

11-30-2016

Integrated Cluster Model IT Functional Requirements: Presentation

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Humer, Ross and Gagnon, Larry, "Integrated Cluster Model IT Functional Requirements: Presentation" (2016). *Clusters*. 68.
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Integrated Cluster Model IT Functional Requirements

IT Enablement of the PSU Transformation

- **Outline the Challenge - 45 minutes**
- **Develop an Action Plan – 45 minutes**

November 30, 2016

November 30, 2016 Meeting Agenda

- **Outline the Challenge**

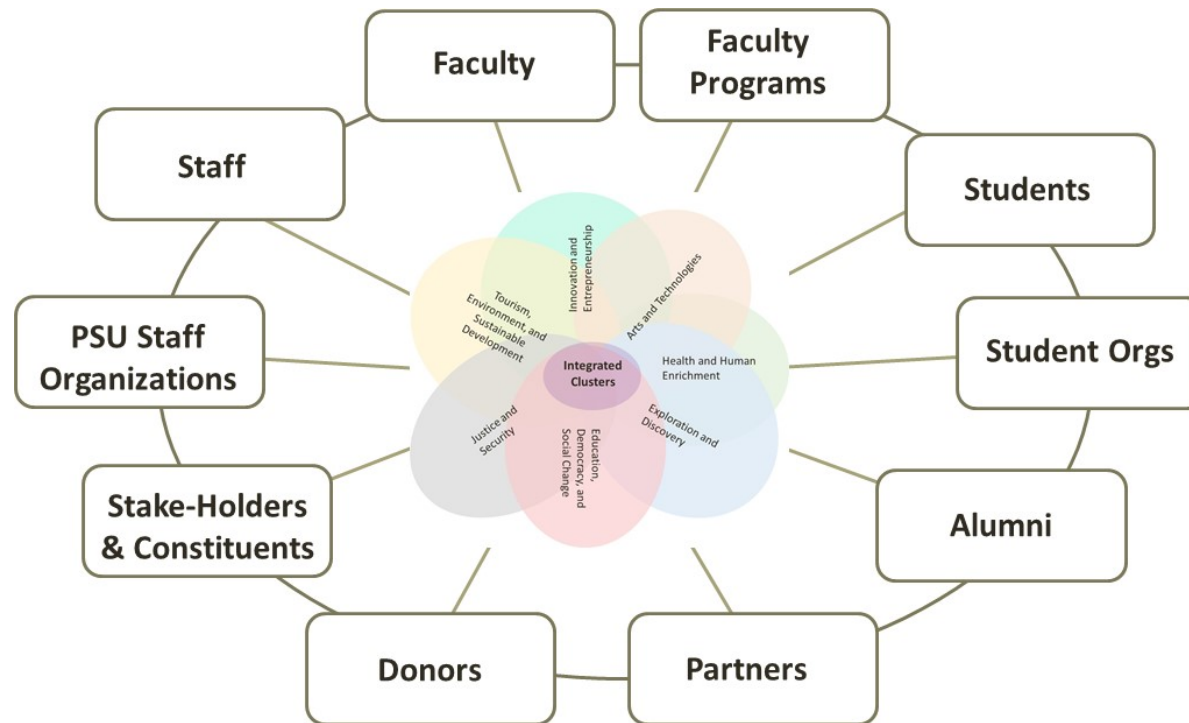
- Describe the IC Model Framework Objectives
- Summarize Current IT Limitations
- Review IT Functions, Data Linkages, and key Processes
- Identify Inter-dependent Adjacent Center Operations

- **Develop High Level Project Work Plan**

- Requirements
- Resources
- Milestones & Assignments

Integrated Cluster Model IT Challenge

Enable the Transformational PSU IC Model with Extensible IT Architecture & Capabilities



DRAFT Material for Discussion Purposes

Integrated Cluster Model Requirements

Build a Vibrant IC Community

- *Compelling Missions*
- *Engaging Activities*
- *Real World Projects*
- *Recognition*

Engage People

- *Faculty*
- *Staff*
- *Students*
- *Partners & Constituents*

Evolve Academic Content

- *FYS*
- *Themed GenEd*
- *Open Lab Concepts*
- *Curricula Evolution*

Coordinate Academic Disciplines

- *Faculty*
- *Curricula*
- *Student Enrollment*
- *Staffing*

Manage IC Financials

- *Budgets*
- *Expenses*
- *Assets*
- *Investments*

Enhance Communications

- *Intra/Inter-Cluster*
- *Across PSU Communities*
- *External Partners & Constituents*
- *Prospective Students*

IC Model Operational “Pain Points”

PSU IT capabilities provide limited functionality in the following areas:

- ❖ **Access** - Provide Easy & Consumable Access to IC-related Information
- ❖ **Topics** - Engage in dynamic topical IC-related Discourse & Development
- ❖ **Projects** - Ability to Define, Create, Launch, Manage & Report on Projects/ Activities
- ❖ **Engagement** - Involve Faculty, Staff, Students, & External Partners/ Constituents
- ❖ **Events** - Schedule and Promote current and future IC-related events
- ❖ **People** - Create Personnel Inventories of specialties, interests & affiliations
- ❖ **Curricula** - Evolve Curricula to Inter-disciplinary, Open Lab Concepts
- ❖ **Assets** - Align financial and query/locate/assign physical assets
- ❖ **Administration** - Create IC Administrative Data, Analysis, & Reporting

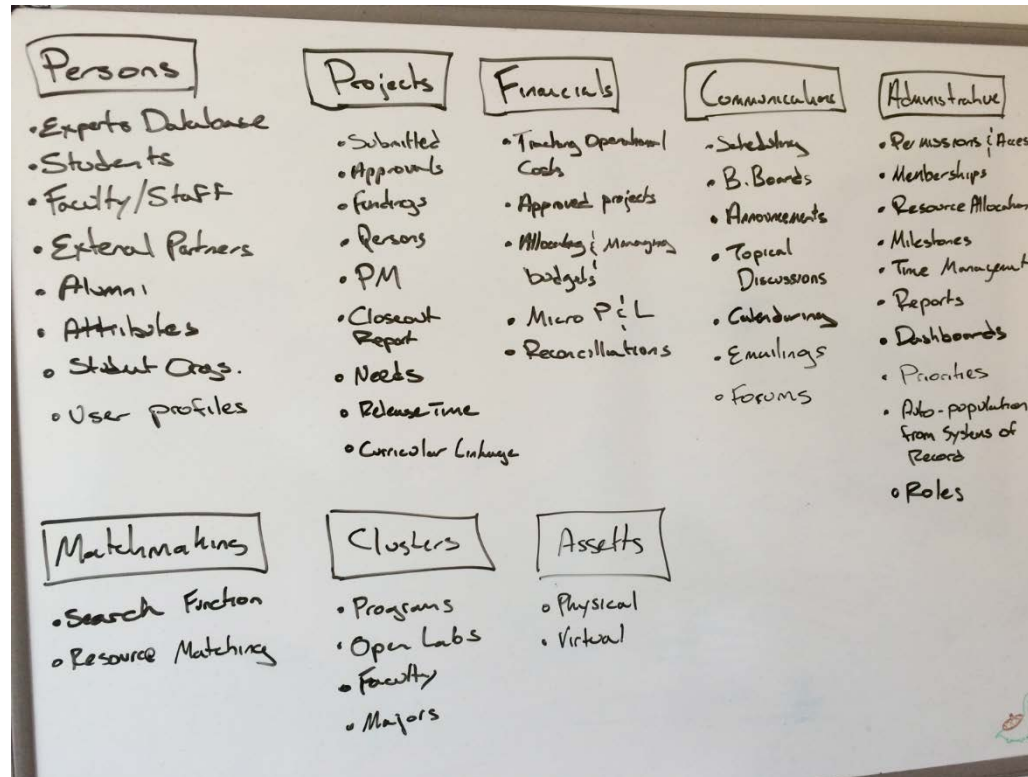
IC Model Communications & Data Exchange

Dynamically Link & Present Data, Information, & Media to

Enable Communications Effectiveness & Operational Efficiency

Data Linkages

- Persons
- Projects
- Financials
- Administration
- Matchmaking
- Clusters
- Assets



Cluster Communications/ Data Exchange



*Info Access, Search, Retrieval
And Communications*

"Push" information Updates

- Posted Materials & Documentation
- Topical Exchange & Collaboration
- Event Scheduling & Calendaring
- Opportunity Advertising & Registration

Tiered User Access

- Overview/ Summary Information
- Detailed Resource information
- Expert/ User-specific information
- Analytic Queries

Role-Based User Categories (*Permission Access*)

- IC Guides/ Office of AA
- Faculty
- PSU Staff
- External Partners
- Matriculated Students
- Prospective Students
- Marketing/ PR
- Alumni Relations

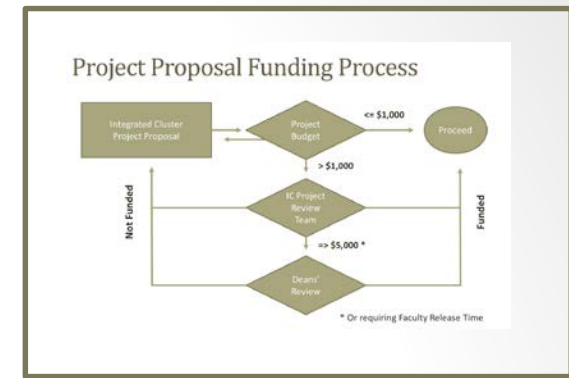
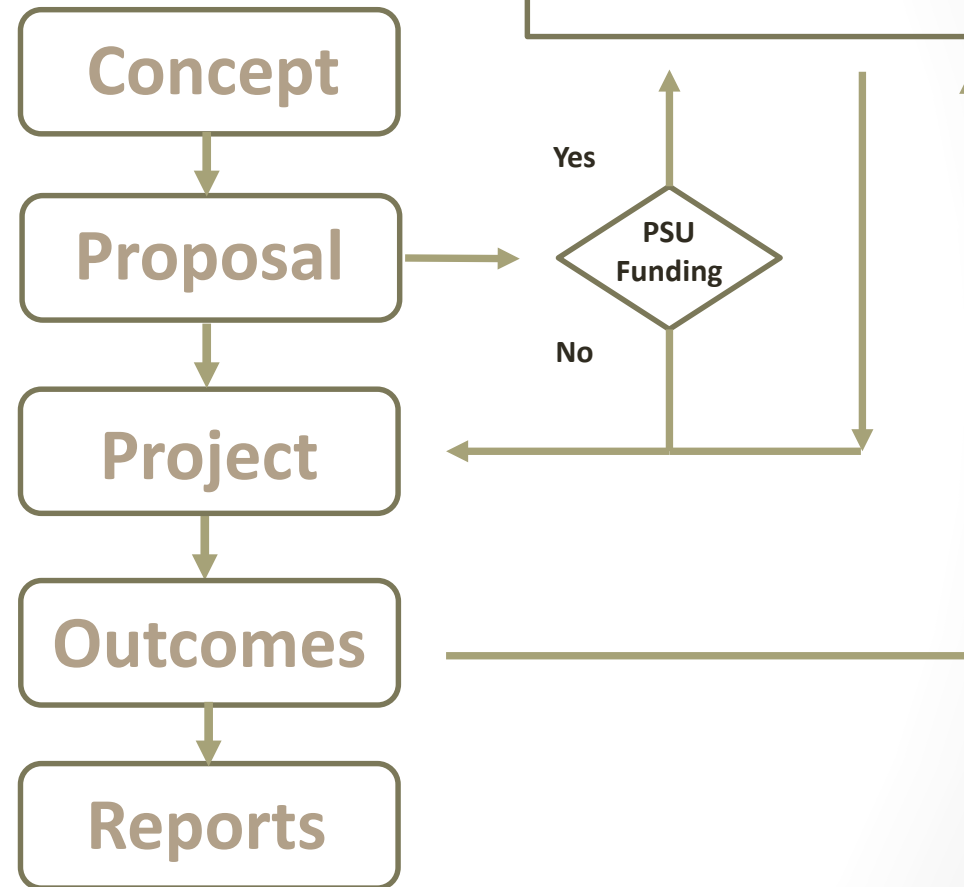
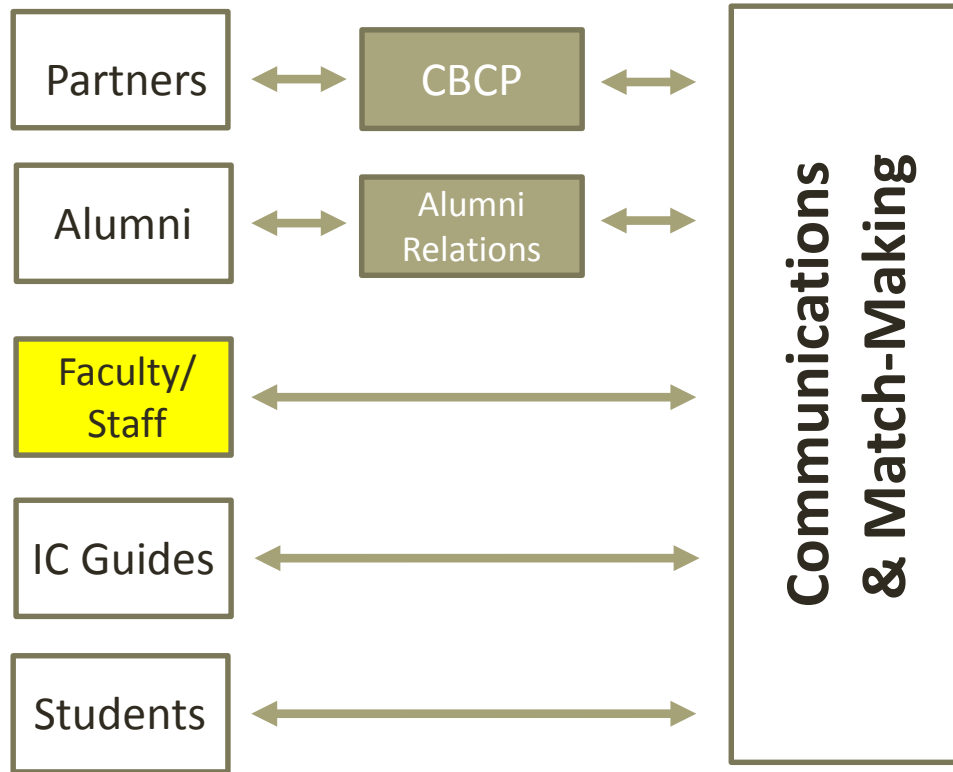
User-Friendly & Relevant Interface

User Interface

- Engaging Format
- Ease-of-use
- Relevant Content
- Dynamic Data Retrieval



IC Project Processes



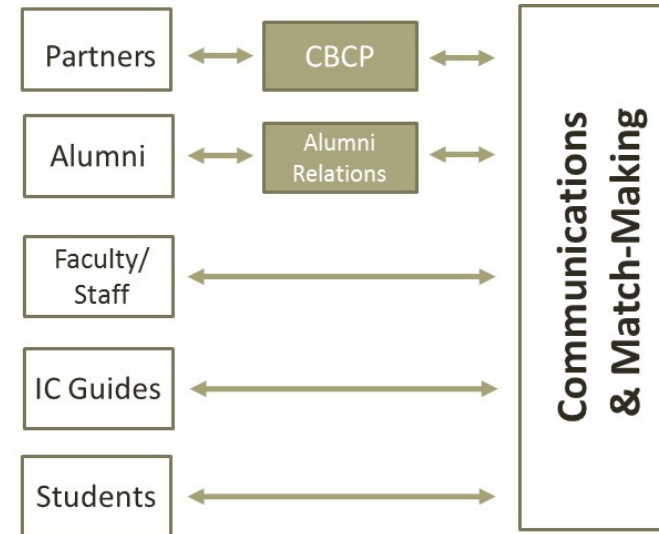
Collaborate to Engage and Develop Compelling Student-Centric, Outcomes-based Interdisciplinary Projects

Capture Data, Information, and Exhibits from Incubation to Completion for Internal/External Communications

Match-Making Functionality

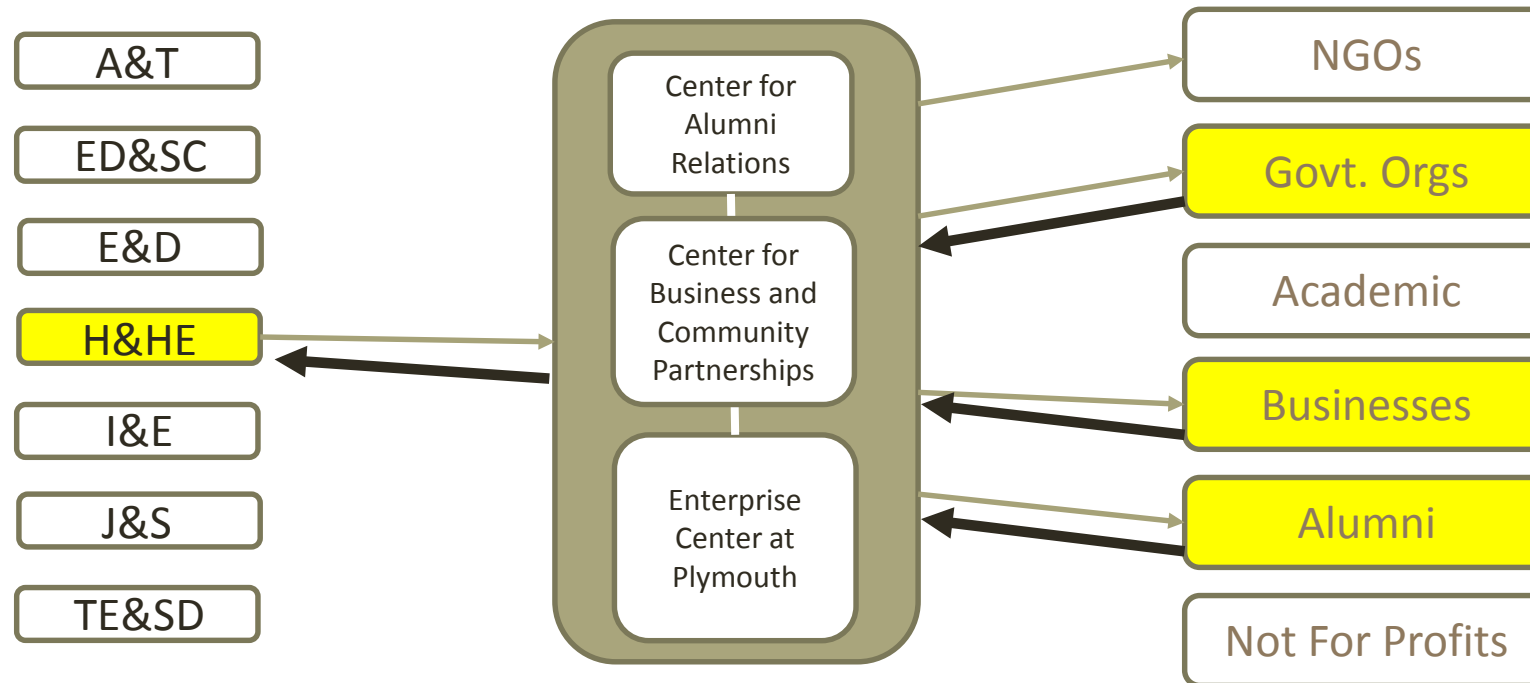
“Job Board” Posting and Reservation/Assignment Capability

- **Innovate Ideas**
 - Create & Capture Ideas
 - Publicize & Evolve the Concepts
- **Create Projects**
 - Evolve into Proposals
 - Document as Projects
- **Build the Teams**
 - Advertise for Resources
 - Confirm Selection (“Registration”)



External Linkages – Engagement Model

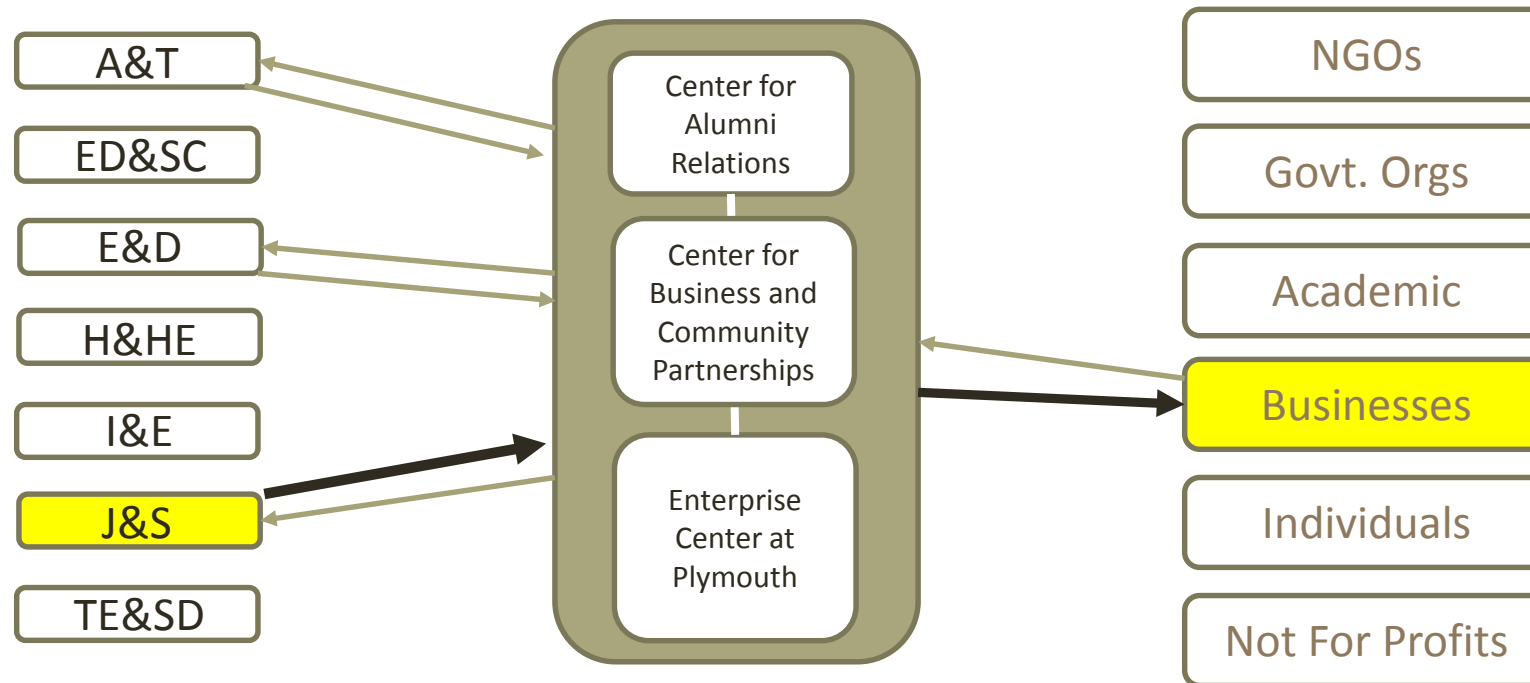
Example: IC Project Seeking External Stakeholders/ Participants



Note: This process Does Not Preclude Direct Interactions

External Linkages – Engagement Model

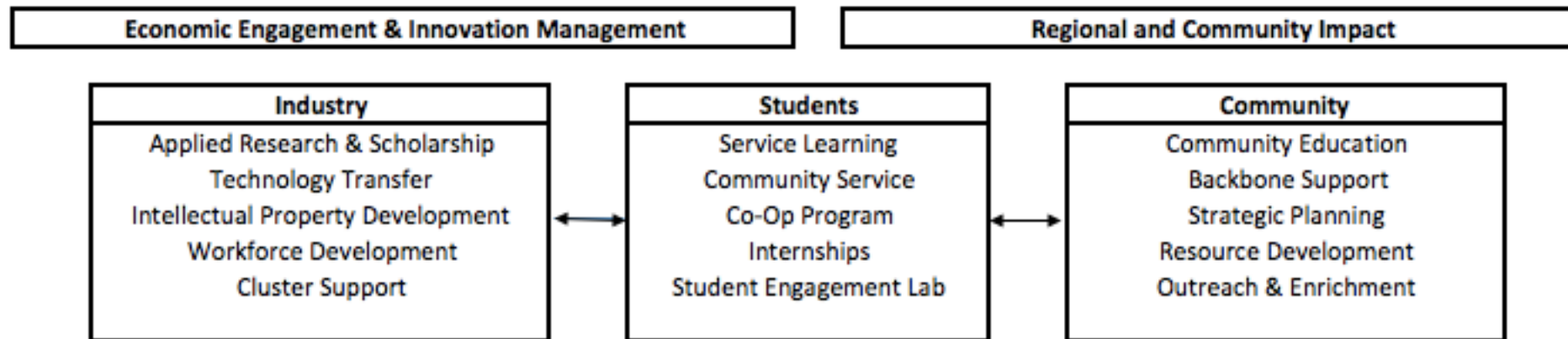
Example: Business Request for an Integrated Cluster Project



Note: This process Does Not Preclude Direct Interactions

Center for Business and Community Partnership (CBCP)

The Center for Business and Community Partnerships



Collaborative partnerships between businesses, students, community partners, & faculty create intellectual, social, cultural, scientific, and economic outcomes

IC Model – IT Plan Development

Topics for November 30th Planning Meeting

- *Create an IT Project Plan*
- *Assign Resources*
- *Create A User Interface Mock-up*
- *Define Functional Requirements*
- *Select IT Solution System/Elements*
- *Outsourcing RFP*
- *Develop & Deploy Applications*

Priority Functional Needs

- Cluster Projects
- Communications/ Scheduling
- People Profiles

User-Friendly Interface

- Engaging Format
- Ease-of-use
- Relevant Content

Backup Charts Follow

IT Enablement – Current Tools

- **Wordpress – Integrated Clusters Website including blog (behind firewall)**
- **Office 365 groups – one per cluster**
- **Yammer**
- **Sharepoint – guides only (Moodle site archived)**
- **Microsoft Word (embedded Excel) – project proposal forms**
- **Qualtrics – personnel profile and Quick Ideas forms**
- **Microsoft Excel – integrated cluster calendars and Forms extracts; Faculty IC Master list**
- **Marketing Cloud/Salesforce – Transformation Information emails**

On-Line Tools & Forms

Forms

Here are the forms you may need to complete when working with the integrated clusters.

Personal Profile + Interest survey – complete this survey if you are faculty or staff to tell us about your interests and skill sets

Project Proposal forms – complete these forms for projects taking place inside integrated clusters

Quick Idea form – complete this form if you are not quite ready to submit a project proposal but you have an idea that you would like to capture and share.

Qualtrics Surveys:

- Personal Profile & Interest Survey
- Quick Idea Form

Downloadable Forms

1. **Project Proposal Planning Guidelines**
2. **Project Proposal Process and Project Form**
3. **Project Proposal Budget Form**

For Projects Not requiring Funding

PSU is in process of building an inventory of all inter-disciplinary projects that align to the Integrated Cluster Initiative. Faculty or staff who have active or proposed projects that **do not require IC funding** are strongly encouraged to complete and submit the following form:

1. **Project Proposals Not Requiring Integrated Cluster Funding Form**

Word Documents:

- Proposal Planning Guidelines
- Proposal Process and Project
- Proposal Budget (Embedded Excel)
- Proposal (Non-Funded)

Sample Reports



Project Tracking
Register



Activity Code
Tracking



Personal Profiles
& Interest

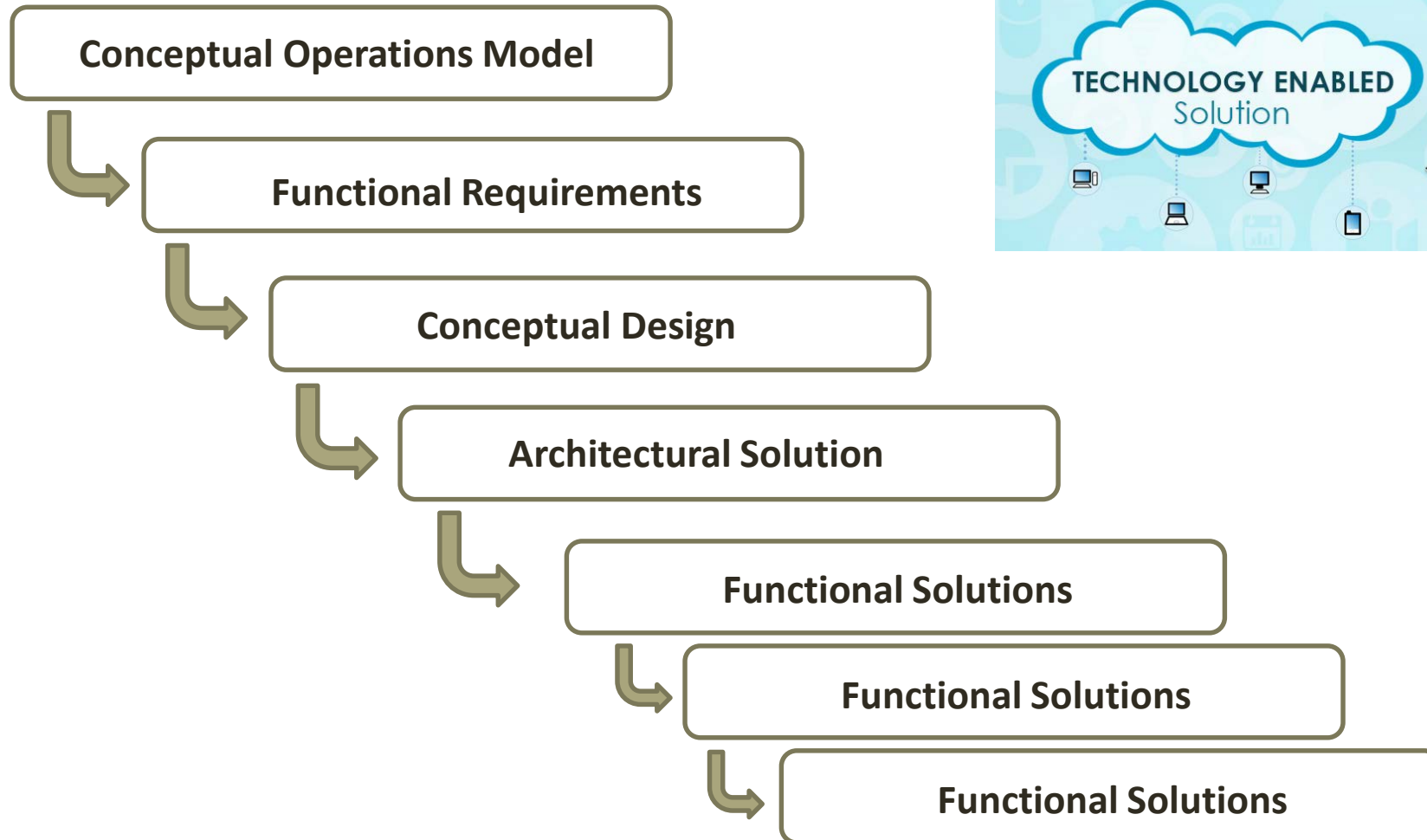


Faculty Master
List



IC Initiative
Progress Report

IC Operations IT Development



IC Model Operational IT Concepts

Functional Requirements

- Role-based Access (set permissions)
- Personal Preferences (academic; skills; interests; multiple IC affiliations)
- Searchable Resources (meta-tagged)
- Opportunity Advertising (match-making)
- Opportunity Reservation (match-making)
- Interactive Commentary/ Discourse
- Reusable Content (internal/External PSU)
- Single “Point of Truth” Data (“Net New” & data element relationships)
- “Push” Content (Make Relevant topics Visible)
- Tiered Resources (Summaries and Details)

Role-Based Information Requirements

- ❑ *Access to Common Information & Data elements exists across most Roles*
- ❑ *Each Role may need the Information/Data presented in a specific depth & format*

	People	Projects	Activities	Resources	Topics	Financials
IC Operations	X	X	X	X	X	X
IC Guides	X	X	X	X	X	X
Faculty	X	X	X	X	X	
PSU Staff	X	X	X	X	X	
Students	X	X	X		X	
Partners	X	X	X		X	
Marketing/ PR	X	X	X		X	
Alumni Relations	X	X	X		X	

Cluster Communications

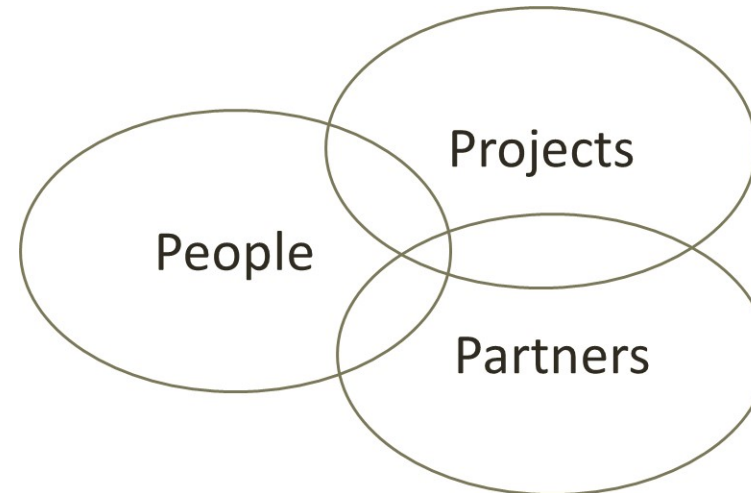
- **Info Access, Search, & Retrieval**
- **Push information Updates**
- **Topical Exchange & Collaboration**
- **Event Scheduling**
- **Job Board Advertising & Registration**
- **Intra-Cluster**
- **Inter-Cluster**
- **Academic Affairs**
- **Campus Communications**
- **External Communications**

Data Linkages & Relationships

People: Faculty; Staff; Students

Projects: Funded & non-Funded

Partners: External Orgs & Alumni

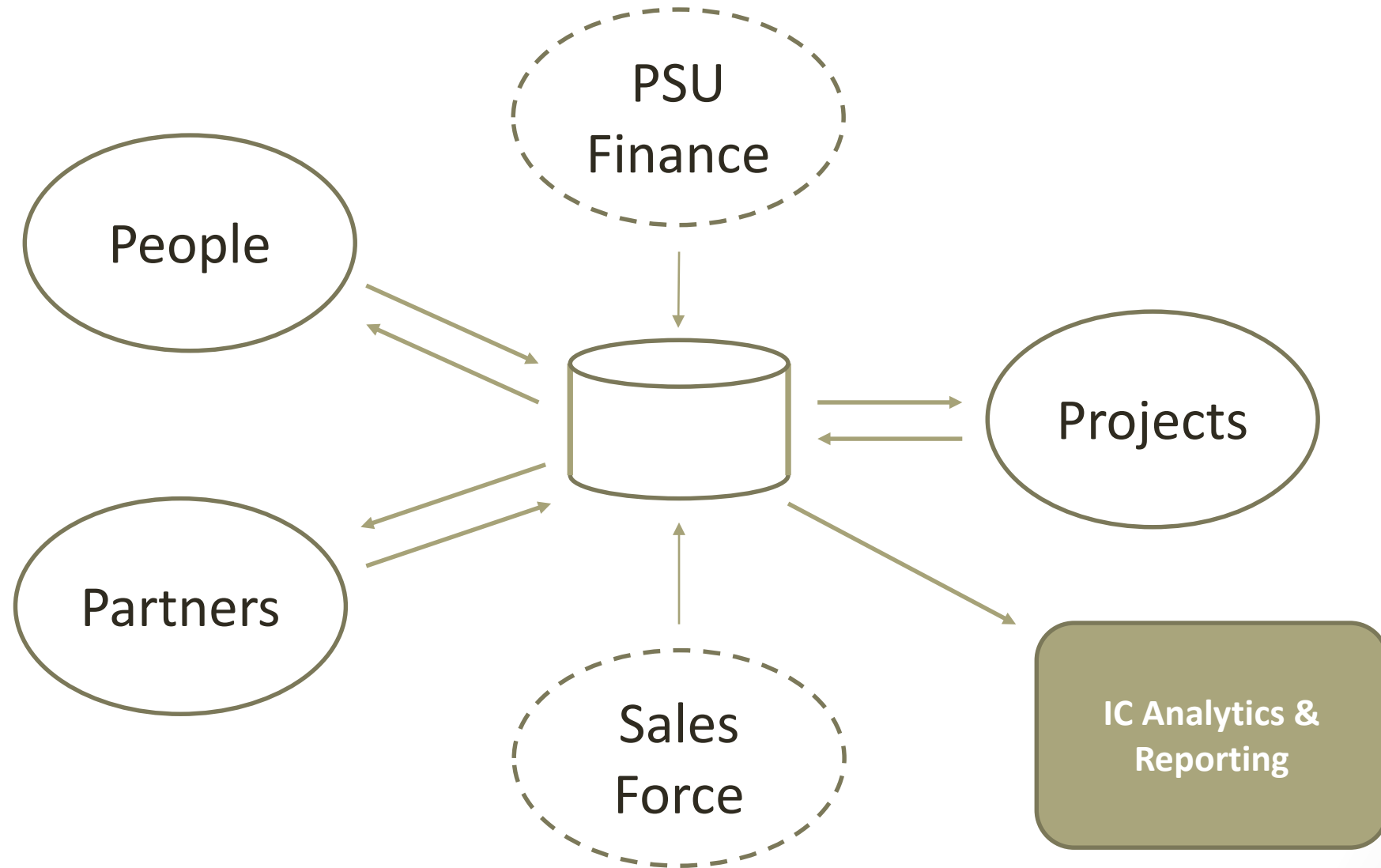


People – Projects: Individuals will want to engage on projects; projects will need to find people

People – Partners: Relationships can be a source of future activities and engagement

Projects – Partners: Projects need to engage Partners; Partners will seek collaboration

IC Data Relationships; Existing & “Net New”



Primary Data Records

People

Status (F/S/S)
Academic Focus
Personnel Interests
IC Affiliations
Project Activities
Project Ideas
Partner contacts

Projects

Status (Active/Proposed)
Open Status (Open/Closed)
Funding (Yes/No)
Completed Forms (G/P/B)
Champion
Progress

Partners

Status (Active/Interested)
Project Involvement
Type (Org; Alumni; Academic)
PSU History
Assigned PSU Contact
New/Active Requests

Financial

IC Activity Funding

- Budgeting - IC
- Budgeting - Deans

Activity Debits

Sample Data Queries

IC Queries

Project Status *

- People engagement (by type)
- Project Champions
- Partner Engagement
- Project Milestone status
- Funding Status

People Status

Activity Planning Calendar

People Queries

Project Summaries

- Active vs. Planned
- Open vs. Closed

IC Profiles

- Mission Statement
- Activities
- People
- Partners

Personnel Profile (update) Calendar

Project Queries

Potential People

- Faculty
- Staff
- Students

Potential Partners

- Alumni
- Government
- NGO
- Academic
- Others

People Commitment Status

Activity Planning Calendar

* Current vs. Proposal; trend over time

Potential Use Cases

What is going on w/r/t Integrated Clusters? This is a primary question which should reference easy to use materials (not FAQs) in a tiered format (basic information with drill-down to more details of structure, terms, processes, etc.)

How am I involved in an IC? Faculty will be assigned academic discipline IC affiliation and chose one or more personal interest IC affiliations; staff can/should select primary and secondary interest affiliations. Self-service form (including add/drop except for faculty home assignments) available to provide more detailed personnel profile

What is going on a specific IC? Tiered information starting with a Mission Statement, activities calendar, Guide contact information, departmental alignment, project portfolio, etc. This can be extracted from the central database and dynamically updated

How can I get involved? Menu of options to look for open projects, IC activities, contact information

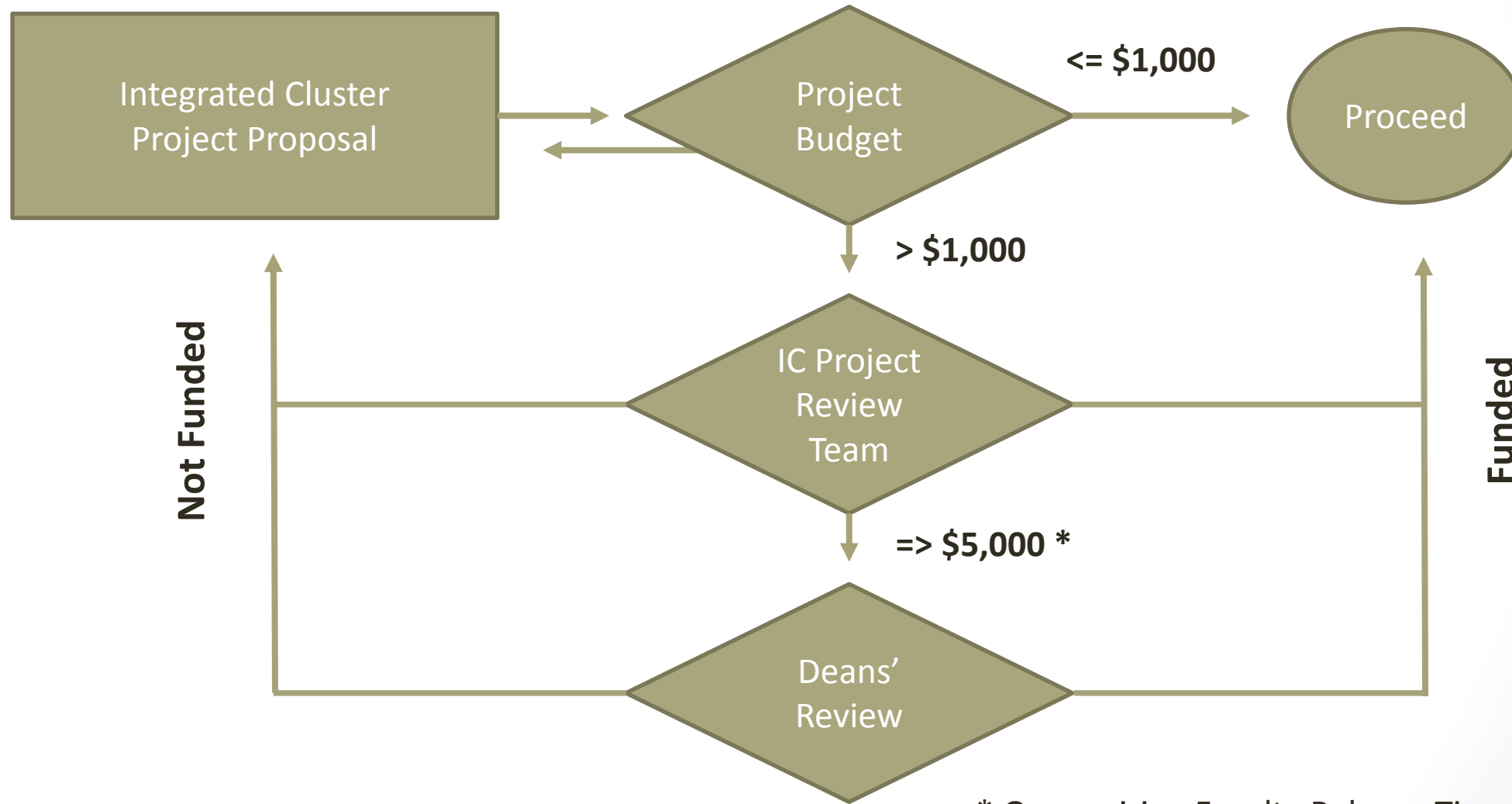
What is going on for my projects? Specific query of the more detailed data and action registers for projects where the individual has committed to participate (and has been accepted). Again, the data is centrally housed and dynamically updated through the Microsoft Planning App.

I have an idea. On-line simple form to capture any idea in any form; links to the on-line project proposal and project planning attribute guideline forms

I have a question. On-line capability to post a question to receive an individual response

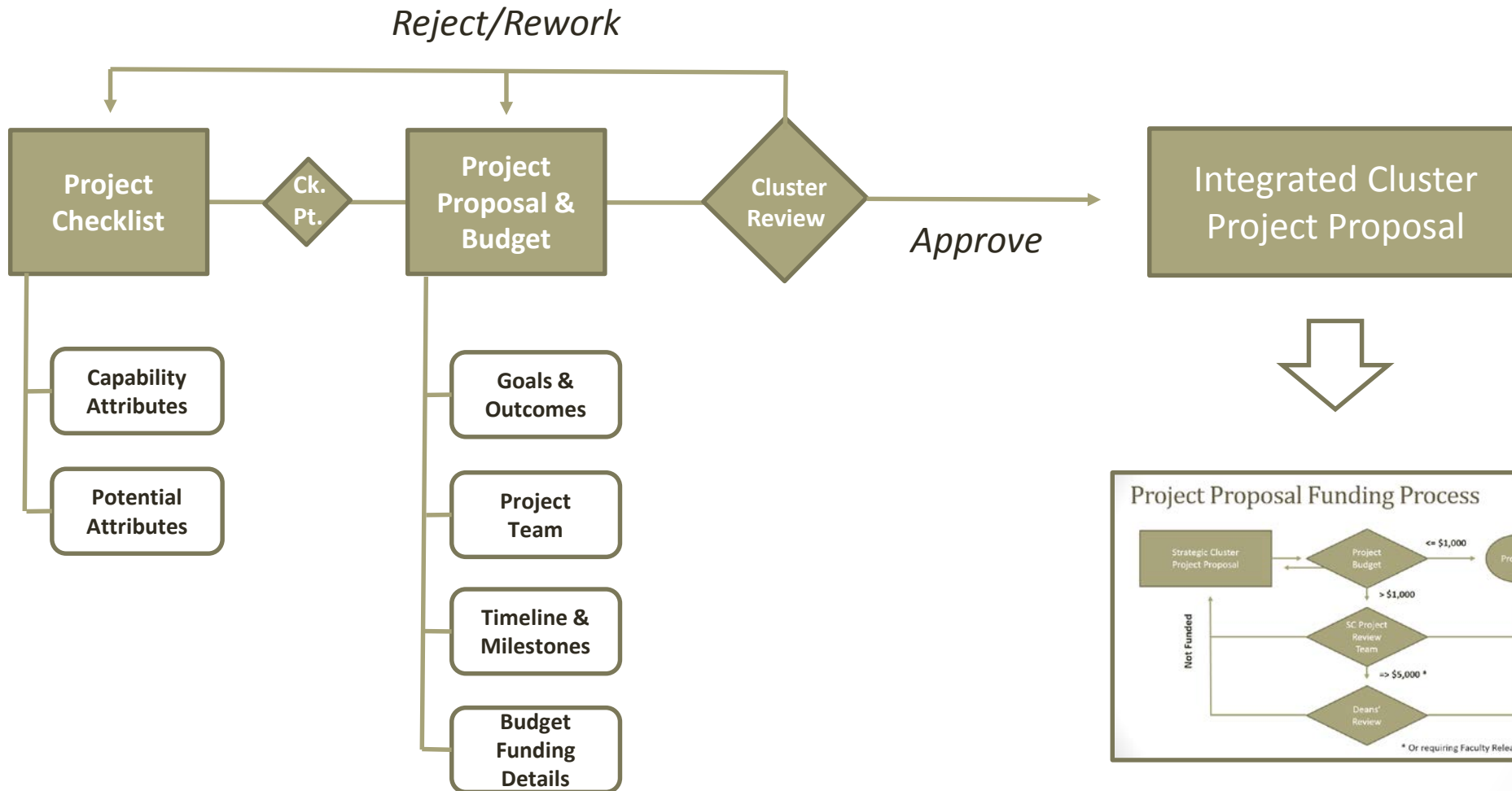
Who can engage with my project? Internal PSU and Partner potential participants

Project Proposal Funding Process



* Or requiring Faculty Release Time

IC Project Proposal Development



CBCP - Internship Model

Career Services (CS) administered internships for:

- Business
- Childhood Studies
- Dance
- English (Writing)
- Environmental Planning
- Geography
- Graphic Design
- Music & Theatre
- Women's Studies

CS placed and managed approx. 30
interns for credit per term in graded
capstone courses (1.75 staff
dedicated)

This customized model is no longer
sustainable

New Model:

- Expand capacity (add majors and 'clusters')
- Keep up quality
- Increase community engagement with special projects (embedded into curriculum)
- CBCP maintains central job postings and internship positions open
- Instructor placement process comes to an end
- Students are taught job search techniques
- Develop series of pre- internship placement workshops to deliver to students and teach the craft of job development and presentation
- End of site and supervisor visits
- Potentially change credit #s (make it variable)?
- Pass/No pass option?

A work in progress