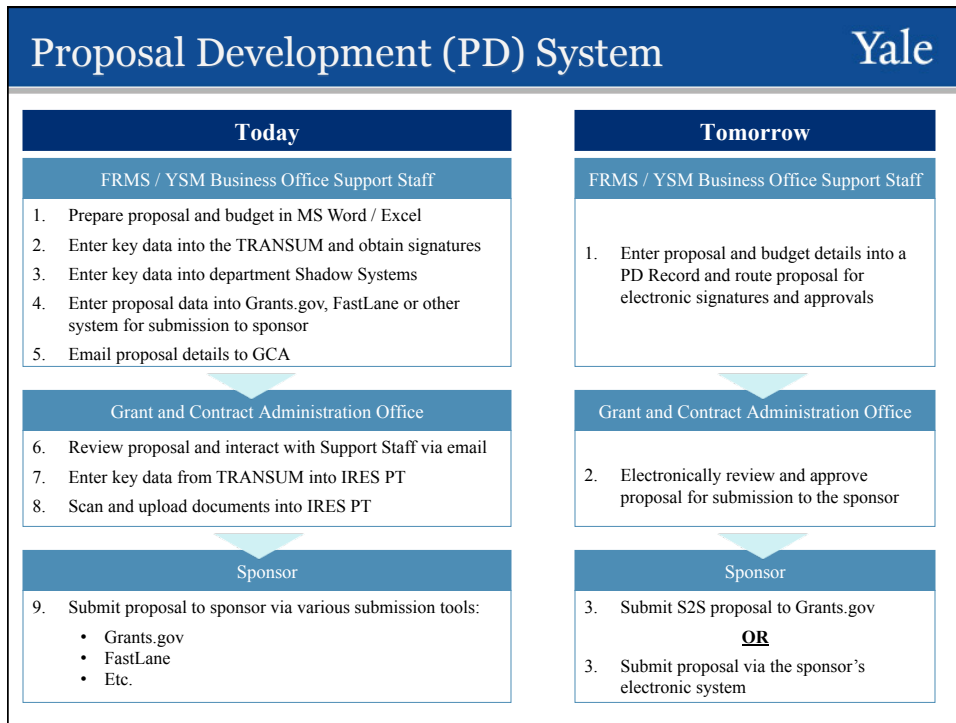
Reduce time spent on Research Administration activity

Simplify complying with sponsored research requirements



## Proposal Development (PD) System

Yale



## Lessons Learned (or confirmed) from Pilot

Yale

- We're implementing a new service delivery model – training is not enough
  - Departments will need to make significant process and role changes
  - Small departments will be guided to use shared services

*Impact on deployment:*

  - *Deployment team must help departments transition from old to new processes*
  - *Shared services for pre award services needs to be expanded*
- Application support will be more intensive than anticipated
  - System to system submission is not quite “push button” – lots of little application and sponsor related issue

*Impact on deployment:*

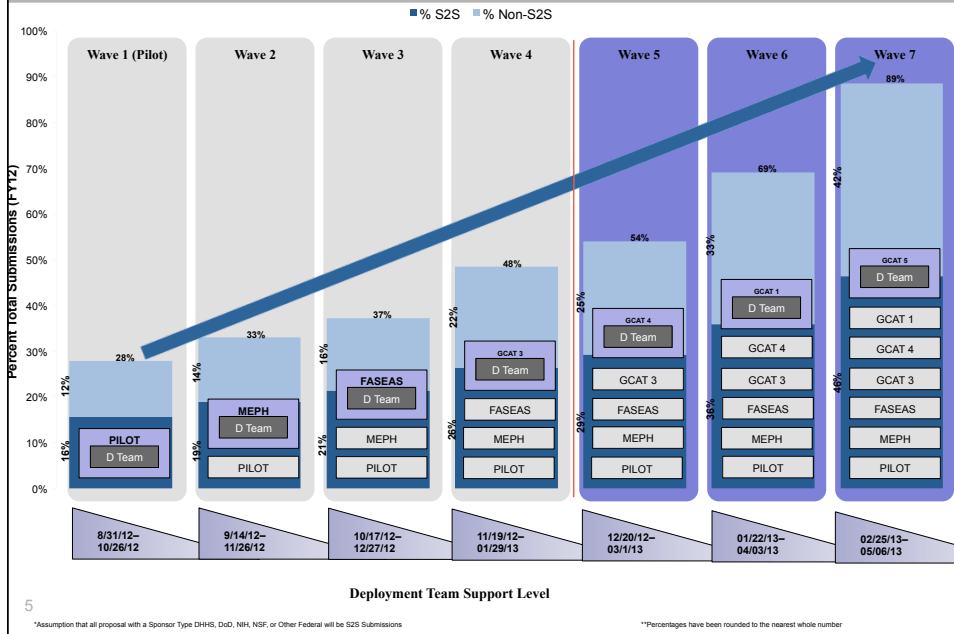
  - *Continue to work with vendor to refine templates, application*
  - *Allocate sufficient resources to support growing user base*
- Direct faculty engagement with the application looks promising
  - Application advances have created opportunities to have faculty work directly in the application (budget tool, compliance e form, routing)

*Impact on deployment:*

  - *Test tools with faculty*
  - *Adjust model to include faculty engagement in workflow (added efficiency)*

# PD Wave Deployment - S2S & Non-S2S


Yale



5

\*Assumption that all proposal with a Sponsor Type DHHS, DoD, NIH, NSF, or Other Federal will be S2S Submissions


\*\*Percentages have been rounded to the nearest whole number



**PROV-23 Curriculum Planning and Publications - Phase I**

September-20<sup>th</sup>, 2012

ITS INFORMATION TECHNOLOGY SERVICES



**Project Objectives and Scope**

**Objectives:**

- A comprehensive solution for Yale College and the Graduate School for curriculum planning and publication
- A solution that will provide a better user experience for students, faculty and staff

**Scope :**

**Includes :**

- Fit gap analysis for Yale College and Graduate Schools only- CIMS vs. Vendor solutions
- Evaluation of vendor products and current CIMS/CPF functionality
- Recommendation for proposed solution
- Road map for implementation including elimination of printed Bluebook for 2013

**Excludes :**

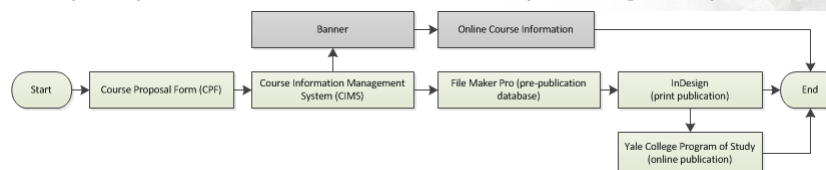
- Analysis of solutions for the professional schools and other areas of the University
- Eventual consolidation of Yale Bluebook (YBB), online course information (OCI) and online YCPS into one system

ITS INFORMATION TECHNOLOGY SERVICES

## Problem Statement



- Multiple systems in use for curriculum planning and publications.



- The broader Yale community is dissatisfied with the current systems for curriculum planning and publications.
  - Faculty find CIMS overly complicated to use.
  - Staff who manage course offerings want a single system to update both graduate and undergraduate courses.
  - Students want a more modern, feature rich, and easily navigable product than the current online and print bulletins.
- Parts of the current infrastructure are fragile and should be replaced.
  - The Course Proposal Form (CPF) system, in particular, is more than 8 years old and needs to be retired or renewed.

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## Risks/Estimated Costs



- Risks
  - Availability of functional and technical staff can delay the project
  - Delay in planning project can delay implementation project timeline
- Estimated Costs
  - Recoverable Labor Cost- \$ 29,450
  - No external spending required
- Deliverables submitted for project initiation
  - Project Charter-Signed off by Gabriel Olszewski (University Registrar)
  - Resource Plans-Signed off by Resource Managers
  - Project Plan and Milestone Chart

ITS INFORMATION TECHNOLOGY SERVICES

# IT Service Management Program

## Configuration Management Data Base (CMDB)

Adriene Radcliffe

## Project Introduction

- What is it?
  - FY13 Project as part of the IT Service Management Program. CMDB provides a “single view” of Yale’s IT configuration items (CI’s). CI’s can be anything from a server – a desktop – an application – software license or contract. The importance of the CMDB is not only the single view of all those items, but the relationships.
- Overall Project Scope
  - CMDB designed and configured in current ITSM platform along with modules for Contract Management and Software Asset Management (ServiceNow)
  - Integration with data center inventory, application inventory, desktop inventory, software license, and contracts
  - 5 business services mapped end-to-end as examples
  - Basic reporting across these capabilities

- Problems/Opportunities
  - Reporting gaps exist today (software, client teams, contracts, end-point computing)
  - ITSM process maturity requires this capability
  - Data driven decisions can be realized (software, contracts, risk)
  - Governance, Risk and Compliance systems will require this capability
- How is success defined?
  - Defined processes for mapping end-to-end business services
  - Basic reporting across these capabilities realized
  - Recommendations to modify existing ITSM processes
  - Overall project complete and on budget

- **Total Estimated Project Cost \$314K ROM**
- Initial spend request covers key resources for full project:
  - \$130K on business analysis for the fiscal year (160 hrs/month Oct-June@90/hr)
  - \$54K on contract increase for technical resources (increase of 40 hrs/month per month for Oct-June@150/hr) with Fruition
  - \$30K on specific integration contractors for data center and application inventory integrations (SOW underway)
  - \$33K on change management resource for the fiscal year (40hrs/month Oct-June@90/hr)
  - \$20K estimate on test resources
- **Total \$267K External Spend Request** covers the external spend for key resources for the fiscal year. Spend/delivery reviews at end of each iteration

# Yale University

## TOC Review – Permission to Initiate HEAL16: eSirius Phase II & III

9/20/12

Terri Smalley, Project Manager

Documents Submitted:

- ✓ Signed Charter
- ✓ Signed resource plans
- ✓ Project plan with detailed tasks for plan phase

### Project Overview: HEAL16 - eSirius Phases II - III

**Objectives:**

**Phase II:**

- Upgrade Windows environment from 2003 to 2008.
- Migrate from physical servers to VMware.
- Migrate from Visual Fox Pro to Oracle database.

**Phase III:**

- Pilot NTM's new eSirius 3G product with a robust, user-friendly web-interface for the Animal Research Community to order animals; get real-time census data; review & address billing issues; change charging instructions and authorize users.

**Benefits:**

**Efficiency:**

- Faster response time and enhanced web experience for the research community (as compared to R10B).
- Enhancements in Expert tool enable Yale to create more reports and do more customizations without requiring NTM (the vendor) involvement.
- Direct, streamlined, online animal ordering process.

**Effectiveness:**

- Pre-requisite for the highly desired Vet Care & AIM modules.
- PIs can reallocate charges in the system according to actual use.
- Automatically flags animals on holding protocols and prevents charges until the animals are released to an active protocol.

**Cost:**

- Reduce costs of physical servers by moving to VMware.
- Reduce costs associated with correcting/managing cross transfers of charges.
- Reduce cost for YARC to place animal orders.

**Safety/Compliance:**

- Avoids the risk associated with discontinuance of obsolete database software in January 2014.

**Costs:** *Estimates are +/- 20% at this phase*

|       | Actual to Date | Phase II Est. Costs | Phase III Est. Costs | Total Remaining Costs | Total Est. Costs | Ongoing Cost |
|-------|----------------|---------------------|----------------------|-----------------------|------------------|--------------|
| NTM   | \$40K          | \$0                 | \$50K                | \$50K                 | \$90K            | \$20K/yr     |
| ITS   | \$70K          | \$65K - 80K         | \$244K - 332K        | \$309K - \$412K       | \$379K - \$482K  | \$100K/yr    |
| Total | \$110K         | \$65K - 80K         | \$294K - \$382K      | \$359K - \$462K       | \$469K - \$572K  | \$120K/yr    |

**Schedule:**

|               | YARC     | ITS       | Researchers |
|---------------|----------|-----------|-------------|
| Start         | Oct 2012 | Sept 2012 | April 2013  |
| Deploy/Pilot  | Aug 2013 | N/A       | Aug 2013    |
| Staged Deploy | N/A      | N/A       | TBD*        |

*\* Deployment schedule to remaining research community (~1K users) will be determined after initial evaluation of 3G by the pilot users, but is planned to begin in FY14.*

## Permission to Initiate HEAL16: Phases II & III

| In Scope  | Out of Scope   |
|---|--|
| <b>Phase II: Technology Assessment</b>  |  |
| Evaluation, recommendations & implementation of:<br>a) Oracle databases vs. Visual Fox Pro<br>b) VMware vs. physical servers<br>c) Terminal servers vs. local desktop installs of Oracle client<br>d) OS/browser compatibility with 3G<br>e) Hardware scaling strategy<br>f) Development, testing & production instances  | Re-design of data models or Visual Fox Pro code.   |
| <b>Phase III: eSirius 3G Deployment</b>   |  |
| <ul style="list-style-type: none"> <li>Workflow automation and real-time data accessibility via the web via a new user interface</li> <li>Reverse engineering the business rules and Yale customizations in 3G that were previously made in R10B</li> <li>Deployment of eSirius 3G web functionality to a select group of pilot users in the animal research community.</li> <li>eSirius Modules: Animal Procurement, Animal Census, Services, Invoicing</li> </ul> | <ul style="list-style-type: none"> <li>Changes to the desktop applications; i.e., APIs, Pre-Trial &amp; Month-End Period Closes</li> <li>Deployment of eSirius 3G to the entire animal research community.</li> <li>eSirius Modules: Protocol Management, Personnel Training &amp; Health Management</li> <li>Changes to IACUC's Sirius 5.0</li> </ul> |

3

## HEAL16 Gating Schedule by Phase

### Schedule for Phase II: Technology Assessment and Oracle Data Migration

| Phases         | Start Date | End Date |
|----------------|------------|----------|
| Analyze/Design | 9/23/12    | 10/3/12  |
| Build/Test     | 10/4/12    | 1/9/13   |
| Deploy         | 2/6/13     | 2/7/13   |
| Close          | 2/8/13     | 2/12/13  |

### Schedule for Phase III: eSirius 3G Web Deployment to Pilot Users in Research Community

| Phases  | Start Date | End Date   |
|---|------------|------------|
| Plan/Analyze/Design                                     | 06/21/2011 | 12/03/2012 |
| Build (reverse engineering & customizations to 3G base) | 12/4/12    | 3/13/13    |
| Test  | 3/13/13    | 7/19/13    |
| Deploy  | 8/1/13     | 8/1/13     |
| Warranty  | 8/2/13     | 10/24/13   |

Resumes ~10/15/12

4



## High-Level Risks

| ID# | Risks   | Potential Impact (Scope/Resource/Time)  | Mitigation  |
|-----|---|---|---|
| 1   | NTM is the primary driver for the schedule since they are coordinating the deployment of 3G to 9 other clients at the same time they deploy to Yale.  | Time  | <ul style="list-style-type: none"> <li>Weekly updates with NTM on progress with date ranges and likelihoods.</li> <li>ITS resources work on other items during the lulls to prevent over-charging to YARC while optimizing resources.</li> </ul>  |
| 2   | Customizations are required to NTM's "out of the box" eSirius product to meet Yale's unique needs. There is a large degree of uncertainty around the requirements which may result in a change requests and increased NTM costs and delays. | Scope, Resources & Time:<br>Significant customization introduces risk and complexity into the project | <ul style="list-style-type: none"> <li>Balance business needs against effort and cost to make decisions and limit change requests.</li> <li>Within reason, adapt requirements to the product's capabilities and look at other options, such as re-engineering business processes.</li> <li>Plan contingency for change requests in schedule.</li> </ul> |
| 3   | If testing time is insufficient or reduced in an attempt to make up time and meet target dates, then the quality of code launched into production may be poor resulting in lack of client satisfaction and support.                         | Quality and scope   | <ul style="list-style-type: none"> <li>Report issues in a timely manner.</li> <li>Ensure adequate testing time is planned, as well as for time to resolve issues found in testing.</li> </ul>   |
| 4   | If terminal server does not work with Oracle to support the client install, then local client installs of Oracle will be required on each desktop.  | Scope   | <ul style="list-style-type: none"> <li>Early testing to prove/disprove and allow for the appropriate planning.</li> </ul>   |
| 5   | Visual Fox Pro support will be discontinued mid-January 2015.   | Scope   | Yale to convert from VFP to Oracle prior to this date.  |

5

## HEAL16: Cost Estimation Details

**HEAL16: eSirius Phase II: Technology Assessment Cost Estimate**

|                     |            |            |         | Est Cost by Phase |  | # Days by Month |          |    |
|---------------------|------------|------------|---------|-------------------|--|-----------------|----------|----|
| Plan/Analyze Phase: | 9/10/2012  | 11/9/2012  | 8 weeks | \$ 34,162         |  | 9/10/12         | 9/30/12  | 15 |
| Design/Build        | 11/12/2012 | 11/30/2012 | 3 weeks | \$ 22,844         |  | 10/1/12         | 10/31/12 | 23 |
| Deploy              | 12/3/2012  | 12/14/2012 | 2 weeks | \$ 8,848          |  | 11/1/12         | 11/30/12 | 22 |
|                     |            |            |         | <b>\$ 65,854</b>  |  | 12/1/12         | 12/14/12 | 10 |
|                     |            |            |         |                   |  |                 |          | 70 |


| Resource                | Cost per hr          | Sept             | Oct              | Nov              | Dec             |                 |
|-------------------------|----------------------|------------------|------------------|------------------|-----------------|-----------------|
| Terri Smalley           | \$ 95                | 0.25             | 0.25             | 0.25             | 0.25            |                 |
| Mike York               | \$ 95                | 0.5              | 0.5              | 0.5              | 0.5             |                 |
| Liz Roy                 | \$ 95                | 0.6              | 0.6              | 0.6              | 0.6             |                 |
| Testing Lead (external) | \$ 96                | 0.1              | 0.3              | 0.3              | 0.1             |                 |
|                         | <b>Total "R" FTE</b> | 1.45             | 1.65             | 1.65             | 1.45            |                 |
|                         | <b>Total Cost</b>    | <b>\$ 10,279</b> | <b>\$ 23,883</b> | <b>\$ 22,844</b> | <b>\$ 8,848</b> | <b>\$65,854</b> |
| Joyce Lush              | \$ -                 | 0.05             | 0.05             | 0.05             | 0.05            |                 |
| Kathy Dobbins, DBA      | \$ -                 | 0.1              | 0.1              | 0.1              | 0.1             |                 |
| TBD, Winsys             | \$ -                 | 0.2              | 0.2              | 0.2              | 0.2             |                 |
|                         | <b>Total FTE</b>     | 1.75             | 1.95             | 1.95             | 1.75            |                 |

6

## HEAL16: Phase III Cost Estimates

| HEAL16: eSirius Phase III: 3G Deployment |            |            |                   |
|--|------------|------------|-------------------|
|  |            |            | Est Cost by Phase |
| Plan/Analyze/Design Phase                | 10/15/2012 | 12/3/2012  | \$ 5,237          |
| Build                                    | 12/4/2012  | 3/13/2013  | \$ 104,135        |
| Test                                     | 3/14/2013  | 7/19/2013  | \$ 184,842        |
| Deploy                                   | 7/20/2013  | 8/1/2013   | \$ 10,118         |
| Warranty                                 | 8/2/2013   | 10/24/2013 | \$ 28,119         |
| <b>TOTAL</b>                             |            |            | <b>\$ 332,450</b> |

| Resource                      | Cost per hr | Oct             | Nov             | Dec             | Jan             | Feb             | March           | April           | May             | June            | Total FY13        | July             | Aug              | Sept            | Oct             | Total FY14       | TOTALS            |
|-------------------------------|-------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-------------------|------------------|------------------|-----------------|-----------------|------------------|-------------------|
| Terrin Smalley, PMgr          | \$ 95       | 0.25            | 0.25            | 0.25            | 0.5             | 0.7             | 0.7             | 0.7             | 0.5             | 0.4             | \$ 53,236         | 0.4              | 0.4              | 0.25            | 0.25            | \$ 18,608        | \$ 68,995         |
| Mike York, Tech Analyst       | \$ 95       | 0               | 0               | 0               | 0.5             | 0.5             | 0.5             | 0.5             | 0.5             | 0.5             | \$ 38,603         | 0.5              | 0.5              | 0               | 0               | \$ 13,466        | \$ 52,070         |
| Liz Roy, Tech Analyst         | \$ 95       | 0               | 0               | 0               | 0.6             | 0.6             | 0.8             | 0.8             | 0.8             | 0.8             | \$ 56,618         | 0.8              | 0.8              | 0               | 0               | \$ 21,546        | \$ 78,164         |
| ITS HelpDesk, Cyndi Welsh     | \$ 95       | 0               | 0               | 0               | 0               | 0               | 0.1             | 0.2             | 0.3             | 0.3             | \$ 11,611         | 0                | 0                | 0               | 0               | \$ -             | \$ 11,611         |
| Orig Change Mgmt              | \$ 95       | 0               | 0               | 0.33            | 0.33            | 0.66            | 1               | 1               | 0.8             | 0.4             | \$ 58,126         | 0.4              | 0.4              | 0               | 0               | \$ 5,515         | \$ 63,641         |
| Testing Lead (external)       | \$ 96       | 0               | 0               | 0               | 0.5             | 0.5             | 0.6             | 0.6             | 0.5             | 0               | \$ 45,138         | 0                | 0                | 0               | 0               | \$ 0             | \$ 45,138         |
| Testing Specialist (external) | \$ 96       | 0               | 0               | 0               | 0               | 0               | 0               | 0.5             | 0.2             | 0               | \$ 11,901         | 0                | 0                | 0               | 0               | \$ 0             | \$ 11,901         |
| <b>Total "R" FTE</b>          |             | <b>0.25</b>     | <b>0.25</b>     | <b>0.58</b>     | <b>1.93</b>     | <b>2.46</b>     | <b>3.1</b>      | <b>3.2</b>      | <b>2.9</b>      | <b>2.4</b>      | <b>\$ 275,424</b> | <b>2.1</b>       | <b>2.1</b>       | <b>0.25</b>     | <b>0.25</b>     | <b>\$ 57,026</b> | <b>\$ 332,560</b> |
| <b>Total Cost</b>             |             | <b>\$ 1,945</b> | <b>\$ 3,292</b> | <b>\$ 7,290</b> | <b>\$35,390</b> | <b>\$37,126</b> | <b>\$48,639</b> | <b>\$60,720</b> | <b>\$52,285</b> | <b>\$28,728</b> | <b>\$ 275,424</b> | <b>\$ 28,908</b> | <b>\$ 22,283</b> | <b>\$ 3,142</b> | <b>\$ 2,693</b> | <b>\$ 57,026</b> | <b>\$ 332,450</b> |
| Loyce Lush, IT Manager        | \$ -        | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            |                   | 0.05             | 0.05             | 0.05            | 0.05            |                  | 0                 |
| Bob Condon, Infrastructure    | \$ -        | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            | 0.05            |                   | 0.05             | 0.05             | 0               | 0               |                  | 0                 |
| Ashley Eng, ISO               | \$ -        | 0               | 0               | 0               | 0.2             | 0.2             | 0.2             | 0               | 0               | 0               |                   | 0                | 0                | 0               | 0               |                  | 0                 |
| Kathy Dobbins, DBA            | \$ -        | 0               | 0               | 0               | 0.1             | 0.1             | 0.1             | 0.1             | 0.1             | 0.1             |                   | 0.1              | 0.1              | 0.1             | 0.1             |                  | 0                 |
| Bob Wolfe, Winsys             | \$ -        | 0               | 0               | 0               | 0.2             | 0.2             | 0.2             | 0.2             | 0.2             | 0.2             |                   | 0.2              | 0.2              | 0.2             | 0.2             |                  | 0                 |
| <b>Total "C" FTE</b>          |             | <b>0.1</b>      | <b>0.1</b>      | <b>0.1</b>      | <b>0.6</b>      | <b>0.6</b>      | <b>0.6</b>      | <b>0.4</b>      | <b>0.4</b>      | <b>0.4</b>      |                   | <b>0.4</b>       | <b>0.4</b>       | <b>0.35</b>     | <b>0.35</b>     |                  | <b>0</b>          |




**Yale**  
KRONOS® | TeleStaff

**Dining TeleStaff as a stand alone application**  
 Project Champion: Rafi Taherian  
 Project Sponsor: Jeanette Norton  
 Project Owner: Vijay Menta  
 Project Manager: Donald Landry  
 Functional Champions: Howard Bobb, Ursula Reilly

ITS INFORMATION TECHNOLOGY SERVICES

**Project Charter - Dining TeleStaff**



**Business Case**  
TeleStaff will allow Dining to schedule the workforce in a more efficient cost effective and compliant manner. Overtime cost avoidance should approach \$150K/year

**Problem Statement**  
It is time consuming and costly to schedule the workforce using the tools currently in place. It is difficult to determine what resources are available and who should be offered additional hours first.

**Goals & Objectives**

- Comply with Union agreements
- Find the most cost effective skilled replacement resource

**Project Scope**  
Scope – Install and Configure TeleStaff.  
Out of Scope – all other systems and processes, all existing hardware (clocks) and software (Kronos)

**Deliverables/Tollgates**

| Tollgate | Date       | Status      |
|----------|------------|-------------|
| Phase I  | 11/15/2012 | On schedule |
| Phase II | 1/18/2012  | TBD         |

**Steering Committee**

| Name            | Function | Responsibility |
|-----------------|----------|----------------|
| Rafi Taherian   | Dining   | Champion       |
| Jeanette Norton | Dining   | Sponsor        |
| Vijay Menta     | ITS      | Owner          |

**Team Members**

| Name          | Function         | Responsibility     |
|---------------|------------------|--------------------|
| Howard Bobb   | Dining Financial | Functional Owner   |
| Ursula Reilly | Dining Training  | Functional Owner   |
| Laura Spivey  | TeleStaff PM     | Project Management |

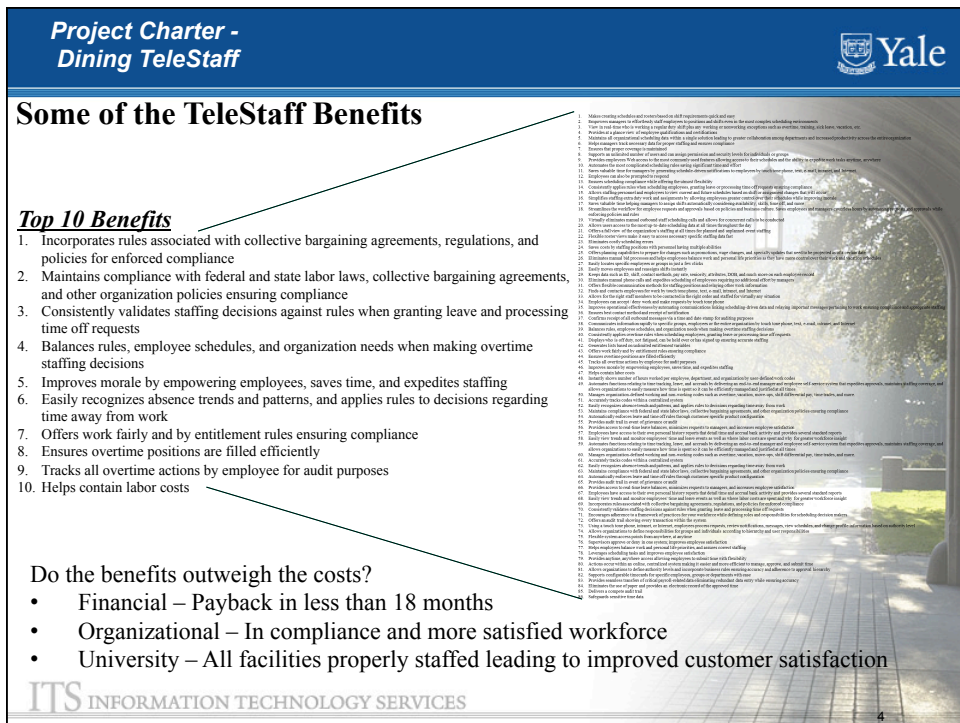
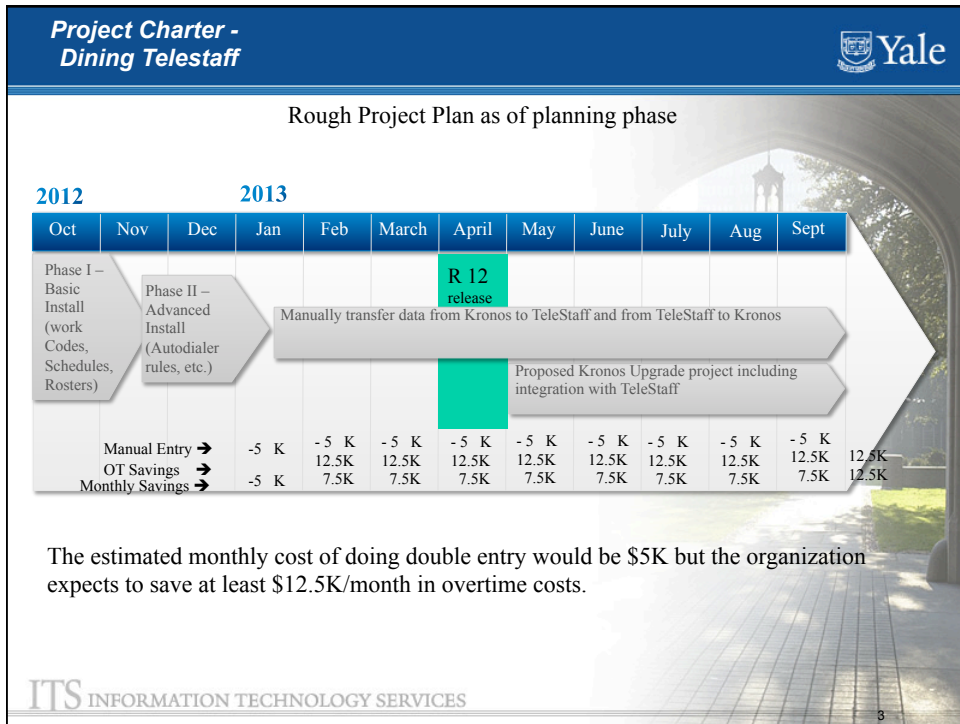
**Stakeholders**


| Name                  | Function     | Responsibility          |
|-----------------------|--------------|-------------------------|
| Dining Hall Managers  | Dining Mgmt  | Key Users of Scheduling |
| Dining Administrators | Dining Admin | Manage Staff            |

**Funding**  
Requesting \$45K for Phase I (Post software purchase)

- The \$45K includes \$14,298 for Professional Services Basic Installation and Configuration (Phase I)
- Pre-Phase I - \$42,925 spent on software licenses
- Phase I – Requesting \$45,000
  - \$14,298 for Professional Services
  - \$ 2,400 for Yale services to install wiring
  - \$28,302 for Consulting (PM, BA and CM)
- Phase II – Projected need of \$29,000
  - \$13,000 for Professional Services
  - \$13,000 for Consulting
  - \$ 3,000 for Technical

ITS INFORMATION TECHNOLOGY SERVICES





# Q&A

ITS INFORMATION TECHNOLOGY SERVICES

5

The slide features a blue header with the Yale logo. The main content area has a background image of a stone archway leading to a path in a park-like setting. The text 'Q&A' is centered in a large, black, serif font. At the bottom left, 'ITS INFORMATION TECHNOLOGY SERVICES' is written in a smaller, grey, sans-serif font. A small number '5' is located at the bottom right of the slide.

# TOC Project Health Report

Roseann Adams

Sept 20, 2012

## Overview

- Goal of project health review
  - To share project health information and metrics to aid in TOC project decisions
- Focus of project health
  - Short term – review current information regarding project health for projects status of red and yellow
    - The short term solution will focus on self-reported health
  - Long term – leverage project health metrics to determine project health for all projects (red, yellow and green)
    - The long term solution will include key project health metrics



## Red Projects



- Human Resources
  - DIN01 - Yale Dining Workforce Scheduling (New; will be presenting to TOC 9/20/12)
- Information Security
  - IDM 000 IDM Strategy Review (the project closure documents submitted to PMO)
  - ITS409 - Laptop Recovery Software Program (New)
- Collaboration
  - ITS 13 Email Modernization Phase 1 (project on pause to evaluate MS 365)

## Yellow Projects



- Academic Operations
  - PROV 22 Student Grant Database v2- (discussed 9/6)
- Faculty Life Cycle
  - PROV07 - Faculty Activity Reporting (FAR) Improvements (discussed 9/6)
- Financial Planning and Management
  - POAP 15 A/P Imaging Project (Discussed 9/6)
  - FIN32 - Faculty Financial Reporting & Data Cleanup (New)
- Research Enterprise
  - RE13 Proposal Development (discussed 9/6)

## Status from previous TOC meeting



- FIN48-03 - Yale Budgeting Tool
  - This is now in full production as of 8/27. The tool has been stable with some minor issues; currently in warranty
  
- ITS 404 Network Analysis & Redesign
  - Project Manager assigned – project moving forward
  
- ITS 418 Two Factor Authentication
  - POC running through September 10th

