

Project Charter & Scope Statement

Automating No-Show, Stop-Attends, and Course Reinstatement Processing and Notification

Rider University

August 2024

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# Project Purpose and Justification

Rider University has an opportunity to automate and improve manual student no-show and stop-attends processing, communication, and reporting. While the University is not required to track student attendance, we are required to track no-shows and students who stop attending classes to that we can comply with federal regulation for the return on Title IV funding. The University is audited annually to determine compliance with this provision.

**Topics to include based on Governance Structure**: Business needs, Associated Business Process(es), Expected outcomes, Efficiency/Cost savings, Regulatory/Compliance, Alternatives considered

**To be completed by:** Demand/Project requester

## Funding Source & Personnel investment

No additional software purchase is required. Experience Intelligent Processing (EIP) is currently available with our Ellucian Experience module. Banner Communications Management (BCM) is available for use. Ellucian resources may be required to update existing Cognos reports and implement EIP. There may be some limited investment in training staff to configure and use EIP if Ellucian contract hours are not available.

## ROI Measurement

ROI will be measured through the following ways:

1. Reduction of volume of manual processing of student records
2. Timely status updates to students, faculty, and deans’ offices
3. Introducing faculty self-service for course reinstatement
4. Meeting complete and timely federal compliance

**To be completed by:** Demand/Project requester

# Project Scope Statement

The project will focus on the following areas.

1. Review existing process flows. Document changes to old documentation to reflect current processes.
2. Create new process flows to reflect best practice and optimal operations.
3. Using existing reporting tools, expand report parameters on existing reports to allow for the creation of multiple report views and timely distribution.
4. Implement Banner Communications Management for automated student and faculty notifications based on actions or lack of action in Banner.
5. Automate Banner processing based on other Banner actions.
6. Schedule SZPMINH via UC4.
7. Implement the Ellucian delivered EIP to create a self-service card for faculty to reinstate students’ registrations when necessary.
8. Assess the use of EIP to replace the use of mid-term grade reporting for the no-show and stop-attends processing.

**To be developed by:** Initially by Demand/Project requester. Refined by both OIT Apps Director and the requester as needed.

## Project Exclusions

1. Phase 2: Since EIP is not yet enabled in Ellucian Experience for Rider, we will table that feature to replace certain portions of the existing workflow and revisit the EIP implementation at the end of the project.

**To be developed by:** Initially by Demand/Project requester. Refined by both OIT Apps Director and the requester as needed.

## Project Timeframe

The following timeline has been proposed. The actual schedule will be developed and maintained by the project management team including the Client Project Manager and with oversight by the Client Executive Sponsor. The table below highlights budgeted time for each milestone in the Weeks column, with example date times in superscript font.

Each milestone must be accompanied by a deliverable. This table is eventually used as a basis to develop Work Packages and Work Breakdown Structures (WBS) and tasks.

|  |  |  |
| --- | --- | --- |
| **Milestones & Deliverables** | **Proposed Timeline** | **Comment** |
| Project Kick-off and Approval  Deliverable: Project Charter & Scope | Week 1 | Kick off call 08/15/2024  Project Charter completed by EM 09/04/2024 |
| Pull any old documentation from prior projects. | Week 1 | [Received 07-24-2024](https://drive.google.com/drive/folders/1VQBfCjNzhOMbpJFThJuaHrzdJjEhM4FO?usp=drive_link) |
| Meet with deans’ offices to discuss academic processing. | Week 2 | Complete 08-21-2024  Determined that staff prefer a daily Cognos report than constant Banner Workflow emails |
| Review old documentation and determine differences to current process. | Week 2 | Complete 08-22-2024 |
| Optimize future business process and finalize new workflow | Weeks 3 & 4 | Complete 09-04-2024 |
| Identify areas in workflows that require automation | Week 4 | Complete 08-22-2024 Refer to [No Show and Stop Attends New Workflow](https://drive.google.com/file/d/1dVFIgoI0DMOJD6d--VTZtPgsF-DaG3Vo/view?usp=drive_link) (pdf) |
| Determine how to control for changing start/add/drop/end dates for each term | Week 5 | Can GTVSDAX be used to control the date variables for each term/academic year? |
| Detail rules for reinstate process that require automation | Weeks 6-8 Due 09-30-2024 |  |
| Review/revise communications to use in BCM | Week 6 | Complete 09-03-2024 [Link to new email content](https://drive.google.com/drive/folders/1pZFxOYyAaN5orMu47hq44GTfAXMXrAlM?usp=drive_link) |
| Review/revise existing Cognos report for Stop Attends | Week 6 Due 09-15-2024 | Review complete; changes shared with Ellucian for implementation 09-03-2024 [Stop Attends report changes](https://docs.google.com/document/d/1fyZU_zwL2aqukMnoQzbB1LSPhdtwTNHQ-1F8mS93Bz0/edit?usp=sharing) |
| Review/revise existing Cognos report for No Shows | Week 7 Due 09-30-2024 | Review complete; changes shared with Ellucian for implementation 09-04-2024 [No Show Report Changes](https://docs.google.com/document/d/1IsTvOti5SrfzSe-vz6WkHuc46VuTRcSAza_jMZltZMo/edit?usp=sharing) |
| Create Cognos report views and schedules | Schedule upon report change completion |  |
| Detail rules for No Show Process that require automation | Due 10-15-2024 |  |
| Build automated reinstatement process in Banner, including communication | Due 10-31-2024 |  |
| UAT for the reinstatement process | Due 11-08-2024 |  |
| Build automated No Show process in Banner, including communication | Due 11-30-2024 |  |
| UAT for no-show process | Due 12-06-2024 |  |
| Move no-show and reinstate process to PROD | Due 01-01-2025 | PROD pilot during J-Term with full campus use for Spring 2025 |
| Revisit EIP implementation for changes to stop attend processing and replacing midterm grade reporting | Spring 2025 semester | PROD pilot during Summer 1 and 2 with full campus use for Fall 2025 |

**Note:** Shaded rows denote there is some overlap and some work can proceed in parallel

**To be developed by:** Initially by Demand/Project requester. Refined by both OIT Apps Director and the requester as needed.

Project Stakeholders

| **Role** | **Person** | **Contact Information** |
| --- | --- | --- |
| **Executive Sponsor** | Jennifer Therien | [jtherien@rider.edu](mailto:jtherien@rider.edu) |
| **Co-Sponsor** (if applicable) | Sue Stefanick | [stefanic@rider.edu](mailto:stefanic@rider.edu) |
| **IT Project Manger** |  |  |
| **Technical Trainer** |  |  |
| **IT Subject Matter Expert** |  |  |
| **Project Team Member(s)** |  |  |
| **Subject Matter Expert** | Sue Stefanick | [stefanic@rider.edu](mailto:stefanic@rider.edu) |

**To be developed by:** Initially by Demand/Project requester. Refined by both OIT Apps Director and the requester as needed.

## Project Deliverables

The table below describes the project Deliverables and the roles of OIT and Client in producing them. The letter "R" designates Responsibility and ownership for delivering the tasks successfully. The letter "S" designates Support of the work with resources or time; that are committed to achieving completion.   
  
This should, at minimum, align with Milestones and Deliverables section of Project Timeframe section above.

| **Deliverable** | **OIT** | **Business Units** |
| --- | --- | --- |
| Project Charter and Scope | R | R |
| Pull any old documentation from prior projects. | R |  |
| Meet with deans’ offices to discuss academic processing. |  | R |
| Review old documentation and determine differences to current process. | S | R |
| Optimize future business process and finalize new workflow | S | R |
| Identify areas in workflow that need to be automated. | S | R |
| Determine how to control for changing start/add/drop/end dates for each term | R | S |
| Detail rules for Reinstate Process that require automation | S | R |
| Review/revise communications to use in BCM |  | R |
| Review/revise existing Cognos report for Stop Attends | R | R |
| Review/revise existing Cognos report for No Shows | R | R |
| Create Cognos report views and schedules |  | R |
| Detail rules for No Show Process that require automation | S | R |
| Build automated reinstatement process in Banner, including communication | R | S |
| UAT for the reinstatement process | S | R |
| Build automated No Show process in Banner, including communication | R | S |
| UAT for no-show process | S | R |
| Move no-show and reinstate process to PROD | R |  |
| Revisit EIP implementation for changes to stop attend processing and replacing midterm grade reporting | R | R |

**To be developed by:** Initially by Demand/Project requester. Refined by both OIT Apps Director and the requester as needed.

## Project Deliverables Acceptance Criteria

Project Deliverables are reviewed and approved by the OIT Client Manager and Client Executive Sponsor. The project success criteria have been met when the client has validated that all deliverables have been completed and approved or allows exceptions, or both parties mutually agree on completion. At minimum this project should: <Describe minimum viable product>.

# Project Constraints and Assumptions

## Constraints

* Enrollment Management will test functionality with faculty members from each college, as identified by the deans’ offices.

Technical work for this project will be prioritized with existing IT projects, any additional high priority projects that are approved and completion required during this project timeline may have an impact on this project.

## Assumptions

* Data in test environment is usable and relevant
* The University will implement EIP functionality.

## High Level Risks

* Overall risk for this project is low, since the manual process can always serve as the backup.
* Project schedule is dependent on term start dates, add dates, drop dates, withdraw dates, and end of semester dates as published in the academic catalog and must launch in conjunction with those posted dates.