DegreeWorks Focus Call

Purpose
The purpose of the DegreeWorks Focus Call is to give the potential core team members an overview of the DegreeWorks implementation. This will consist of walking through several documents and templates provided by Ellucian to assist in the implementation.

This session will typically be scheduled for 2 hrs with a WebEx hosted by Ellucian.

Sessions
Introduction
- Team introductions

Topics and documents reviewed
- DegreeWorks Implementation Overview
- DegreeWorks Team Roles and Responsibilities
- Source Document Authentication (if needed)
- Which Catalog Year Requirements To Scribe
- Scribe Kick Off Worksheet
- Educational Plans
- Implementation Timeline Discussion

Recommended Participants
These attendees should include the DegreeWorks Project Manager/Coordinator, representatives from IT, and Core Team members who are knowledgeable in the daily usage of the school’s SIS.

Facilities/Equipment requirements
The following is required
- Conference call phone
- WebEx capabilities

Expected duration
2 hours
DegreeWorks Overview

The DegreeWorks Implementation Stages

In this document we will review the three stages of a DegreeWorks implementation. Depending on your service level (Full Service, Limited Service, Client Directed) our discussions may vary slightly in some stages. It's important to understand that phases typically overlap, so while wrapping up the first phase, the second phase may have started.

If you have any questions regarding this document, please contact your SunGard Project Manager.

A. Initiation. During the Initiation stage, the project team is finalized, a project plan is completed, and the hardware/platform status is reviewed. The project managers and team leads for both parties are identified and allocated to the project. The other functional team members should be identified and begin preparation for their transition onto the project.

The customer will review policy issues and formulate a plan for completing any needed modifications to business processes or authenticate Scribe source documents (i.e., catalog information) for academic evaluation within DegreeWorks.

Specific Intimation tasks and anticipated deliverables include the following:

- Completed project plan with estimated timelines
- Determine project team assignments

B. Planning. During the Planning stage, the customer’s hardware and software environments will be staged for the implementation environment. The customer will deliver the authenticated source documents to the SunGard project manager.

Specific Planning tasks and anticipated deliverables include the following:

- Install DegreeWorks
- Scribe catalog by Ellucian

C. Implementation. During the Implementation stage, project launch and technical training occurs and is attended by the key sponsors of the project, by the customer and Ellucian project team participants, and by as many of the extended team and end users as appropriate. Customer will identify a sample population for use in block and functional review stages. Ellucian will deliver training in the scribing, audit review, and functional aspects of DegreeWorks. All catalog scribing and audits generated by DegreeWorks will be validated by the customer project team. The customer will identify desired web localizations for completion and will prepare for going live with DegreeWorks. Customer will finalize hardware configuration for production environment, and perform system administration tasks necessary for going live. Ellucian shall advise the customer in the necessary testing methodology that customer will perform on the systems prior to going live with the Baseline Component Systems in a production environment. This shall include functional unit testing of tasks and activities regularly performed in the system by the end users. Customer will finalize business protocol, including account administration, end-user support, and support interface with Ellucian.
Specific Implementation tasks and anticipated deliverables include the following:

- Project launch and product overview
- Technical training for customers system administrators and project team
- Scribe and audit training for campus team to facilitate understanding of audit output and validation of test population by customer personnel
- Web audit localizations developed from specifications provided by customer and delivered to test and production environments
- Orientation to support services
Creating Your DegreeWorks Campus Team

Team Roles and Responsibilities

This document is an outline of the recommended roles and their associated responsibilities within your DegreeWorks team. It is meant to guide you in assembling the appropriate skill sets and by following these recommendations it will ensure a successful DegreeWorks implementation.

If you have any questions about creating after this review please contact your SunGard DegreeWorks Project Manager.

Staff Associated to the Client DegreeWorks Functional Team

**Executive Sponsor**— This role has the ability and authority to reach across the campus and is viewed as the “go to” person for the client and SunGard Project Managers. If there are issues that might impact the ability to move the project forward and the issues are outside of the Project Managers authority (i.e., requiring staff outside of the core team to respond in a timely manner) the Executive Sponsor would step in and assist.

The Executive Sponsor typically has a mandate to implement DegreeWorks within a specific timeframe and will step in only on an as needed basis.

**Project Manager** – This role ensures all key milestones are met within the timeframe established in the project plan. It is expected that this role coordinates the tasks outlined in the Software License and Services Agreement. This individual works with SunGard implementation personnel to determine scheduling of tasks, software installation, coordinating staff to perform bridge extract definition, making sure source documents from which catalog requirements are Scribed are assembled and distributed properly, reviewing and/or distributing questions concerning requirements to be coded in Scribe, and engaging in weekly conference calls if appropriate to assure all parties are coordinated. The Project Manager should also oversee the coordination of testing, campus training, and campus deployment of the product, marshalling appropriate resources for those tasks.

Because DegreeWorks cuts across many traditional academic boundaries, the client Project Manager ideally has the respect of multiple constituencies within the campus community, the ability to provide results in a timely fashion, and the appropriate authority and/or management support to leverage staff and resources campus-wide, otherwise, the timelines established during our initial project launch meeting may suffer. A Project Manager well-supported by management has proven through time to be the most critical factor in the pace and success of DegreeWorks implementations. If this cannot happen, the Executive Sponsor role is essential.

**Scribe** – This team member should have extensive knowledge of degree requirements in order to write the Scribe language, assist with the web functional review, and maintain the Scribe requirements going forward. Whether or not SunGard personnel Scribed the initial catalog, the institution must dedicate staff to the scribing role. SunGard recommends at least one dedicated professional primary scribe plus one to two back-up staff. These individuals are typically associated with the Registrar’s Office or an area of academic advising. The scribing staff is trained on how to use the Scribe tool and the web audit output during the first training session. This prepares staff specifically for the critical two-step Functional Review process that constitutes the longest phase of the implementation. Functional Review includes an intensive requirement block review if SunGard staff were contracted to write the Scribe code, as well as
analysis of web audit output using specific student samples whether SunGard or the client wrote the Scribe. SunGard provides Excel spreadsheet templates to assist the client in the requirement block and audit review, issue logging, Go Live planning and web localization planning. Where sufficient scribing resources are not dedicated by the institution for the functional review process, the campus can expect project timelines and major milestones to slide, significantly extending the implementation process and delaying product deployment on campus. Additionally, scribing expertise learned in training will deteriorate, resulting in the need for additional staff training. Focus on the functional review process keeps scribing skills sharp and ready for requirement block maintenance, and keeps the implementation process on schedule.

Over time, the scribing commitment should fall from 50-100% at the front end of the project to much less as the campus moves to maintenance mode (typically 25%-50% depending upon how extensively curriculum requirements change from year to year and the size of the institution) Back-up scribes are essential to mitigating disruptions in academic business in the event of staff turnover, vacation or sick leave.

Additional Key Roles on the DegreeWorks Functional Team

Many institutions draw their core team and Scribe(s) from the following existing campus roles. This is proven success. If an institution does not intend to have their Scribe(s) staff come from any of these areas, it would be key to at least have them on the core team in advisory roles

**Registrar** - Oversees coordination of degree analysts, business flow, and exception management.

**Degree Evaluator**- Ensures automated degree audit performs graduation evaluations appropriately and considers all relevant institutional requirements in it’s evaluations of the students progress towards graduation

**Academic Advisor** – Contributes to the look and feel and layout of the audit. This person or persons might lead or greatly assists in the development of supportive material for student/faculty/staff training.

**Curriculum Representative**- Maintains or is aware of curriculum changes for the institution and communicates with the Scribe for future maintenance.

Client DegreeWorks Technical Team

On the IT side, responsibilities include providing a server on which to install the DegreeWorks software, as well as required 3rd party tools. There are typically daily standard maintenance tasks at the beginning for the IT support staff, including (but not limited to) action file review, extract scheduling, and system back-up. The details of system administration and DegreeWorks operations are addressed during the Project Launch/Technical Training, which IT staff are required to attend. Up front, the time commitment of IT staff should be on demand and as needed, and the System Administrator should attend all functional trainings to both assist the functional users and understand the DegreeWorks architecture at a deeper level.

**System Administrator/Database Administrator** - Database, server, and operating system management and maintenance. This role coordinates software updates with the functional team, ensures the proper running of the student and other data extracts from the existing SIS and assists with software problem resolution when necessary. Monitors PC applications and Web access.
Network Administrator/ Web Coordinator - Network management, Security/log-on authentication through portal, web server configuration, localizations maintenance