

Major IT Project/Procurement Request

Forms (with Section I completed) are due to your Division Project Coordinator by **March 25, 2016 at 5PM.**

SECTION I. TO BE COMPLETED BY THE REQUESTOR & SPONSOR

Step 1. About this Request

What is this project?	Request Date	Requester Name
Planning Budgeting Cloud Services (PBCS)	3/21/16	Jay Chapman
Why is this project or procurement being requested?	What are the alternatives?	
CI has had Hyperion Public Sector Planning & Budgeting for the past five plus years with no IT support. In addition to limited resources to put into the program to keep it running smoothly, we need a budgeting tool that can be accessed from any device with any web browser, requires minimal IT resources, and provides no learning curve for end-users.	If PBCS is not procured, the campus will use a program that is no longer supported by Oracle. Moreover, the campus will still have to rely on limited infrastructure which does not allow proper storage of past year data, and the Budget & Planning office maintaining an Enterprise Performance Management environment without the proper experience.	

Step 2. Personnel Involved

Sponsoring Division	Business & Financial Affairs	Primary Contact	Jay Chapman
Sponsor Name	Missy Jarnagin	Stakeholders	CI Budget Managers and Budget Officers
Go-Live Authority	Missy Jarnagin		

Step 3. High-Level Timeline

Proposed Start Date	3/21/16
Proposed Launch/Go-Live Date	5/1/16
List any hard deadline(s) or key milestones	We plan on opening Hyperion in April for data entry. It would be nice to have the new environment by then.

Step 4. Budget

Is there budget/funding already allocated to this project or procurement in the current fiscal year?	Yes
Is this a grant-funded project or procurement?	No
Total estimated one-time cost	\$12,000
Total estimated permanent cost (maintenance, support, etc.)	\$6,930 quarterly for 36 months
Which division(s) will provide funding for ongoing maintenance and support of the product, service or system resulting from this procurement?	Business & Financial Affairs

Step 5. 2015-2020 Strategic Priorities Supported

Please provide a brief (1-2 sentence) narrative about how this request supports **at least one** of the Strategic Priorities in the CI 2015-2020 plan

Strategic Priority	Short Narrative
1.1 Provide University access to students who bring diverse perspectives	
1.2 Provide a mission-driven education that prepares students for individual success as they become contributing members of society	
1.3 Provide support for student persistence toward degree completion and opportunity for timely graduation	
2.1 Hire and support high quality faculty and staff who are committed to the mission of the University	
2.2 Infuse integrative approaches, community engagement, multicultural learning, and international perspectives into all aspects of learning	
2.3 Engage undergraduate and graduate students in research and creative activities	
3.1 Build infrastructure capacity	
3.2 Leverage the use of technology	Deploying to PBCS allows the campus to continue its path to cloud computing & services. Leveraging cloud technology provides flexibility, automatic software updates, the elimination of servers and hardware, and easier accessibility.
3.3 Seek, cultivate, and steward resources both public and private	
3.4 Implement collaborative planning and accountability processes	PBCS provides cloud-based workflow and data sharing, which allows for greater collaboration amongst users.

Step 6. Criticality - please answer these questions about the criticality of this request

Criteria	Yes/No	Explanation
Is this required or mandated by the President or the Chancellor's Office?	No	
Is sensitive or confidential CI data being compromised, or is at risk of being compromised at a level that is higher than the university is willing to accept?	No	
Is CI out of compliance, or at risk of being out of compliance at a level that is higher than the university is willing to accept?	No	
Is this a warranted <i>maintenance</i> upgrade for an already established system?	Yes	Deploying to PBCS is a upgrade from our current on-premise application and will allow for automatic updates and maintenance.
Is this a system that delivers a more robust overall platform to support expansion of IT systems, services, or technologies?	Yes	PBCS will allow end users to use any web browser and access data from their mobile devices.
Is this required to fulfill the core functions of the requesting unit or division?	Yes	Budgeting for the campus is a core function on the University.

Step 7. How will the success of the project be measured?

List at least 1 metric which will be used to determine the success of the project:	Success will be measured using soft metrics such as improved customer satisfaction and improved productivity.
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END OF SECTION I**SECTION 2: TO BE COMPLETED BY T&C, IN CONJUNCTION WITH DPC, REQUESTOR & SPONSOR****IT Analysis**

Is this a chargeback project?	Enter Yes/No
Is this already an active project in TeamDynamix?	Enter Yes/No
Please select ONE of the following 3 project types: New product/service Upgrade/enhancement Research/discovery	Enter ONE of the three options at left

In the scoring rubric below, enter the score in each row, and add all scores in "Total" cell. PLEASE NOTE: the total score calculated in this rubric will not be used as a critical factor in selecting and approving requests. Individual scores for each risk indicator may be used to guide discussion regarding categorization and prioritization of requests.

Project Risk Indicator	Low (2 points)	Medium (3 point)	High (5 points)	Very High (8 points)	Score
Estimated work hours	30 - 100	101 - 200	201 - 300	More than 300	
Estimated work duration	< 2 months	2-6 months	6-12 months	> 12 months	
Total team size (# of persons, inside & outside of T&C)	1-4	5-9	10-14	15 or more	
# of cross-functional workgroups/teams involved (Inside & outside T&C)	1-2	3-4	5-6	7 or more	
Technology and/or business process	In-house expertise; already in widespread use	Familiar; already in limited use, may require limited changes	New to campus; requires significant changes to existing processes	New to campus; requires new business process altogether	
Complexity	Solution is well defined; no problems expected	Solution is known; some problems expected	More than 1 approach available	Solution unknown or vaguely defined	
CMS data requirements	No involvement; CMS data already available to campus developers	Campus developers able to extract data from CMS and add to other data sources	CI Finance OR CI Records customization or data extraction	CI Finance AND CI Records customization or data extraction	
Urgency	Important for one organization	Urgent for one organization	Important for multiple organizations	Urgent for entire campus	
Cost	Only costs staff time	Staff time + up to \$1,000 (one-time)	Staff time + < \$5K (one-time) OR <\$5K (annually)	Staff time + > \$5K (one-time) OR > \$5K (annually); -OR- Budget is unknown at this time	
Impact / Priority	Serves 1 department, optional to others; no impact to enterprise systems, and less than 10% of Univ. users	Serves multiple organizations; impacts enterprise systems and/or more than 10% of Univ. users	Campus-wide impact; impacts enterprise systems	System-wide impact; regulatory requirement	
			Minimum score: 20 Median score: 50 Maximum score: 80	ENTER SUM OF SCORES	0

Requirements (what does it need to do, and what is needed to do it?)	Include a summary of the equipment, product, or services required to accomplish the project.
Deliverables	Enter high-level information about major <i>tangible items</i> to be created/provided.

(what will be created/provided?)	
List all affected systems or services.	Enter the systems or services here.
List all affected groups or organizations	Example: all students, employees only, T&C staff only, ASG staff only, Academic Advising, Student Affairs, OPC, etc. List number of persons affected, if applicable.

IT Strategic Initiatives Supported:

What IT Strategic Plan Initiatives are supported by this request? Mark an **X** next to each initiative supported.

	The Connected Campus		Communication & Collaboration
	The "Paper-Less" Campus		Service Lifecycle Management
	The Secure Campus		Infrastructure Development
	The Data-Driven Campus		Continuous Operations Improvement
	Enabling Teaching and Learning Innovation		

Assigned To:

T&C Supervising Manager	T&C Project Lead	T&C Team
Name of T&C manager who is responsible for this project	T&C manager or staff who will lead the project, if different from #1.	List all participating T&C staff members.

Estimated Resource Allocations (IT staff & hours)

For each T&C group, estimate the total staff hours required, and provide a detailed breakdown by staff member in each functional area.

IT Group:	Application Services	Infrastructure	Information Security	User Services & Solution Center	Project Mgmt	Teaching & Learning Innovations	Web Services
EST. HOURS:	0	0	0	0	0	0	0
DETAIL:							

EXAMPLE:

	Application Services	Infrastructure	Information Security	User Services & Solution Center	Project Mgmt	Teaching & Learning Innovations	Web Services
EST. HOURS:	100	25	5	5	30	2	10
DETAIL:	Kelly Macias: 20 Angela Stockmon: 80	Herb Aquino: 5 Peter Scamardo: 20	Neal Fisch: 5	Carlos Miranda: 5	Peter Mosinskis: 10 Melissa Bergem: 20	Jill Leafstedt: 2	Daniel Martinez: 10

T&C Comments: