



Scheduling Request Strategy

Last Revised:

3/21/2008

REVISION CONTROL

Document Title: CSU-CI Scheduling Request Strategy
Author: Joseph Dobzynski, Jr. – Department of Information Technology
File Reference: CSU-CI Scheduling Request Strategy - 2008.03.21 - Final Draft.doc

Date	By	Action	Pages
12/19/2007	Joseph Dobzynski	New Document	All
1/13/2008	Joseph Dobzynski	Finished Rough Draft for Prototyping and Peer Review	All
1/25/2008	Joseph Dobzynski	Updated with comments from Angela, Ana Rosa, Ginger	All
2/11/2008	Joseph Dobzynski	Updated with comments from ASG Team	All
3/12/2008	Joseph Dobzynski	Updated with final comments from ASG Team	All

Review/Approval History

Date	By	Action	Pages

Table of Contents

	Page
1.0 Purpose.....	4
2.0 Roles and Responsibilities	4
3.0 Communications.....	4
4.0 Process Diagram.....	5
5.0 Phase 1 – Planning & Analysis.....	6
5.1 Process Overview.....	6
5.2 Review Scheduling Request	6
5.3 Analyze Scheduling Request	6
5.4 File Scheduling Request Ticket	7
5.5 Deliverables/Milestones.....	7
6.0 Phase 2 – Installation & Testing.....	8
6.1 Process Overview.....	8
6.2 Schedule Request into HCITRS.....	8
6.3 Test Scheduling Request	8
6.4 Accommodate Issues	8
6.5 Deliverables/Milestones.....	8
7.0 Phase 3 – Implementation.....	9
7.1 Process Overview.....	9
7.2 Schedule Request into HCIPRD	9
7.3 Follow-Up with Module Lead	9
7.4 Deliverables/Milestones.....	9

1.0 Purpose

The CSU-CI Scheduling Request Strategy supports and coordinates all requests for recurring and nightly processes for our Finance, Human Capital Management, and Campus Solutions systems. This strategy encompasses analysis, form preparation, and scheduling to ensure each requested is ready for automated scheduling.

2.0 Roles and Responsibilities

Module Lead – The module lead is responsible for identifying the need for each scheduling request, working with the functional analyst to request the process, testing this request in a non-production environment, and providing updates/changes as necessary for each process once scheduled.

Functional Analyst – The functional analyst is responsible for analyzing each scheduling request, working with the module lead to request the process, supporting testing this request in a non-production environment, and assisting with any updates/changes as necessary for each process once scheduled. The functional analyst may be a member of ITS or a member of the department.

Technical Analyst – The technical analyst is responsible for scheduling each request in our non-production and production environments.

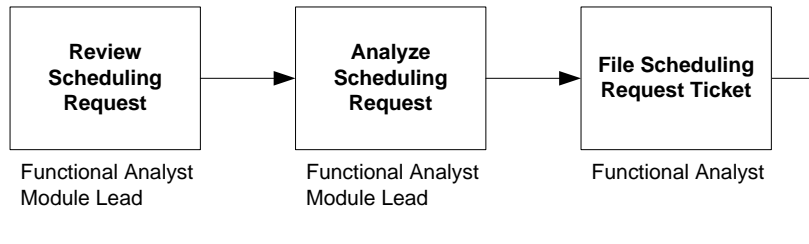
3.0 Communications

Scheduling Status Review – ASG will review all scheduling requests once a month for status updates as part of the weekly ASG Staff Meeting. This review will ensure no scheduling requests are forgotten in the process.

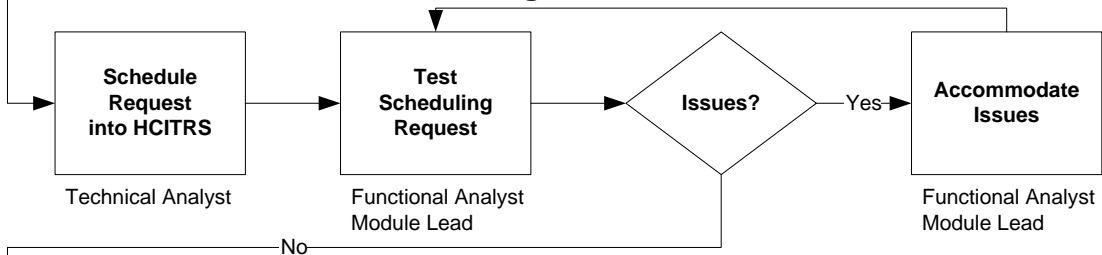
Scheduling Status SharePoint Page – ASG will use SharePoint to list all scheduling requests for updates outside of the weekly ASG Staff Meeting. This page will provide a single point of reference for all scheduling requests and links to the request forms. SharePoint is currently limited to ITS.

4.0 Process Diagram

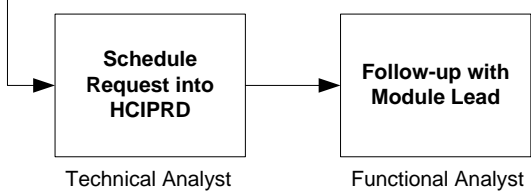
Phase 1 – Planning & Analysis



Phase 2 – Installation & Testing



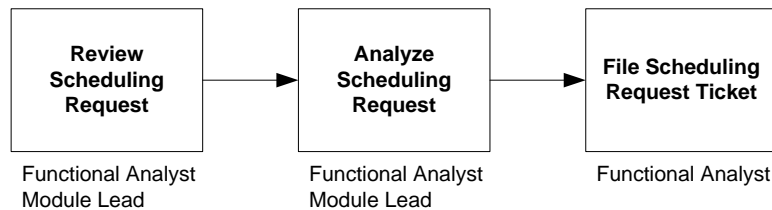
Phase 3 – Implementation



5.0 Phase 1 – Planning & Analysis

Phase 1 covers the planning and analysis of each scheduling request. The Module Lead and Functional Analyst will review the scheduling request to make sure the request is sound and worth pursuing. The Module Lead and Functional Analyst will then analyze the scheduling request and produce a Scheduling Request Form to describe the details of the scheduling request, produce testing scenarios, and compile any security impacts. The Functional Analyst will then file a ticket to track the scheduling request.

5.1 Process Overview



5.2 Review Scheduling Request

The Module Lead and Functional Analyst perform a high-level analysis on the scheduling request. Most scheduling requests can be accommodated, but should only be done if it makes sense.

Parameter Changes

The number of changes to the scheduling request, run controls, etc... should be heavily analyzed before considering a scheduling request. If parameters change frequently, it may make more sense to schedule the process manually via the Process Scheduler after each parameter change.

Scheduling Frequency

The frequency of each scheduling request should be discussed before considering a scheduling request. If the process is run infrequently, it may make more sense to schedule the process manually via the Process Scheduler when it is necessary.

5.3 Analyze Scheduling Request

Each scheduling request should be analyzed for impacts on current functionality and business processes. All impacted functionality should be described and testing scenarios should be developed to provide comprehensive testing.

Current Functionality/Business Processes

Scheduling requests may affect, or be dependent upon, current business processes. This functionality should be noted and tracked by the Module Lead to ensure each scheduled process is completing the appropriate tasks. Automation of various processes will require better coordination and scheduling of the manual business processes.

Scheduling Request Document

Each scheduling request must have an accompanying, completed Scheduling Request Document, regardless of the size or impact of the scheduling request. This document provides comprehensive information about each scheduling request, how it will be tested, and how it will be scheduled. This document can also be transferred to another staff member in the event the Module Lead, Functional Analyst, or Technical Analyst is unavailable. Each document will be stored on SharePoint to track progress and kept until each scheduling request has expired.

5.4 File Scheduling Request Ticket

The Functional Analyst will file a ticket for the Technical Analyst to schedule the process.

The completed Scheduling Request Document should be attached and the following information should be provided for the scheduling request ticket:

[Description]

Description: Scheduling Request - AD - Action/Reason Letter Assignment
Date Needed: 12/1/2007

[Classification]

Type: Enterprise Applications
Subtype: PeopleSoft/CMS
Category: <Appropriate Module>

[Additional Items]

Action Required: CMS - Change Request
Technician Assigned: Q - CMS Technical
Module Lead: Jane Doe
Functional Analyst: John Doe
Security Impacts: <Listed>
Special Considerations: <Listed>

5.5 Deliverables/Milestones

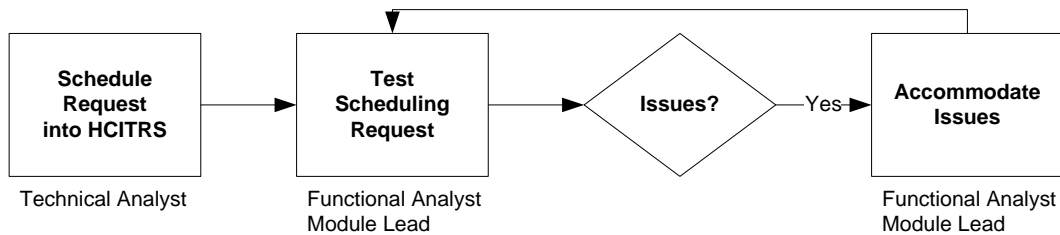
The following deliverables/milestones are required.

- *Scheduling Request Document* – Completed documentation that provides a clear roadmap for installation, testing, and implementation.
- *Scheduling Request Ticket* – Ticket opened to the Technical Analyst to track all efforts to schedule the process.

6.0 Phase 2 – Installation & Testing

Phase 2 covers the testing of each scheduling request. The Technical Analyst begins by scheduling the request in HCITRS for testing. The Module Lead and Functional Analyst will review the results of the scheduling request the following day. All issues should be logged and accommodated. Once testing has been completed, a notification is sent by the Functional Analyst to the Technical Analyst that this scheduling request is ready for production.

6.1 Process Overview



6.2 Schedule Request into HCITRS

The Technical Analyst will schedule the process in HCITRS for testing. A notification is sent back to the Module Lead and Functional Analyst for testing to begin.

Scheduling Request Timing

Scheduling Requests will need to be balanced against other production control requests. For example, a scheduling request may not be accommodated right away if the CMS Technical Team is busy preparing HCITRS for a new update/fix testing cycle. All efforts will be made to communicate a valid testing date should other technical work take priority.

6.3 Test Scheduling Request

Each scheduling request is tested according to the scenarios developed in the Scheduling Request Document. The previous analysis should have identified all affected functionality. Once all issues have been resolved, the Functional Analyst sends a notice to the Technical Analyst.

6.4 Accommodate Issues

Issues arising from this should be accommodated appropriately, potentially through changing the requested parameters, adjustments to security, or revocation of the request depending on the severity of this scheduling request.

6.5 Deliverables/Milestones

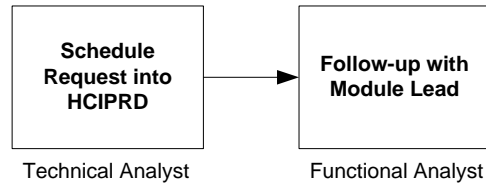
The following deliverables/milestones are required.

- *Scheduling Request Testing Sign-Off* – Scheduling Request Document is updated to include an official sign-off that the scheduling request has been tested and is ready for implementation in Production.

7.0 Phase 3 – Implementation

Phase 3 covers the implementation of each scheduling request. The Technical Analyst will schedule the process within HCIPRD according to the Scheduling Request Document. A note will be sent to the Module Lead and Functional Analyst to let them know this has been completed. The Functional Analyst then contacts the Module Lead to acknowledge successful scheduling and follow-up with any issues.

7.1 Process Overview



7.2 Schedule Request into HCIPRD

The Technical Analyst will schedule the process in HCIPRD according to the Scheduling Request Document.

7.3 Follow-Up with Module Lead

The Functional Analyst contacts the Module Lead to review the scheduling request.

7.4 Deliverables/Milestones

The following deliverables/milestones are required.

- *Implemented Scheduling Request* – Technical Analyst complete the scheduling into HCIPRD.
- *Finalized Scheduling Request Document* – Final documentation is signed-off to complete the scheduling request.