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**INTEROFFICE MEMORANDUM**

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**TO:** MEMBERS, FACULTY SENATE  
MEMBERS, ACADEMIC RESOURCE COUNCIL  
UNIVERSITY MEDICAL GROUP, CLINICAL MANAGERS

**FROM:** BRUCE W. VIEWEG, ASSOCIATE VICE PRESIDENT, CO-CHAIR, GATEWAY STEERING COMMITTEE  
ELLEN HARSHMAN, PH.D., DEAN, COOK SCHOOL OF BUSINESS, CO-CHAIR GATEWAY STEERING COMMITTEE

**SUBJECT:** WINTER UPDATE: GATEWAY - THE INFORMATION INITIATIVE OF SAINT LOUIS UNIVERSITY

**DATE:** FEBRUARY 2004

**CC:** MEMBERS, GATEWAY STEERING COMMITTEE

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The following summarizes the major milestones, risks, issues, financials, and overall Gateway project status through January 2004. This Gateway initiative officially began when Rob Altholz, formerly Vice President of Business and Finance, signed the SCT agreement on December 23, 2002. The project will end in December 2005.

**Overall progress** – All modules are on target for go-live on the following dates:

Financial system is on target to go-live on July 1, 2004  
Advancement is on target to go-live on August 1, 2004  
Student – Recruitment and Admissions segments - is on target to go-live on September 1, 2004  
Human Resources is on target to go-live on January 1, 2005 (This is a change from the original November 1, 2004 go-live date and was changed due to decreased risk of going live at the beginning of a calendar/tax year).  
Financial Aid is on target to go-live on February 1, 2005  
Student – Records, Registration, and Accounts Receivable – is on target to go-live on March 1, 2005

Project updates are provided to the University's Executive Staff on a weekly basis. Quarterly reports are given to the Board of Trustees Audit and IT committee, to the Faculty Senate, to the Staff Advisory Council, to the Academic Resource Council, and to the University Medical Group Departmental Administrators and Clinical Managers.

- **Gateway project**

- **Luminis portal** – The portal was launched across the University on Monday, January 26, 2004. Several technical issues continue to present mainly related to the current PLUS systems that are a direct result of the significant system modifications that were made in these systems by SLU over the past 15 years.

o **Banner modules** – Objective measurement of progress

The table below represents a ratio of the percent of project completed and percent of project completion expected. The date used for these comparisons is January 30, 2004.

The ideal ratio would be either 1, indicating that both values are the same, or greater than 1, indicating more progress has been actually made than expected by the project plan.

	% complete <sup>1</sup>	% expected	Ratio
<b>Overall Gateway project<sup>2</sup></b>	<b>35%</b>	<b>36%</b>	<b>.97</b>
<b>Finances – go live 7/1/04</b>	<b>23%</b>	<b>24%</b>	<b>.96</b>
<b>Advancement (Alumni and Development) – go-live 8/1/04</b>	<b>27%</b>	<b>30%</b>	<b>.90</b>
<b>Student Recruitment and Admissions go live 9/1/04 Records, Registration, and Accounts receivable – go live 3/1/05</b>	<b>15%</b>	<b>12%</b>	<b>1.25</b>
<b>Human Resources – go-live 1/1/2005</b>	<b>19%</b>	<b>16%</b>	<b>1.19</b>
<b>Financial aid<sup>3</sup> - go-live 2/1/05</b>	<b>8%</b>	<b>7%</b>	<b>1.14</b>

The ratio of completed to expected progress is well within a reasonable range for the overall Gateway project and for each individual module. Project management will continue to monitor progress on a monthly basis.

o **These Gateway modules have not, as yet, been scheduled:**

- **Data mart / Data Warehouse**
- **ePrint** (electronic print distribution)
- **Electronic workflow**
- **WebCT connection** – cannot be implemented until completion of Student System in March 2005

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<sup>1</sup> Percent complete to go-live in nearly all systems will be less than 100% - due to significant post-go-live activities for many of the individual business systems.

<sup>2</sup> The date of the pre-implementation planning meeting, January 24, 2003, is used as the Gateway project start date.

<sup>3</sup> System education activities related to Financial Aid will not begin in earnest until March 2004.

- **Implementation of additional utility software purchases will need to be added to the project plan**
  - **Evisions** – print formatting software to fill a need that is not available within base Banner (payroll checks; Accounts payable checks)
  - **APPworx Scheduling** – Sun Solaris (Unix) job scheduling software
  - **TOAD** – Oracle editor (programming tools for administrative systems programmers and DBAs)
  - **LoadTesting** software – simulates up to 250 concurrent users of web-based systems to determine adequacy of application and server to handle expected user load

## **Financials**

- Gateway Project, to date and with projections to completion in 2005, remains under budget

## **Milestones this period**

- The Luminis portal launched with Calendar, E-Mail, Groups functioning as expected. To date nearly 500 faculty and staff have received Gateway training.
- A new SCT student system consultant (Carol Berg) began working with the Student Team.
- The Document Imaging software (eXtender) application was successfully installed in January. The first use of Document Imaging will be with the Finance Accounts Payable module
- After careful consideration, the Human Resource team requested their go-live date be changed from November 1, 2004 to January 1, 2005. The Steering Committee unanimously endorsed their recommendation.
- The Gateway Steering Committee members held a half-day retreat to review project financials, the project plan, to update risks and assumptions, and to identify successes, problems and issues associated with the project.

## **Issues, risks, and challenges**

- As was reported in December, SCT raised multiple complaints filed by SCT consultants associated with the continued use of Water Tower Inn for housing of consultants. Water Tower Inn management is attempting to resolve many of the issues raised by the consultants. As a reminder, the use of the Water Tower Inn for SCT consultants is required by our contract. Discussions continue on this issue. SCT is currently covering the cost of housing the consultants at other hotels in St. Louis. The University has recommended a compromise that is being considered by SCT.
- The University's Financial Aid team raised several issues regarding their current system implementation consultant from SCT. The project has requested that the individual be replaced.
- Project clerical and ITS business staff are carefully reviewing the detail of SCT consultant travel reimbursement requests. The staff has identified several questionable transactions. Those specific items will not be paid until an acceptable explanation and/or correction is received from SCT.
- As we have mentioned briefly in the past, when we evaluate project human resource need vertically, we are expecting a shortfall in resource during the summer. In order to provide additional resource to the project, we are considering hiring contracted staff to assist with report migration – from the PLUS to Banner systems.

## **Detailed Project Progress**

- SCT Contracted Services
  - A careful analysis of the current and projected use of purchased SCT consultant service hours continue to indicate adequate levels of unallocated hours available in case of specific unanticipated need. Current balances of unused and currently unallocated hours are:

- Student – 68 hours
- Finance – 40.25 hours
- Financial Aid – 48 hours
- Human Resources – 94 hours
- Advancement (Alumni and Development) – 45 hours
- Remote DBA services – 299 hours (all of these will be utilized)
- Available service block – 600 hours (100 hours have been used for the School of Medicine Business Process Analysis sessions)
- Total available hours: 1194.25

According to the contract, SLU may carry-over up to 550 hours past the original project end date: 12/23/05. Several additional system education sessions are planned for Finance, Student, Advancement, and Human Resources.

- Project Documentation
  - There has been significant progress made on establishing standard templates for documenting system information. These are current being vetted by individual functional teams.
- Business Process Analysis (BPA)
  - A mini-BPA was held for Business and Finance in Accounts Payable to incorporate document imaging in Accounts Payable.
  - A special focused business process analysis, for student and financial aid issues, within the School of Medicine, took place in October, at the request of Dean Monteleone. The report has been received and has been shared with School of Medicine stakeholders.
  - The HR functional team is reviewing the report of the Improved State BPA workshop.
- Project plan
  - The plan has been updated and responsibility for each task is assigned to a specific individual.
  - Monthly reports are being generated that identify missed and upcoming task deadlines.
  - Objective measurement of progress continues.
- System Education/Development
  - Student: System – Follow-up consulting on general person issues in recruitment and admissions was held in December. A workshop on Letter generation and populations selection was held in January for all members of the student team.
  - Human Resources – Two weeks of system education was held in December – focused on Benefits, Budget, and Position Control.
  - Financial Aid – The first session for the Financial Aid team was held to review Banner navigation, record creation and electronic data exchange.

- Financial System – Consultations on Research accounting and proposal tracking was held in December. In January, a session on reengineering Accounts Payable to use imaging was held.
- Advancement – System education focused on Constituents, organization, and an overview of campaigns and designations was held in December.
- System education activities continue, generally, at 1 each month for each of the five modules.
- Conversion
  - Conversion activities continue across all applications.
  - While a few problems have been encountered with General Person data, it is expected that all GP data is migrated before the end of February.
- Interfaces
  - Project staff are researching potential interface requirements between Gateway and InfoEd (Electronic Research Administration).
  - Interface work is nearing completion between the current PLUS student system and Recruitment Plus – a commercial product being used for recruitment for undergraduate students.
- System Security
  - Standard security practices are in place.
  - Functional individuals who will be responsible for security have been identified.
- Reporting
  - Technical staff, together with staff from IBI, have installed WebFocus the Web-focus software on the Sun Solaris server. Technical problems have caused some difficulty but the install is complete.
  - Technical training, of new software functionality, will begin later in February.
- Testing
  - Progress in defining testing strategies continues.
- End User Training
  - As a reminder, Gateway training spaces include a total of 77 computer workstations:
    - Room 207 Des Peres Hall – 16 wireless workstations
    - Room 114 Des Peres Hall – 14 workstations (primary ITS training space)
    - Room 108 Des Peres Hall – 12 workstations (used by students when not in use by Gateway)
    - Room 110 Des Peres Hall – 20 workstations (used by students when not in use by Gateway)
    - Room 631 Salus Center – 15 workstations

- Summary of Gateway training through January 31, 2004.:
  - The following training materials have been developed and are provided to all participants
    - Introduction to Gateway (portal)
    - Gateway Calendar – Level 1
    - Gateway Calendar – Level 2
    - Gateway Groups
    - Gateway E-mail
  - Training sessions are scheduled for both Frost and the Health Sciences Center – nearly 500 staff and faculty have taken training since training began in January. All sessions through March are filled. Project staff are attempting to identify additional trainers and training space.