

Administrative Systems Governance

First Draft: 11/19/08

This document describes the roles and responsibilities of those whose work involves the Administrative information systems. This includes PeopleSoft and Financial Edge and any related 3rd party or custom developed components.

Advisory Group Roles & Responsibilities

- ◆ Membership: CAO, CDO, CFO, CIO, Dean of Admissions, Dean of Graduate Studies, President's Office and Provost. Convened by Director of Computing Services. Other members of the community will be invited based on the agenda.
- ◆ This group is strategic in nature.
- ◆ Approves timing and expense of PeopleSoft and Financial Edge upgrades and additions. Some involvement with project prioritization, especially as affects strategic tradeoffs.
- ◆ Responsible for getting Cabinet approval of budgetary impacts beyond current I.S. and other departmental budgets.
- ◆ Approves policies and procedures.

Steering Group Roles & Responsibilities

- ◆ Membership: one (or two) representative(s) from each of the major departments that use the administrative systems, including Admissions, Alumnae, Controller, Financial Aid, Graduate Studies, Human Resources, Institutional Research, Registrar, Resources and Provost's Office. Convened by Head of Administrative Information Systems.
- ◆ These representatives are generally managers with authority to speak for the department on issues of timing, budget and policy. The representative is a liaison between functional users and the technical staff.
- ◆ Responsible for the effective and safe use of the administrative systems, including responding to issues raised in the audit and other security, business continuity and data archival issues. In essence, the operational authorities for the administrative systems.
- ◆ Coordinates the timing and testing of patches and related system maintenance.
- ◆ Evaluates the institutional and departmental value of software upgrades and enhancements (such as additional modules and 3rd party software).
- ◆ Proposes timing and budgets for PeopleSoft and Financial Edge upgrades and additions.
- ◆ Drafts policies and procedures for Advisory Group approval.

Data Standards Group

- ◆ Membership: super users and/or steering group members for each department. Convened by Head of Administrative Information Systems. Meets quarterly or as needed.
- ◆ Responsible for resolving issues regarding the use of data; in particular, setting standards to be used when entering or editing data.
- ◆ Drafts policies and procedures for Steering Group and Advisory Group approval.

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Individual Roles and Responsibilities

- ◆ The chart that follows describes the roles and responsibilities of the staff members of Information Services and other departments who work with the administrative systems.

	Programmer / Analyst	Super-User	End-User
Description	A member of AIS (Administrative Information Systems)	A member of the functional department, usually the most technical person.	The other members of the functional department that use the system.
Role Summary	Supports functional departments in creating queries and does programming for new features.	First line support for functional issues / questions from End-Users. Liaison to AIS.	Primarily utilizes the data entry aspect of the systems.
Functional Knowledge	Has limited functional knowledge of day to day activity & business processes. Has extensive knowledge of data tables.	Has a solid understanding of the day to day activity & business processes. Has some knowledge of data tables.	Has extensive knowledge of the day to day activity. Assists Super-User in business process improvements.
Query / Crystal	Supports the Super-User in testing / debugging queries / crystals.	Create queries / crystals. Determine when an SQR or VB programming may be needed.	Run queries / crystals. Perhaps creates simple ones.
Reports / Reporting tables / update processes	Create SQR / VB program for reports, reporting tables, and update processes as needed.	Provide the specification for reports, reporting tables, update processes. Tests and signs off on all AIS development work.	Assists the Super-User as requested
Patches	Install the patches according to release schedules or as requested to resolve a bug.	Tests the patches within a specified window.	Tests patches if Super-User / Manager request.
Software Vendor Problem Resolution	Submits technical cases to software vendor - assists with functional cases as needed	Submits functional cases to software vendor. Uses vendor website and peer listservs to research issues	Perhaps participates in list-serves.
Training	Stays current on the technical tools required to maintain the application.	Attends all relevant classes & AIS developed training.	Perhaps attends classes & AIS developed training.
Security	Has full access to test environments. Requests move of programs to production.	Has full access to relevant functional areas and full access to query relevant data.	Gets access as determined by departmental super user.
Data integrity and usage	Responsible to know the location of data in tables. Write programs to update data when requested and warranted.	Responsible to know data usage and to update values when needed (e.g. new term or new code) and to recognize when to discuss with tech.	Responsible to follow data standards and to do data entry as accurately as possible. Should raise data concerns as they arise.

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- ◆ The programmer/analysts are generally assigned to a group of departments. This allows them to develop expertise and relationships with a particular set of users and super-users.
- ◆ The technical and functional partners should meet regularly to review current and upcoming projects as well as upcoming patches and other issues (so-called “TechnoFunc” mtgs). Prioritization of tasks should take place at this time in order to provide a clear road-map of task completion dates. Priorities should reflect agreement between all of the areas supported by one AIS resource. When possible, those functional managers should negotiate institutional priorities.
- ◆ These meetings also provide an opportunity to discuss other tech issues, such as system performance, training or reporting needs. These teams should also identify and document the list of critical processes to be tested before signoff.

The Pairings

Software Vendor	Module	IT Partner(s)	User Partner(s) * =super user
Blackbaud	Financials (GL/AP)	Aaron	Betsy Stewart, Annemarie Thompson*
PeopleSoft	Academic Advising	Rhiain	Kirsten OBeirne*, Diane Crow*, Nancy McCool, Lea Miller
PeopleSoft	Admissions	Darnay	Diane Crow*, Peggy Robinson*, Lea Miller, Annmarie Hofmann, Ann Eccles, Marjorie Torchon
PeopleSoft	Benefits	Aaron	Kris Twesme*, Marty Mastascusa
PeopleSoft	Benefits Administration	Aaron	Kris Twesme*, Marty Mastascusa
PeopleSoft	Campus Community	All	Many
PeopleSoft	Contributor Relations	Mydhili	Ann Diaz-Barriga*, Ellen Trantas*, Megan Ward*, Juliet Jeter
PeopleSoft	Financial Aid	Darnay	Ethel Desmarais, Kim Folkes*, Margie Ralph
PeopleSoft	Human Resources	Aaron	Kris Twesme*, Joe Bucci
PeopleSoft	Institutional Research	All	Margie Ralph*, Mark Freeman
PeopleSoft	Payroll	Aaron	Betsy Stewart, Christine Eigenbrot*
PeopleSoft	President	Aaron	Ruth Lindeborg*
PeopleSoft	Provost	Rhiain	Beth Shepard-Rabadam*
PeopleSoft	Student Financials	Aaron	Betsy Stewart, Carole Steiner*
PeopleSoft	Student Records	Rhiain	Kirsten OBeirne*, Diane Crow*, Nancy McCool, Lea Miller
RMS	Residential Life	Rhiain	Angie Sheets