**PROJECT CHARTER**

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| **Project Name:**  Smart Call Upgrade 9.8 | **Prepared By:**  Navin Ikramullah | **Date:**  27 June 2014 |
| **Customer/ End User Group:**  Creighton Fund | **Contact Name:**  Brian Diss/Christian Warneke | **Project Type: (S/M/L)**  Medium\* |
| **Business Unit:**  University Relations / Creighton Fund | **Technical Project Manager:**  Navin Ikramullah | **Project Sponsor:**  Kelly Ptacek |

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| **Executive Summary:** |

**Project Title/ Summary:**

**Smart Call Upgrade 9.8**

The project will entail upgrading the SmartCall application to version 9.8 from version 9.7. This will allow users to take advantage of new features, and bug fixes, and better serve their constituents. This project supports the Creighton Fundraising initiative by providing additional features on the application.

**Objective**

**To…**

* upgrade SmartCall version 9.7 to SmartCall version 9.8 and thoroughly test and implement by winter of 2014

**In a way that…**

* removes current limitations and provide additional features associated with existing SmartCall v9.7
* allows the phonathon staff to adequately test/train callers to take advantage of the new features from the new version of the software

**So that…**

* Phonathon managers and student callers can continue their tele-fundraising efforts and continue phonathon operations without interruption and stay competitive.

**Link to Strategic Objective:**

### Revenue

To attain the pledge commitment goal of >1.1M in the fiscal year 2015 in support of the overall Creighton Strategic goal of 3% to 5% by fiscal year 2017.

***“****Achieve improvements in revenue performance, increasing annual growth from 3 percent to 5 percent by fiscal year 2017.****”***

**Link to Strategic Initiative:**

* **Fundraising**

“*Enhance philanthropic opportunities to pursue our vision to unprecedented levels and advance the University as a national leader in preparing students for professional distinction, ethical leadership and committed citizenship”*

**Cost and benefits:**

<Refer spreadsheet >

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| **Project Scope** |

**The following functions identified below are in scope based on customer requirements for this implementation.**

**Responses Setup in User Defaults Configuration -** Managers can specify user-defined responses to appear on Caller toolbar

**SmartCall Caller Icons –**The icons on the SmartCall Caller toolbar are replaced with more user-friendly images.

**User-defined Response Buttons -** SmartCall Managers may now designate specific user-defined call responses to appear on the Caller toolbar.

**Mobile Phone Support**

* The new mobile phone fields will be available for segmentation, listing building, demographic changes, reporting, Callbacks, etc.
* SmartCall will allow the manager to control which of the Home, Business, Mobile, or Preferred numbers should be dialed automatically by User Default.
* The Monet application now includes mobile phone number fields and allows you to build caller prospect screens with mobile phone fields. This applies to new and existing caller prospect screens.

**Operators Administration Filter**

* A new filter on the Operators Administration window in SmartCall Reporting Manager allows you to filter the list and display more meaningful and pertinent information. By enabling the filter you can limit the list of visible operators to SmartCall Operators (Active, Inactive, and All), Non-SmartCall Operators, and All Operators.

**Email Acknowledgement Builder Refinement**

* New Blind Carbon Copy (BCC) prompt added to Email Acknowledgement Builder allows you to specify an email address to receive a copy of the acknowledgements sent to prospects via Caller or Manager **AdvExport Compatibility**
* AdvExport was enhanced to allow you to use SmartCall 9.8.0 with Ellucian Advance™ versions 9.8.1, 9.8.2.1 and 9.9.0.

**List Builder**

* The List Builder window can now be re-sized. This refinement aims to allow managers to easily view, create, and modify list rules

**Shifts Editor Refinements: (Long Term)\***

* In order to allow managers to more efficiently manage calling shifts, SmartCall 9.8.0 allows managers to modify the name and start time of a call shift created with SmartCall 9.8.0 through the Shifts Editor window.

(*\*Will not be tested in the current scope)*

**Defect Fixes:**

* Refer to the supplemental problem resolutions file (SmartCall\_ 9\_8\_0\_Resolutions.txt).
* Gather current defect list in the current release if any from Brian Diss (Appendix A)

**Items out of Scope:**

* Support for Cybersource® Secure Acceptance
* Recurring Credit Card Payments
* Prospect Information sent to CyberSource Secure Acceptance
* Any reporting changes that are a result of the upgrade are not in scope of this project and will need to identified as separate project.

**Assumptions:**

* AdvExport and SmartCall/Advance Integration will extract/refresh mobile, employer mobile, spouse mobile, and preferred phone type in SmartCall
* SmartCall Integration Utility (SIU) supports the transfer of demographic changes made to mobile phone, employer mobile phone, spouse mobile phone, and preferred phone type back into Advance
* It is assumed that all licenses will be secured for the Smartcall application, QAS – Quick Address Pro software, and Pay Pal credit card verification account is established.
* It is assumed that key personnel have identified any new features that are to be implemented, which have not been implemented in previous versions of the application.
* It is assumed that the application upgrade will not affect performance of the Smartcall Application.

## **Roles and Responsibilities**

| **Deliverable** | **Due Date** | **Responsibility** | **Actual Delivery Date** | **Sign Off** |
| --- | --- | --- | --- | --- |
| Technical project management |  | Navin Ikramullah |  |  |
| Project Tech lead /Consultant |  | Aaron Welsher |  |  |
| Developers |  | Jahnavi Vemuri/Kedar Bondili |  |  |
| Upgrade Oracle Instance SMRT test database |  | Lisa Yates |  |  |
| Upgrade Oracle Instance PSMC production database |  | Lisa Yates |  |  |
| Test the application in SMRT test database |  | Brian Diss/Christian Warneke |  |  |
| Test GADS feeds and Advance application |  | Diana Wilkins |  |  |
| Final Unit Review Test Smartcall 9.8 PSMC production database |  | Brian Diss/Christian Warneke |  |  |
| Information Security |  | McLaughlin Bryan |  |  |
| User Acceptance For University Relations |  | Kelly Ptacek |  |  |
| Final Acceptance Testing DoIT |  | Liz Dross |  |  |

**Major Project Deliverables (hardware, software, communications, training, transition)**

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| Technical Infrastructure |
| Test Server Installation |
| * Database Upgrade/Installation/Testing |
| Workstation Installation |
| * Client Software Installation/Testing |
| Production Environment |
| * Database Upgrade/Installation/ Testing |
| Project Management |
| * Initial Planning Meeting |
| * Project Kick Off Preparation |
| * Project Status -Meetings |
| Feature Review |
| * Review Release Notes for New Features |
| * Determine Features to be Included in Upgrade |
| Modifications to Existing Processes |
| * Data Import/Adv\_export |
| * Determine Modifications Needed (if any)/Testing |
| Prospect Screens |
| * Determine Modifications Needed (if any)/ Development & Testing |
| Application Configuration/SmartCall Manager |
| * Determine Modifications Needed (if any)/ Development & Testing |
| Out-put like Acknowledgement Letter/Email |
| * Determine Modifications Needed (if any)/ Development & Testing |
| SmartCall/Advance Integration |
| * Determine Modifications Needed (if any)/ Development & Testing |
| Testing |
| * Test Plan Development |
| * Testing |
| * Sign Off |
| Training |
| User Training |
| Application - Go Live |
| Call Center Live |

**Risks:**

**Schedule constraints:**

* Solution must be in place and operational by January 2015.
* Oracle 11.2.0.4.0 upgrade if needed
* The timeframe window is too tight for adequate testing and implementation. We could run out of time before phonathon starts in January 2015 causing a delay in implementing the upgrade which could potentially affect additional revenue as the new features will not be available.

**Budgetary Constraints:**

* Resource availability for Oracle 11.2.0.4.0 upgrade

**Other Constraints:**

* Monet Screen development
* We have several new features in this upgrade that are new to Creighton, and have potential to introduce challenges and could cause delays.
* Integration of QAS – Quick Address Pro and Pay Pal Credit Card verification)
* Phonathon callers not adequately trained on the new features, causing an effect on potential revenue.
* Personnel not available for installing of software hardware which could cause delays.

Risk Mitigation Strategy

| **Risk Description** | **Probability**  **(H=High, M=Medium, L=Low)** | **Mitigation Strategy** | Actual |
| --- | --- | --- | --- |
| If there are not enough resources designated for adequate testing of the application. | L | Assign people from each designated key area, to help with application testing. |  |
| If problems are identified in the upgrade process. | M | Contact Ellucian support for help in resolving issues, escalate if necessary |  |
| Monet Screen Development | M | Train additional resources which may impact timeline and budget |  |
| New features to not work as described | M | Check system option settings, contact ELLUCIAN support for help in resolving issues, or do not implement new feature if it is a possible option. |  |
| Check if there is enough room on the servers Unix Servers, for the larger footprint of this application upgrade. | L | If no, then Secure additional disk storage space. |  |
| New features | M | Check system option settings, contact ELLUCIAN support for help in resolving issues. Verify with other teams like (Information Security Officer) if needed. |  |
| Pay Pal Credit Card Verification | M | Check with paypal to see if there is a test CC number that can be used for testing before prod implementation |  |
| Phonathon Director leaving | H | Learning curve of Phonathon Co-ordinator and the new Phonathon Director might impact the timeline of the project |  |

**Dependencies:**

* The project is dependent on the availability of resources to make screen changes using Monet.
* Defining the phonathon data request is dependent on the upgrade.

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| **Project Resources** |

**High Level Org chart/Communication Plan:**

Kelly Ptacek

* + - * Brian Diss
        + Christian Warneke

Liz Dross

* + - * + Aaron Welsher
        + Jahnavi Vemuri
        + Kedar Bondili
        + Navin Ikramullah

**Other key Resource Requirements**

**<Refer spreadsheet>**

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| **Approvals** | | |
| Primary Division | Name of Approver | Date |
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| Key Stake Holders |  |  |
| Kelly Ptacek |  |  |
| Brain Diss |  |  |
| Liz Dross |  |  |
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| Additional Signatures | Name of Approver | Date |
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| **Supporting Elements** |

* High level WBS/Milestones/Deliverables
* Data Model
* As-Is Diagram

**Appendix A:**

Current defect list in the current release (if known) from Brian-Diss