



PROJECT SCOPE STATEMENT

Note: Any work not explicitly included in the *Project Scope Statement* is implicitly excluded from the project.

Project Name:	Learning Abroad Prospect and Application
Prepared by:	David Whiting
Date (MM/DD/YYYY):	12/06/2007

Version History (insert rows as needed):		
Version	Date (MM/DD/YYYY)	Comments
1.0	01/04/2008	Initial Draft
2.0	01/28/2008	Revision to update exec summary, project description and project milestones.
2.1	01/31/2008	Updates based on team feedback, to exec summary, business objectives, deliverables and communication management sections.
2.2	02/04/2008	Updates to project deliverables section – added deployment section and additional deliverable to testing.
2.3	2/27/08	Added application payment (in/out) scope and section 5.9 about Post Production Support.



1. Executive Summary

Provide below a brief overview of this project (e.g., project purpose and justification):

To implement PeopleSoft Campus Solution modules along with custom-built features (in PeopleSoft and Java) for the Learning Abroad prospect and applicant business processes. The project will include automating both student and administrative business processes related to student abroad prospects and applicants.

Provide a brief project summary in the space below. This information may be available in the Project Charter. Also provide a link to the *Project Charter* for reference.

[Link To Project Charter](#)

Currently there is no enterprise-wide solution for applying for and tracking Learning Abroad experiences at the University of Minnesota. In most instances, this has resulted paper processes and/or in minor electronic tracking systems (Excel). In turn, use of these systems raises concerns about data integrity due to lack of upkeep and relying on self-reported data as well as requiring duplicate data entry by staff and participants. In addition, extra processes are required for Learning Abroad professionals to communicate across collegiate office and campus boundaries. This situation then makes it difficult to track student information and activities, generate meaningful reports – especially on a university-wide level – respond to requests for information from stakeholders and outside agencies in a timely manner, and to make judicious management decisions about students, programs, and strategic direction. The University needs an enterprise-wide, integrated, state-of-the-art software system that will provide an easy online mechanism for student to identify and track themselves as study abroad prospects and/or applicants. Similarly, learning abroad offices need access to data with regard to Learning Abroad experiences for report generation, tracking, evaluating programs, and making management decisions based on reliable, centrally managed data. This enterprise solution will leverage / utilize the University Of Minnesota's Enterprise Solution including Oracle / PeopleSoft and Pillar Architecture (Web).

Note: In any instance where there is a discrepancy between the *Project Charter* and the *Project Scope Statement*, the latter is considered authoritative.

2. Business Objectives

2.1 Business Objectives:



2. Business Objectives

- To define, create, and implement a single enterprise learning abroad prospect and application system with a common framework suitable for all learning abroad personnel on the UMN campuses, Learning abroad processors in colleges and departments, and learning abroad offices/functions on all UM System campuses.
- Elimination of shadow systems.
- Provide for ease of reporting (for users in the Learning Offices, collegiate offices, or university administration) from a single, all encompassing database.
- System should provide processing capability for a minimum of 50,000 prospects and 25,000 Applications per year.
- System should include:
 - Ability for LA and collegiate staff to identify, enter, and update a learning abroad prospect
 - Ability for LA and collegiate staff to enter, save, review, approve, or deny a learning abroad application.
 - Ability of system to, upon confirmation of an application, updates the PeopleSoft Learning Abroad Participant and Program Management module.
 - Ability to quickly retrieve information of individual or groups of prospects or applicants.
 - Ability for students to enter prospect and application information and track student status and checklist completion requirements via the web – Student/Person Self Service.
 - Ability to track application payment. Solution (automated/manual business process) will be determined in analysis.



3. Project Description

For each area below, provide sufficient detail to define this project adequately:

3.1 Project Scope

Includes (list Deliverables):

Deliverables:

Analysis

- Business Requirements for Reporting & Student (web)
- To Be Business Processes Flows
- Fit Gap Analysis

Design & Development

- Function Design Specifications
- Technical Design Specifications
- Reporting Specifications

Testing

- Testing Strategy
- System Test Scripts
- User Acceptance testing Criteria

Deployment

- Job Aids for Learning Abroad Center and collegiate staff
- Query Training for Learning Abroad Center staff

The following PeopleSoft Campus Solution modules will be implemented as part of this project following the OIT Project Methodology:

- Use PeopleSoft Recruiting and Admissions (Prospects and Applicants) Module
- Campus Community (3C's) Module
- Person Data / Bio-Demo Data

Limited customizations will be completed based on agree upon business requirements with substantial functionality limitations / gaps.

Does Not Include:



3. Project Description

- Student Records (The exception is viewable access to Student (Person Data / Bio-Demo) Data)
- Financial Aid
- Student Financials
- Processes around confirmation fee payment and course fee payment

3.2 Project Completion Criteria:

- User Acceptance and Sign-Off

3.3 External Dependencies:

- The project is not depending on another on-going project.

3.4 Assumptions:

- Support and Attention from Project Sponsors
- Resources will be available when needed. (people and other resources)
- U of MN – Twin Cities will function as the Learning Abroad Core Team and represent all other organizations, campuses and schools that will use new process.
- Each collegiate group and coordinate campus will have a SME who will provide input and champion effort as necessary.

3.5 Constraints:

- Project Resource Utilization Level / Ability to devote adequate time to achieve goals.
- U of MN – Twin Cities will function as the Learning Abroad Core Team and represent all other organizations, campuses and schools that will use new process.

4. Project Milestones

Estimated Schedules – List key project milestones relative to project start. (Insert rows as needed)

Project Milestone	Target Date (MM/DD/YYYY)
• Project Start	
• Complete Analysis	01/31/08



4. Project Milestones

• Complete Functional Design	3/31/08
• Complete Technical Design	5/15/08
• Complete Development	10/31/08
• Complete Testing	11/26/08
• Complete User Acceptance	12/31/08
• Complete User Training	12/31/08
• Complete Deployment	1/31/09
• Project Complete	2/15/09

5. Project Approach

5.1 Primary Plans - Will the project have formal written plans – i.e., project schedule, budget, quality, risk, etc.? Describe briefly in the space below:

The Learning Abroad Prospect and Application Project is using the current OIT Project Methodology, which provides for formal written project procedures, documents and other related tools use the effectively manage this project. Refer to NetFiles – PMO Folder / LA Prospect & Application.

5.2 Scheduled Status Meetings (Insert rows as needed):

Meeting	Purpose	Frequency
Project Team Status	Communicate Statuses, Issues, Risks, Action Items, Decisions	Weekly
Project Leadership	Communicate Status, Issues, Risks, Decisions,	Bi-Weekly or Monthly

5.3 Scheduled Status Reports (Insert rows as needed):

Report	Purpose	Frequency
Team Status Report	Individual task progress	Weekly
Project Status Report	Management report on project status	Weekly / Monthly
Project Communications	To inform designated University members of project status	Weekly / Monthly

Briefly describe how each of the following will be handled. Provide links to relevant documents as appropriate. Modify example text provided or enter your own.



5. Project Approach

5.4 Issue Management:

- Project-related issues will be tracked, prioritized, assigned, resolved, and communicated in accordance with the *Project Management Methodology*.
- Issues will be reported using an [Issue Report Form](#). Issue descriptions, owners, resolution and status will be maintained in an [Issues Log](#) in a standard format.
- Issues will be addressed with the project owner and communicated in the project weekly status report.

5.5 Change Management:

The change control procedures as documented in the Learning Aboard Prospect and Application Project Change Management Plan will be consistent with the Project Management Methodology and consist of the following processes:

- A [Change Request Log](#) will be established by the Project Manager to track all changes associated with the project effort.
- All Change Requests submitted via [Change Request Form](#) will be assessed to determine possible alternatives and costs.
- Change Requests will be reviewed and approved by the project owner.
- The effects of approved Change Requests on the scope and schedule of the project will be reflected in updates to the Project Plan.
- The Change Request Log will be updated to reflect current status of Change Requests.



5. Project Approach

5.6 Communication Management:

The following strategies have been established to promote effective communication within and about this project. Specific Communication policies will be documented in the Learning Abroad Prospect and Application Project Communication Plan.

- The Project Manager will present project status to the project Sponsors on a weekly basis; however, *ad hoc* meetings will be established at the Project Manager's discretion as issues or change control items arise.
- The Project Manager will provide a written status report to the project Sponsors on a monthly basis and distribute the Project Team meeting minutes.
- The project Sponsors will be notified via e-mail of all urgent issues. Issue notification will include time constraints, and impacts, which will identify the urgency of the request for service. Additionally, monthly communication regarding the status of the project will go out to project sponsors.
- The Project Team will have weekly update/status meetings to review completed tasks and determine current work priorities. Minutes will be produced from all meetings.
- All electronic Project Documents will be maintained in central storage accessible by all project stakeholders.

5.7 Procurement Management:

- N/A

5.8 Resource Management:

The project team will produce a Resource Management Plan that will document the following:

- Lists all major goods and services required in the project along with cost estimates and quality information.
- Indicates which goods and services will be obtained from sources outside the Organization
- Indicates who is assigned to the project and when.



5. Project Approach

5.9 Post Production Support

Our **interim** plan for post-go live support from ASR. After the interim period (one year after go live) ASR, OIT, and LAC will develop a permanent plan for support. This gives LAC time to determine the staffing, knowledge, and budgetary implications of taking full ownership of supporting this system. LAC's interim proposal is:

- ASR agreed to provide business analyst(s) for implementation and post-go live support, including backup analysts to ensure continuity
- 1st tier support: LAC will be the central office for all the campuses and collegiate units; requests for modifications and business process changes will be funneled through LAC, but we will require ASR's strategic knowledge of the breadth of the student services systems before a request is made to OIT
- 2nd tier support: LAC will escalate issues as needed to ASR's assigned business analyst(s)
- 3rd tier support: ASR will escalate issues to OIT as appropriate
- LAC will rely on ASR's training infrastructure (labs, signup), but LAC staff will assist with or conduct training for users.

6. Authorizations (*Modify lists as needed*)

The Scope Statement, Project Schedule and Risk Management Plan are approved by the:

- Project Sponsor
- Project Manager

Project performance baseline changes will be approved by the:

- Project Sponsor / Business Process Owner
- Project Manager

Project deliverables will be approved/accepted by the:

- Project Sponsor / Business Process Owner
- Key Stakeholders

Specific task responsibilities of project resources will be defined in the *Responsibility Assignment Matrix*.



7. Project Scope Statement Approval / Signatures

Project Name: Learning Abroad Prospect & Application

Project Manager:

The purpose of this document is to provide a vehicle for documenting the initial planning efforts for the project. It is used to reach a satisfactory level of mutual agreement among the Project Manager, Project Sponsors and Owners with respect to the objectives and scope of the project before significant resources are committed and expenses incurred.

I have reviewed the information contained in this Project Scope Statement and agree:

Name	Role	Signature	Date (MM/DD/YYYY)
Meredith McQuaid	Project Sponsor – LAPA		
Sue Van Voorhis	Co-Sponsor		
Jodi Malmgren	Business Process Owner		
Dave Krueger	Technical Sponsor		
Garfield Bowen	Enterprise Project Management		

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Project Scope Statement document.