Vista Implementation
Project Definition Document
For:
Connecticut Community Colleges &
Connecticut Distance Learning Consortium

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WebCT Professional Services Organization
Version 2.0 – July 30, 2004
# Table of Contents

- **Table of Contents** ............................................................................................................. 2
- **Confidentiality** ..................................................................................................................... 3
- **Overview** ............................................................................................................................... 4
- **1. Project Team Roles & Responsibilities** ........................................................................ 5
  - 1.2 Core Project Team ........................................................................................................... 5
  - 1.2 WebCT Team, Contacts & Project Roles ........................................................................ 6
- **2. Project Workstreams** ..................................................................................................... 7
  - 2.1 Project Administration ..................................................................................................... 7
  - 2.2 Vista Technical Build ....................................................................................................... 9
  - 2.3 System Integration Build ................................................................................................. 11
  - 2.4 Teaching & Learning Planning ...................................................................................... 12
  - 2.5 E-Learning Asset Migration & Management .................................................................. 14
  - 2.6 Training .......................................................................................................................... 15
  - 2.7 Support .......................................................................................................................... 17
  - 2.8 Communication Strategy & Delivery ............................................................................. 18
  - 2.9 Tracking & Reporting ...................................................................................................... 20
- **3. Project Constraints & Influences** ............................................................................... 21
  - 3.1 Organizational ................................................................................................................ 22
  - 3.2 Technological .................................................................................................................. 22
- **4. Projected Scope of Implementation Phases** ................................................................. 22
  - 4.1 Overview ......................................................................................................................... 22
- **5. Strategic Project Timeline** ........................................................................................... 23
  - 5.1 Overview ........................................................................................................................ 23
- **6. Project Risks and Mitigation Strategies** ................................................................. 24
  - 6.1 Managing Project Risk ................................................................................................. 24
- **7. Project Action Items** .................................................................................................. 26
  - 7.1 Organizational ................................................................................................................. 26
  - 7.2 Technical ........................................................................................................................ 26
- **8. Additional Recommendations** .................................................................................... 27
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OVERVIEW

This document was produced as a result of the WebCT Vista Strategic Implementation Planning consultation service conducted with administration, faculty and staff of the Connecticut Community Colleges and the Connecticut Distance Learning Consortium on May 20 and 21, 2004. It was updated based on the Project Planning consultation on June 28, 29 and 30, 2004. The intended purposes of this document are as follows:

1. Define the estimated Scope of the overall Vista initiative.
2. Outline the major workstreams to be undertaken for the Vista implementation in the areas of the Vista Technical Build, System Integration, Training and others.
3. Identify key project Risk factors for the success of the Vista implementation initiative and strategies to mitigate those Risks.
4. Establish the overall Strategic Timeline for the Vista implementation effort.
1. **PROJECT TEAM ROLES & RESPONSIBILITIES**

1.2 **Core Project Team**

Critical to the successful implementation of any enterprise software application is the formation of a “Core Implementation Team,” assembled from key constituencies at an institution. Since the Connecticut Community Colleges Vista Implementation project involves the Connecticut Distance Learning Consortium, the Community Colleges System Office and the Colleges themselves, the construction of this team is particularly important. The following individuals were participants in the Vista Implementation Strategy and Project Planning consultations at the Connecticut Community Colleges.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Claffey</td>
<td>CIO, CTDLC</td>
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</tr>
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</tr>
<tr>
<td>Tobi Krutt</td>
<td>Training Manager, System</td>
<td><a href="mailto:tkrutt@commnet.edu">tkrutt@commnet.edu</a></td>
</tr>
<tr>
<td>Bob Zabek</td>
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<td><a href="mailto:rzabek@commnet.edu">rzabek@commnet.edu</a></td>
</tr>
<tr>
<td>Jama Yusuf</td>
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</tr>
<tr>
<td>Ken Elterich</td>
<td>Data Center, System</td>
<td><a href="mailto:kelterich@commnet.edu">kelterich@commnet.edu</a></td>
</tr>
<tr>
<td>Terry Jordan</td>
<td>Banner Student/Academic Team</td>
<td><a href="mailto:tjordan@commnet.edu">tjordan@commnet.edu</a></td>
</tr>
<tr>
<td>Francine Skalicky</td>
<td>Banner Student/Academic Team - Project Manager Vista</td>
<td><a href="mailto:fskalicky@commnet.edu">fskalicky@commnet.edu</a></td>
</tr>
<tr>
<td>Barbara Thompson</td>
<td>Data Center Director, System</td>
<td><a href="mailto:bthompson@commnet.edu">bthompson@commnet.edu</a></td>
</tr>
<tr>
<td>Bill Burnes</td>
<td>Technical Support, CTDLC</td>
<td><a href="mailto:wburnes@ctdlc.org">wburnes@ctdlc.org</a></td>
</tr>
<tr>
<td>Cathy Manly</td>
<td>Distance Learning Coordinator, Manchester CC</td>
<td><a href="mailto:emanly@mcc.commnet.edu">emanly@mcc.commnet.edu</a></td>
</tr>
<tr>
<td>Jack Needham</td>
<td>Banner Web Project Leader</td>
<td><a href="mailto:jneedham@mcc.commnet.edu">jneedham@mcc.commnet.edu</a></td>
</tr>
<tr>
<td>Rusty Nicholas</td>
<td>System Data Center</td>
<td><a href="mailto:anicholas@commnet.edu">anicholas@commnet.edu</a></td>
</tr>
<tr>
<td>Margi Winters</td>
<td>Distance Learning Coordinator, Tunxis CC</td>
<td><a href="mailto:mwinters@txcc.commnet.edu">mwinters@txcc.commnet.edu</a></td>
</tr>
<tr>
<td>Mona Florea</td>
<td>Librarian, Three Rivers CC</td>
<td><a href="mailto:mflorea@trcc.commnet.edu">mflorea@trcc.commnet.edu</a></td>
</tr>
<tr>
<td>Kim Hamilton Bobrow</td>
<td>Vista Implementation Team, Faculty MCC</td>
<td><a href="mailto:khamilton-bobrow@mcc.commnet.edu">khamilton-bobrow@mcc.commnet.edu</a></td>
</tr>
<tr>
<td>Steve Gorman</td>
<td>Project Manager, CSU</td>
<td><a href="mailto:gormans@so.ct.edu">gormans@so.ct.edu</a></td>
</tr>
</tbody>
</table>
Some of the above participants, as well as those listed below, attended the Technical Implementation Planning on June 1 and 2, 2004.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doug Cook</td>
<td>DBA</td>
<td><a href="mailto:dcook@commnet.edu">dcook@commnet.edu</a></td>
</tr>
<tr>
<td>John Derman</td>
<td>DBA</td>
<td><a href="mailto:jderman@commnet.edu">jderman@commnet.edu</a></td>
</tr>
<tr>
<td>Mike Schuster</td>
<td>Programmer/integration</td>
<td><a href="mailto:mschuster@commnet.edu">mschuster@commnet.edu</a></td>
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<td>Tim Hilbie</td>
<td>Director, Technical Services</td>
<td><a href="mailto:thilbie@commnet.edu">thilbie@commnet.edu</a></td>
</tr>
<tr>
<td>Matt Pickering</td>
<td>Network Administrator, CTDLC</td>
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</tr>
<tr>
<td>Tejas Gandhi</td>
<td>Developer, CTDLC</td>
<td><a href="mailto:tgandhi@ctdlc.org">tgandhi@ctdlc.org</a></td>
</tr>
</tbody>
</table>

WebCT recommends that CCC/CTDLC select a limited group from these participants and others designated as project sub team members to be responsible for the overall management, guidance and decision making for the Vista implementation effort. A working model that has been successful elsewhere is to designate the ‘core team’ as the Project Administration sub team plus the designated leaders of the other workstream focused sub teams. This arrangement provides a better management view into the progress and coordination of the many components of the project.

1.2 WebCT Team, Contacts & Project Roles

WebCT is also a Stakeholder in CCC/CTDLC’s successful implementation of Vista. The WebCT representatives vested with the responsibility of ensuring CCC/CTDLC’s project success are:

- Jim Thibeau, Engagement Manager
- Steve Wertheim, Principal Consultant

Who to Contact

<table>
<thead>
<tr>
<th>Issue Type</th>
<th>CCC/CTDLC Contact</th>
<th>WebCT Contact</th>
<th>Contact Phone / Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td>Core Team, Project Manager</td>
<td>Steve Wertheim</td>
<td>(781)309-1151 <a href="mailto:steve.wertheim@webct.com">steve.wertheim@webct.com</a></td>
</tr>
<tr>
<td>Service</td>
<td>Project Manager</td>
<td>Jim Thibeau</td>
<td>(781)309-1017 <a href="mailto:jim.thibeau@webct.com">jim.thibeau@webct.com</a></td>
</tr>
<tr>
<td>WebCT base</td>
<td>Application Administrator</td>
<td>WebCT Tech Support</td>
<td><a href="mailto:support@webct.com">support@webct.com</a></td>
</tr>
<tr>
<td>Product</td>
<td></td>
<td></td>
<td>(named support contacts)</td>
</tr>
<tr>
<td>WebCT Billing</td>
<td>Project Manager</td>
<td>Jim Thibeau</td>
<td>(781)309-1017 <a href="mailto:jim.thibeau@webct.com">jim.thibeau@webct.com</a></td>
</tr>
</tbody>
</table>
2. Project Workstreams

During the consultation we discussed the advantages of organizing labor and resources around a defined set of project workstreams, as follows:

1. Project Administration
2. Vista Technical Build
3. System Integration Build
4. Teaching & Learning Planning
5. E-Learning Asset Migration & Management
6. Training
7. Support
8. Communication Strategy & Delivery
9. Tracking & Reporting

The following sections identify the sub-teams established for each of these workstreams within the CCC/CTDLC Vista Implementation project, the major milestones identified for each team, as well as any planning details and issues uncovered that will need to be evaluated and discussed further during the next detailed planning consultation.

2.1 Project Administration

This workstream is principally concerned with the project management functions of the WebCT Vista implementation, and as such, should consider the following tasks:

- Developing & deploying management processes
- Developing & deploying escalation paths
- Overall project management concerns and workstream coordination
- Communication (within groups; with WebCT)

Team Members: Vista Implementation Team

Team Lead: Francine S. Kevin C.

Tasks & Milestones:

- Re-examine subteam members
  - Balance effort and potentially include others
  - Make sure DL coordinators are assigned to at least 1 committee
- Establish the overall project timeline in relation to critical dates and impacts of other CCC/CTDLC initiatives
- Identification and allocation of project resources
- Schedule needed WebCT Services
- Develop & manage to detailed Project Plan
- Develop communication strategy
• Create additional communication resources for Project Sub-teams
• Schedule meetings and charge subteams
  ▪ Organizational meeting of workstream leads
  ▪ Expectations of subteams
  ▪ Wider implementation team
• Notify all sub-team members of their anticipated project roles
• Investigate use of Sharepoint services or Netmeeting to address distance/travel issues
• Set up WebCT shells for subteams
• Project management communications to Administration, faculty, councils
• Manage the schedules of events/communications to target to those events
  ▪ Oversee schedule of subteams
  ▪ Systematize communications - documentation, status reports of sub-teams
  ▪ Project planning and tracking
• Maintain connections to the other entities in the statewide consortium
  ▪ Technical group
  ▪ Training group
  ▪ Executive committee
• Investigate policies and implications for the Vista project
  ▪ Incompletes
  ▪ Term-based vs. date-based organization
  ▪ End of semester
    ▪ Retention of student activity
    ▪ Archiving
• Review policies that were put in place for CE
  ▪ Maintenance of course shells (currently 1 year)
  ▪ Access date for students
  ▪ Backup and restore
• Define Responsibilities / Recommendations for Campuses
  ▪ Campus Vista Project team
  ▪ Responsibilities of DL coordinator
  ▪ Participation in Pilot project
  ▪ Identifying faculty liaisons
  ▪ Lines of tech support - escalation path
  ▪ Housekeeping in the File manager and Template Manager
  ▪ Anti -Virus recommendation
• Define Responsibilities / Recommendations for Faculty
  ▪ Backups of their content, ownership of content, managing templates,
  ▪ contacting students who are not participating
  ▪ Anti -Virus recommendation
• Define Responsibilities / Recommendations for Students
  ▪ Protocol for obtaining tech support
  ▪ Browser support and configuration
  ▪ Anti -Virus recommendation
2.1.1 Business Processes & Policies

The following processes and policies at CCC/CTDLC might be impacted by the Vista implementation or may require review / reconsideration:

<table>
<thead>
<tr>
<th>Process Type</th>
<th>Process</th>
<th>Anticipated Impact or Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Administration</td>
<td>Course Requests</td>
<td>Change in system entry procedures</td>
</tr>
<tr>
<td>System Administration</td>
<td>Add Change of Administrator, Designer roles in Vista etc.</td>
<td>Change in process for maintenance and creation of WebCT Vista roles and permissions.</td>
</tr>
<tr>
<td>Enrollments / Registrations</td>
<td>Add new online students</td>
<td>Vista integration with Banner/LDIS should be functionally similar, but will be different technically than the current MMB integration. Custom functionality of the MMB integration will need to be replicated.</td>
</tr>
<tr>
<td>Online Course Management</td>
<td>Add New Course</td>
<td>Via Banner/LDIS integration</td>
</tr>
<tr>
<td>Online Course Management</td>
<td>Course Cancellation</td>
<td>Via Banner/LDIS integration</td>
</tr>
<tr>
<td>Online Course Management</td>
<td>New Course Setup</td>
<td>Change in procedures. Involves association of template to Course and assignment of template to Section</td>
</tr>
<tr>
<td>System Administration</td>
<td>Backup &amp; Archive</td>
<td>New process and procedures</td>
</tr>
</tbody>
</table>

2.2 Vista Technical Build

This workstream is principally concerned with configuring and maintaining the WebCT Vista server cluster and integrating WebCT Vista with other systems at the institution, and as such, should consider the following tasks:

- Vista Learning Context design and configuration
- Deployment Planning
- Hardware selection
- Installation & optimization
- Backup & recovery procedures
- Content migrations/conversions

**Team Members:** Kevin C., Matt P., Bill B., George C., Francine S., Terry J., new hire

**Lead:** Kevin C.

**Tasks & Milestones:**
• Technical & deployment planning w/ WebCT
• Receive test system
• Configure test cluster
• Configure SAN
• WebCT pre-install call
• Install Oracle, WebLogic, Vista
• Receive Vista Server Administration Training
• Establish performance configuration and best practices for Solaris
• Test cluster
  ▪ Maximum concurrent user sessions
  ▪ Network performance
  ▪ Performance of integration
  ▪ Public bandwidth needs
• Develop backup and recovery plans and procedures
  ▪ Disaster recovery scenarios
  ▪ Application tier, database tier
• Determine load balancing needs & solutions
• Evaluate Anti-virus hardware
• Perform Administrative migration
  ▪ Needs list from campuses of course shells to be migrated
  ▪ Needs guidance on CE 3.8 -> Vista 3.0
  ▪ Identify necessary hardware for CE 4.x staging
  ▪ Identify CE 3.8 to 4.1 upgrade path
  ▪ Develop/customize scripts for batch migration
• Test end to end migration (throughput)
• Schedule Vista Production Administration and Maintenance training
• Order, receive production system

2.2.1 Learning Context Design

Learning Context Definitions for Use at CCC/CTDLC

<table>
<thead>
<tr>
<th>Learning Context Level</th>
<th>Used By</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution</td>
<td>CCC Institution</td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td>Colleges</td>
<td>Determined by SCT Banner LDIS integration</td>
</tr>
<tr>
<td>Category</td>
<td>Department</td>
<td>Determined by SCT Banner LDIS integration</td>
</tr>
<tr>
<td>Course</td>
<td>Courses</td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Sections</td>
<td></td>
</tr>
</tbody>
</table>
Initial Vista Administrator & Designer Role Assignments at CCC/CTDLC

This is to be filled in by the implementation team.

<table>
<thead>
<tr>
<th>Vista Learning Context</th>
<th>Administrators</th>
<th>Designers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server</td>
<td>Kevin C.</td>
<td></td>
</tr>
<tr>
<td>Domain</td>
<td>Kevin C. Bill B.</td>
<td></td>
</tr>
<tr>
<td>Institutions</td>
<td>Kevin C., Bill B., Jama Y., Rusty N.</td>
<td></td>
</tr>
<tr>
<td>Groups</td>
<td>DL Coordinators</td>
<td>DL Coordinators</td>
</tr>
<tr>
<td></td>
<td>Francine S. Terry J., new hire,</td>
<td>Francine S. Terry J., new hire,</td>
</tr>
<tr>
<td></td>
<td>Tobi Krutt</td>
<td>Tobi Krutt</td>
</tr>
</tbody>
</table>

2.3 System Integration Build

This workstream is principally concerned with integrating WebCT Vista with other systems at the institution, and as such, should consider the following tasks:

- Integration with SunGard SCT Banner Student Information System via LDIS
- Prepare for future authentication / single Sign-on
- Integration with other Systems as resources are available (Wimba, Libris)

**Team Members:** Jama Y., Kevin C., Mark Q., George C., (Karen Z.), Rusty N., Jon D., Doug C., Francine S., Terry J., Larry Davenport

**Lead:** Jama Y

**Milestones:**

- Upgrade test Banner with IntComp 6.1
- Upgrade test Banner to Student 6.1
- Install LDIS
- Install and configure Vista LDIS adapter.
- Re-establish the VPN tunnel between CTDLC and CCC System office
- Identify hardware for LDIS/ LMB
- Identify production Banner hardware
- Verify that we can
  - Use templates in a manually created Learning Context Hierarchy
  - Move those templates to new Institution created by the LDIS integration
  - Associate templates to courses (manual or script)
  - Assign templates to sections (manual or script)
- Develop MMB - > LDIS cutover plan
- Set up/enable integration component in Banner
• Apply Banner content modification to support integration
• Test
  ▪ Test Banner components for transmission to Vista
• Investigate possibility of grade exchange
  ▪ Resolve W grade issue
  ▪ Test Grade exchange
• Develop report of failed integration events
• Develop report of Failed grade exports Vista > Banner
• Monitor LMB to Vista bandwidth usage
• Assess system resource needs of the LMB
• Assess system resource needs of LMB queue
• If Luminis Portal is in the Sept 05 timeframe, investigate SSO
• Investigate Wimba
  ▪ continuance
  ▪ integration
• Develop scripts to automate template assignment
• Review implications of Common Course Numbering to VISTA project
• Investigate development process to combine multiple sections into one section (for discussion purposes)

2.4 Teaching & Learning Planning

This workstream is principally concerned with insuring that WebCT Vista achieves institutional best practices concerning Online Teaching and Learning standards (OTL), and as such, should consider the following tasks:
  • Defining OTL standards & best practices that align with mission/strategic goals
  • Determining ways to rollout & support these

Team Members: Cathy M., Mona F., Kim H., Bill B., Bob Z., Kathie F., Margi W., Colleen Keyes, CFT # 1, CFT #2, Kathy C., Cheryl Turgeon

Lead: Cathy M., Center For Teaching TBD

Tasks & Milestones:

• Identify relevant standards, guidelines & practices for course development and delivery
  ▪ Guidelines for supplemental online use of Vista
  ▪ Guidelines for fully-online use
  ▪ Methods for rollout and monitoring of guidelines

• Communicate online course standards, guidelines and practices to:
  ▪ E-Learning Asset Mgmt. team
  ▪ Administration
  ▪ Deans and Dept. Chairs
  ▪ Faculty
Instructional Designers
- Determine methods for measuring and evaluating use of standards (Quality Assurance)

Strategic Learning and Teaching engagement:
- Facilitate the raising of e-learning to the strategy level within colleges
- Use the Vista launch to ramp up awareness at a strategic level across the colleges
- Actively involve the Center for Teaching in the Vista project
  - Work with CFT on faculty professional development
- Incorporate American Council of Research Libraries evaluation of readiness
- Develop and establish models for best practice e-learning and encourage uptake
- Tie Vista into the technology standards through AITAC (Academic IT Advisory Committee)
- Identify keys issues for e-learning success (of which Vista is a part) and ensure appropriate bodies / individuals forward them
- Embed Vista into the broader set of initiatives currently being forwarded across the colleges e.g. within general education
- Communicate with staff of academic initiatives - e.g. Gen Ed curriculum requirements
- Create opportunities to emphasize the possibilities for deploying Vista to enhance learning and teaching and collaboration with a focus on the benefits for faculty
- Make use of common content opportunities
  - ePacks, SCORM modules

College preparation for rollout:
- Encourage the creation of College Vista Project Teams
- Communicate rollout requirements to a “Vista college team”. It is anticipated that the team will include:
  - DL co-coordinators
  - Academic Deans
  - Representatives of CFT (Center for Teaching)
  - AITAC person
  - Faculty liaisons (need to be identified)
- Establish default set-ups for Vista roles, templates, branding etc. that may be deployed by colleges where required
  - DL coordinator can facilitate academic discussion of developing this
- Inform, educate and support colleges who wish to develop their own deployment models for Vista

Opportunities to promote Vista to the academic community:
- Promote Vista and e-learning at the Professional development workshop (1 day)
- Highlight Vista capabilities for
  - content sharing cross institutions and disciplines
  - collaborative working
  - drawing on externally developed content e.g. ePacks or SCORM
2.5 E-Learning Asset Migration & Management

This workstream is principally concerned with insuring that content, templates and other digital/e-learning assets are managed appropriately through the configuration of WebCT Vista, and as such, should consider the following tasks:

- Migration/Conversion
- Template Management (inclusive of protocols & policies governing use)
- Content Management (inclusive of protocols & policies governing use)

Note: This workstream is affected by decisions made in Teaching & Learning Planning stream

Team Members: Cathy M., Francine S., Jama Y., Kevin C., Tobi K., Rusty N., Mona F., Terry J., Margi W.

Lead: Cathy M.

Tasks & Milestones:

- CE to Vista Content migration
  - Develop migration strategy & approach
  - Conduct / support physical migration
- Inventory / identify courses for migration vs. rebuild
  - Pilot courses
  - Fall 05 courses
  - Subsequent terms
  - Special use sites (WebCT2)
- Restore backups for courses that are offline
- Adjust course request process as needed
- Identify opportunities for content sharing in some pilot courses
- Identify decision points for role assignments and their implications
  - Identify minimum level of authorization for faculty
  - Identify tiers above that
  - Create process for managing these enrollments
- Apply campus policies in templates, Learning Context Hierarchy
- Develop initial templates
  - System templates
  - College templates
    - Friendly section not in use message
    - Tool evaluation & selection for suggested New User tool set
  - Develop naming convention for templates
  - Develop scripts to automate template assignment
  - Investigate alternatives to end of semester template promotion
- Test content sharing
  - Course templates that are shared among multiple sections
  - College content shared among courses/sections
- Investigate Library e-reserves - connection to Libris
- Determine content management practices regarding:
2.5.1 Migration & Conversion

For the initial phase of rollout the course materials will be migrated from existing courses within WebCT Campus Edition 3.8. No new content development will be required, however some redesign may be required or desirable to take better advantage of tools within Vista to expand functionality of those migrated Courses.

- It is recommended that a separate Campus Edition 4.1 server be set up as a migration bridge between CE 3.8 and Vista 3.0.

- Migration of roughly 1,600 courses in one term will be a challenging task. It is recommended that the volume of courses that can be migrated in a given period of time ("migration bandwidth") be assessed as early in the project as possible. The assessment must take into account both the administrative time and the faculty/designer time required for migration.

2.5.2 Course Templates

No specific course template requirements have been determined yet. After further training in Vista it may be helpful to the CCC/CTDLC team to track template development requirements in a table similar to the sample provided below.

<table>
<thead>
<tr>
<th>Learning Context</th>
<th>Course</th>
<th>Target Date</th>
<th>Source</th>
<th>Template</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Sciences Group</td>
<td>Soc1011</td>
<td>09/05/04</td>
<td>Migrate</td>
<td>None</td>
</tr>
<tr>
<td>Engineering Group</td>
<td>Eng3005</td>
<td>09/05/04</td>
<td>Migrate</td>
<td>None</td>
</tr>
<tr>
<td>Earth Sciences Group</td>
<td>Geo1020</td>
<td>10/05/04</td>
<td>New</td>
<td>T-ES1000</td>
</tr>
</tbody>
</table>

2.6 Training

This workstream is principally concerned with elevating end user proficiency with the WebCT Vista platform for teaching and learning, and as such, should consider the following tasks:

- Designing & delivering programs for core designers & faculty
- Designing & delivering programs for Pilot users (faculty, designers, academic support staff, students)
- Needs to support Pilot project
• Resource constraints and solutions
• Other, peripheral needs
• Developing programs to provide on-time assistance
• Developing programs to leverage experience & skills throughout the academic community to support, sustain and cultivate use of Vista

**Team Members:** Tobi K., Francine S., Terry J., Cathy M., Steve M., Yi G., Steve S., Timberly B., Center For Teaching TBD, Sandra C.

**Sub-team:** Campus training staff

**Lead:** Tobi K.

**Tasks & Milestones:**

- Identify training needs/groups (by team)
- Receive WebCT training
  - Technical track
  - ID / Faculty track
- Determine delivery approaches
- Customize training
- Review documentation and materials
- Identify what can be shared among institutions
- Modularize training to make customization easier
- Scheduling times for faculty training
- Plan for building training capacity
- Define campus vs. System Office responsibilities
- Address transfer of training issues
- Communicate to and get buy-in from
  - Department chairs and Deans
  - DL coordinators
  - Department administrators
- Encourage / identify faculty to become liaisons
  - Encourage Deans that being a liaison is appropriate use of 20% release time
- Define requirements for local training and support given the number of courses that must be migrated
  - Require analysis, feedback
  - Define needed backup from system level where college resources can't
- Identify local resources, capacity, ability and willingness to deliver local training
- Develop orientation sessions for students
  - Look at WebCT orientation course
- Create resources for getting started with WebCT Vista
  - 1 stop shopping website (3 institutions, shared training)
• links to resources (development paths for experiences people, new users)
  • links to classroom training, online classes, doc, how-to movies
  • online schedule and registration for training events
• Identify a maintenance strategy for new needs & to incorporate changes due to new versions, processes, etc.

2.7 Support

This workstream is principally concerned with supporting the immediate needs of end users of the WebCT Vista platform and as such, should consider the following tasks:
• Augmenting existing support staff/structures with Vista knowledge and procedures
• Designing & delivering support programs for pilot users (designers, faculty, students)
• Long-term support needs
• Needs to support Pilot project
• Resource constraints and solutions
• Other, peripheral needs
• Developing programs to provide on-time assistance

Currently, the WebCT support systems for faculty are the DL coordinator and other faculty. Students primarily are supported via their campus Help desk. The CTDLC Help Desk and the Banner team at System Office provide a second level of support. The CTDLC is enhancing their FAQs, creating searchable knowledge base and an online ticketing system. In this system the top 5 issues will always be visible.

The team discussed creating three levels of faculty support on the campuses. Currently all campuses do not have all three levels of support (plus system office support).
• DL coordinator
• Coordinator's staff
• Faculty liaisons
• System Office support

Team: Francine S., Bill B., Kathie F., Terry J., Kevin C., Eileen M., Mona F., Sarah C.

Lead: Francine S., Bill B.,

Tasks & Milestones:
• Coordination of efforts with the Training sub-team
  • Determine needs for:
    • Training
    • Materials
  • Develop strategy for rollout readiness
    • Include College Distance Learning coordinators and staff
• Determine ‘key players’ to train for supporting first wave of users who can/will also help to train others
• Develop ‘call-down lists’ etc. for Vista support procedures
• Support client computer readiness
• Create tools for & ensure online / Vista readiness for Students

• Train Help Desk staff
• Provide information about computer, browser requirements
• Compile common Help Desk questions
  • Use this to identify training gaps
• Create materials for Help Desk
  • Decision tree
• Create manual of Short reference materials - "how-to"s in Division office
• Create Information for DL coordinators and CTDLC on System Office role and escalation
• Identify and communicate about designated Support contact
• Establish local Vista user groups
• Establish Vista listserv
• Use Sharepoint server and similar for online collaborative development
• Develop Coached support in Learning Labs "hands-on" help hours.
• Develop Training, Materials, background information for
  • Library
  • college learning center/ academic skills center
  • computing labs
• Create communication for IT directors and help staff managers about potential Vista issues
• Write articles on Vista for (new) system office IT Newsletter
• Develop formalized alert mechanism for problems
  • Notifications
  • Emergencies
  • Outages
• Assess technology literacy of incoming students -
  • Accuplacer test
  • Locally created technology literacy assessment that could be used by all colleges,
  • CTDLC questionnaire
• Create and administer User Survey of primary local support structure and primary local constraints
• Communicate System Office need for context and details of issues

2.8 Communication Strategy & Delivery

This workstream is principally concerned with conveying information to key institutional constituencies and end users, and as such, should consider the following tasks:

• Developing communication strategies
• Managing change


Lead: Francine S. and Bob Z.

The following communication issues were identified:

• Need to develop a Communications Strategy and Action Plan
• Council issues:
  ▪ Variable attendance
  ▪ Minutes not read
  ▪ Communications / actions not forwarded, lack of ownership
• More specific targeting of appropriate audiences at the colleges is needed
• Reliability / completeness of email address list, particularly for part-time staff
• Who we target and how - dependent on where we are in the project

Tasks & Milestones:

• Create Communications Plan - identify channels, audiences, schedules
• Provide timely project information to:
  ▪ Executive leadership
  ▪ Academic Deans / leadership
  ▪ Faculty / CFT
  ▪ DLCs
  ▪ Students
  ▪ College administration
  ▪ SDC and IT college staff
• Communicate regarding:
  ▪ Key dates
  ▪ Key events
  ▪ Impact & Expectations
  ▪ Training opportunity announcements
  ▪ Press Releases
• Determine Methods and Channels
  ▪ Councils – e.g. Admissions Officers, Academic Deans, DL Co-coordinators
  ▪ Email lists
  ▪ Academic Deans – critical to identify resources, which will include communications
  ▪ Deploy all existing channels but plug holes where they exist
  ▪ System Distribution list
• Create Internal / Project communications
  ▪ Distribution list
  ▪ Meeting schedule
  ▪ Communication with Councils
• Vista web site (Intranet) - minutes and other information that may be useful
• Create College communications
  ▪ Identify who should be the target within the colleges
    o Councils, DL co-ordinators, and others (Library, IT) ?
  ▪ Vista College Teams - team leaders need to be identified
• Create wider audience communications
  ▪ Press releases need to be co-ordinated and effectively managed
  ▪ Faculty success stories with WebCT to be pulled together via college marketing teams
  ▪ Draw on various PR teams to manage critical external communications. It is important to ensure they are aware of the project, and its activities.
  ▪ Promotion within the student community e.g. student newsletters
  ▪ Develop marketing materials
  ▪ Develop 5 min promotional video for Vista project.
• Critical Communications
  ▪ Pilot communication: Write letter for Bob to send to Academic Deans - List of key characteristics for Pilot courses (Academic Deans will nominate). Goal is 1 - 2 pilot courses from each college with a max of 18.
    o Every campus
    o Range of disciplines
    o Power users, novices
    o Courses with shared sections
    o 50% fully online courses
    o Courses that make full use of the platform
  ▪ Presidents, Deans - A key activity would be the College kick-off suggested for Spring 2005.

2.9 Tracking & Reporting

This workstream is principally concerned with obtaining useful data from Vista as well as measuring the success of WebCT Vista in meeting institutional and implementation goals & objectives, and as such, should consider the following tasks:
  ▪ Determining reporting needs
  ▪ Designing & developing surveys, reports or other informational solutions
  ▪ Defining, tracking, evaluating success

Team Members: Tobi K., Bob Z., Francine S., Kathie F., Terry J., Jama Y., Rusty N., Kevin C., Corby C. (or Qing M.), Jack N., Steve M., Academic Dean TBD

Lead: Francine S. and Bob Z.
Tasks & Milestones:

- Identify what is important to monitor
- Evaluate Vista standard reports
- Determine additional reporting needs
  - Data
  - Audience
  - Frequency
  - Delivery method
- Define needed reports
  - Number sections used (all sections are created)
    - how many sections have content
    - by department
  - Names of faculty members who are using Vista by Group
  - Number of students using
  - Complexity of usage (number of components, types of components)
  - Report of failed integration events
  - Failed grade exports Vista > Banner
  - Disk usage per template/ per section
  - Track non-course usage (separate Group or Institution)
  - Concurrent usage
  - Evaluation of Vista Pilot:
- Gather data and Analyze results
- Track usage of Vista ‘peripherals’ e.g., Library Tools, etc.
- Obtain access to statistics for tracking of defined Project Success Measures, e.g., Support call logs, etc.
- Measure and evaluate degree of real content sharing
- Compile Instructor ‘best practices’ for evaluation
- Investigate options for surveys, evaluations in Vista
  - End of course evaluation options
- Develop Survey outside Vista
  - Was Vista part of your course?
  - Did you use it?
  - Would you like to see it used?
- Involve Academic Deans in
  - Defining reporting requirements
  - Overseeing teaching & learning
- Work with Institutional Research on reporting needs

3. Project Constraints & Influences
The following ongoing or contemplated projects may represent constraints or requirements for the Vista implementation. Their specific effect on the implementation will need to be prioritized and reflected in the project plan.

3.1 Organizational

- Common course numbering project
- Course revamping based on Department of Higher Education Mandates

3.2 Technological

- Banner LDIS implementation
- Banner upgrade to Banner V7 at end of the Vista implementation
- Luminis Portal deferred implementation
- Active Directory implementation

4. Projected Scope of Implementation Phases

4.1 Overview

The combined enrollment of the Community Colleges is roughly 50,000 students. Currently in WebCT CE, CCC/CTDLC hosts approximately:

- 8,000 courses per term
- 24,000 total course shells

It is estimated that 3,000 of these shells have enough content to migrate. Roughly 60% of these would be taught in Fall ‘05.

The general priorities for the rollout of Vista are as follows:
- Support migration of existing WebCT users
- Accommodate new users

The initial phase is to be a Pilot program in the Spring 2005 term defined as follows:

The Pilot will not be integrated with Banner. The primary goals of this Pilot program are:
- Better understand the effort required to get the remaining courses migrated
- Allow lead faculty to experience the new teaching and learning features of Vista
- Begin to refine templates
- Make clear future Training & Support needs determinations
- Make the pilot program a positive experience so the Pilot group can be marketers, trainers, advocates for Vista
In the Summer of 2005 the Banner LDIS Integration is scheduled to go live and all Fall 2005 courses will be in Vista. This creates a large migration task for the Spring and Summer of 2005.

## 5. Strategic Project Timeline

### 5.1 Overview

This timeline represents a highly summarized view of the work required to complete the Vista implementation. A detailed Project Plan with a full work breakdown structure will be produced collaboratively by CCC/CTDLC and WebCT during the next phase of implementation consultation.

### Implementation Timeline

<table>
<thead>
<tr>
<th>Project Phase</th>
<th>Milestone</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement test infrastructure</td>
<td>Receive test hardware</td>
<td>September, 2004(early)</td>
</tr>
<tr>
<td></td>
<td>Configure test hardware</td>
<td>August, 2004</td>
</tr>
<tr>
<td></td>
<td>Installation of Vista test implementation</td>
<td>August, 2004</td>
</tr>
<tr>
<td>Training &amp; Support</td>
<td>Core Team Training</td>
<td>September (late), 2004</td>
</tr>
<tr>
<td></td>
<td>Local training and support materials development</td>
<td>Fall Term, 2004</td>
</tr>
<tr>
<td></td>
<td>Local Training</td>
<td>Fall Term, 2004</td>
</tr>
<tr>
<td>Initial migration and course development</td>
<td>Migration of initial pilot courses Testing Migration Process</td>
<td>Fall Term, 2004</td>
</tr>
<tr>
<td>Integration development</td>
<td>Banner integration is working in test site</td>
<td>Fall Term, 2004</td>
</tr>
<tr>
<td>Implement production infrastructure</td>
<td>Order production hardware</td>
<td>November, 2004</td>
</tr>
<tr>
<td></td>
<td>Receive and configure production hardware</td>
<td>December, 2004</td>
</tr>
<tr>
<td></td>
<td>Installation of Vista production implementation</td>
<td>December, 2004</td>
</tr>
<tr>
<td>Pilot</td>
<td>Migration or Redevelopment of Pilot courses</td>
<td>November, 2004</td>
</tr>
<tr>
<td></td>
<td>Training of Pilot Faculty</td>
<td>November, December 2004</td>
</tr>
<tr>
<td></td>
<td>Pilot begins</td>
<td>Spring Term 2005</td>
</tr>
<tr>
<td>Evaluation</td>
<td></td>
<td>Spring Term 2005</td>
</tr>
<tr>
<td>Rollout</td>
<td>Major Migration or</td>
<td>Spring Term 2005</td>
</tr>
</tbody>
</table>
6. Project Risks and Mitigation Strategies

6.1 Managing Project Risk

The Project Team identified the following factors as possible risks affecting the outcome of the Vista implementation initiative. Where possible, strategies to reduce the risks and/or responsibility for managing them were identified.

<table>
<thead>
<tr>
<th>RISK</th>
<th>MITIGATION STRATEGY</th>
<th>PROBABILITY</th>
<th>RESPONSIBLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insufficient Resources:</td>
<td>• Review resource utilization across colleges</td>
<td>H</td>
<td>Bob Z.</td>
</tr>
<tr>
<td>• Systems support (ongoing)</td>
<td>• Develop a “recommended” model for resource requirements at a local level</td>
<td></td>
<td>Paul S.</td>
</tr>
<tr>
<td>• Campus staffing</td>
<td></td>
<td></td>
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<tr>
<td>• Faculty training and support</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Lack of College commitment:</td>
<td>• Develop guidelines for project engagement</td>
<td>M</td>
<td>Bob Z. Paul S.</td>
</tr>
<tr>
<td>• Executive sponsorship</td>
<td>• Ensure structured and planned communications</td>
<td></td>
<td>Communication Team</td>
</tr>
<tr>
<td>• Academic leadership / drive</td>
<td>• Manage internal and external PR</td>
<td></td>
<td>Teaching &amp; Learning Team</td>
</tr>
<tr>
<td>• Faculty buy-in</td>
<td>• Improve internal communication channels with adjunct faculty</td>
<td></td>
<td></td>
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<tr>
<td>Staff changes and staff backup:</td>
<td>• Facilitate cross training</td>
<td>M</td>
<td>Bob Z. Support Team</td>
</tr>
<tr>
<td>• System</td>
<td>• Develop contingency plans</td>
<td></td>
<td>Training Team</td>
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<tr>
<td>• College</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Unexpected changes in Technology partnerships</td>
<td>• Consider contingency planning</td>
<td>L</td>
<td>Gerry P.</td>
</tr>
<tr>
<td>Inconsistent Campus Resources:</td>
<td>• Offer collaborative provision</td>
<td>M</td>
<td>Francine S.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Communication Team</td>
</tr>
</tbody>
</table>

Redevelopment, training
Integration live Summer 2005
Class rollout Fall Term 2005
Term rollouts Semester migrations or Redevelopment Spring, Summer 2006
Completion of transition to Vista Fall 2006
<table>
<thead>
<tr>
<th>Resistance to change:</th>
<th>Technology does not meet requirements:</th>
<th>Negative student or faculty perception / feedback</th>
<th>Lack of pilot success</th>
<th>Second server issues</th>
<th>Impact of collective bargaining</th>
<th>Integration with / impact of</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management</td>
<td>LDIS does not meet needs</td>
<td>Comprehensive testing and preparation</td>
<td>Comprehensive support and preparation</td>
<td>Ability to merge everything onto one server - requires further investigation</td>
<td>Participation in current negotiations</td>
<td>Comprehensive planning</td>
</tr>
<tr>
<td>Administrative staff</td>
<td>Unexpected downtime due to integration issues</td>
<td>Excellent communications with technology partners</td>
<td>Careful selection of pilot faculty</td>
<td>Endorsement from WebCT and SCT</td>
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<tr>
<td>Academic leadership</td>
<td>Unexpected downtime due to Vista issues</td>
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<tr>
<td>Academic faculty</td>
<td>Data corruption</td>
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<tr>
<td>Technical</td>
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<tr>
<td>Training Team Model - DL Council and Implementation. Team</td>
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<td>L &amp; T Team</td>
<td>L &amp; T Team</td>
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<tr>
<td>Resistance Team</td>
<td>Research and apply Technology Change Management strategies to the project</td>
<td>Comprehensive testing and preparation</td>
<td>Comprehensive testing, support, and preparations</td>
<td>Comprehensive support and preparation</td>
<td>Ability to merge everything onto one server - requires further investigation</td>
<td>Participation in current negotiations</td>
</tr>
<tr>
<td>Management</td>
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<tr>
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<td>L &amp; T Team</td>
</tr>
</tbody>
</table>
### 7. Project Action Items

#### 7.1 Organizational

- Assess administrative and financial implications of Vista client computer, browser requirements
  
- Need clarification if SSL for entire session is a business requirement
  
- The CCC team has requested the ability to transmit the training sessions via the Tegrity system. WebCT will provide guidance on whether use of video transmission or videotaping is possible.

#### 7.2 Technical

- Determine the implications for the Learning Context Hierarchy of the Banner integration
  
- Resolve term-based organization of SIS vs. date-based organization of Vista.
• Resolve issue of W grade which is an obstacle to enabling grade exchange. This comes from Title IV requirements around withdrawals.
  ▪ Faculty don't have right to withdraw student. If they do and they give W, there may be a question about the date that withdrawal happened, and therefore whether the student is entitled to a refund.
  ▪ In Integrated Banner/Vista, can faculty give W grade? If they can eliminate the W grade, that eliminates the problem.

• Get information on current state of Wimba integrations

• Investigate Library e-reserves - connection to Libris

• Determine whether common Help Desk questions are available from WebCT Support

• Determine how to handle groups, courses and enrollments that are not in Banner

• Determine how to provide access to a student’s CE and Vista courses
  ▪ No current portal

• Authentication and Security
  ▪ Decide on use of LDAP or Vista internal database

• Migration
  ▪ Get an update on CMU and migration strategy
    ▪ Version of CMU
    ▪ Intermediate migration to CE 4.1?

• Create inventory of courses for migration

8. ADDITIONAL RECOMMENDATIONS

The following is a list of recommendations made in order to enhance the success of the overall WebCT Vista implementation.

**Complete Definition of Success Measures and Evaluation Tools**
It is WebCT’s recommendation that these success criteria and metrics be further refined and quantified by the project team so that realistic measurements may be taken of the implementation's progress through tools such as surveys, statistics, direct interviews, etc.

**Develop and Manage the Implementation to a Detailed Project Plan**
An effort of this scope and breadth cannot be successfully coordinated without a central, comprehensive and coherent plan. The initial plan will be co-developed with WebCT during the
scheduled Project Planning consultation. Managing to the plan will assure that we all are aware of dates on the critical path and may conduct regular progress checks for the ongoing implementation efforts.

**Develop Support & Training Needs estimates**
(This issue will be addressed in more detail in the next onsite consultation.) In order to more effectively plan for the development of Training and Support facilities and their rollout, it is critical to understand the number, and needs, of Faculty, Staff and Students to be impacted at each major rollout phase of the implementation.

**Determine Technical Training needs**
In conjunction with WebCT Technical consulting staff it would be of value to the CCC/CTDLC team to quickly assess the technical skill sets it will require for the development and integration efforts and compare that to what is available with current staff. An action plan should also be developed to fill any gaps in required technological skill sets. This issue will be addressed in more detail in the next onsite consultation.

**Develop Issue and Status Reporting Mechanisms**
Establish the mechanisms required to track and communicate issues that surface over the course of your Vista Implementation project. The Project Administration team should consider means of addressing the following:

- Project issues and assignments for resolution
- Product issues and status of the issue with WebCT
- Status reporting from project team members
- Standards or tools to be used in communicating issues amongst team members or for posting to the issue logs.

**Evaluate Business Process Impacts**
Business processes such as those preceding the beginning of a term (new course request course creation or restoration, content development, enrollment) and at the end of a term (course archiving) should be evaluated and modified to suit the new Vista system administration model. For example, in Vista a basic sequence would be:

- Before beginning of a term:
  - New course request
  - Template creation
  - Content development
  - Course creation
  - Section creation
  - Template assignment
  - Enrollment

- After end of a term
  - Course archiving
  - Section promotion to template