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# **Roles and Responsibilities**

UMASS Enterprise Projects



# University of Massachusetts

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## **Project Management Roles**

### **Owner**

#### **Role Definition**

This role provides funding, senior level support, and overall direction for the effort.

#### **Responsibilities**

- Champions the project to the University
- Final approval for funding for the project
- Sets strategic direction and prioritization of project scope
- Responsible for the timely resolution of escalated issues
- Serves on committees as needed

#### **Skills**

- Executive level management and communication skills
- Thorough knowledge of the University organization and the ability to apply the knowledge to the University's objectives

### **University A&F Council or Student Admin Council Member**

#### **Role Definition**

The A&F Council / Student Admin Council will serve as the overall resource management cabinet.

#### **Responsibilities**

- Participates in the determination of success criteria
- Responsible for the timely resolution of escalated issues
- Monitors project costs at the executive level
- Monitors project progress against milestones and timeline
- Communicates with the Executive Committees on issues regarding executive intervention and issue escalation
- Responsible for review and endorsement of all budget submission and resource planning approaches prior to recommendation to the President's Council
- Endorses strategic direction and prioritization of project scope recommended by campus sponsors
- Serves on committees as needed

#### **Skills**

- Executive level management and communication skills



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- Thorough knowledge of the University organization and the ability to apply the knowledge to the University's objectives

## **University Project Executive**

### **Role Definition**

This role provides senior level support and overall direction for the enterprise-wide effort, plays an advisory role in setting priorities, scope and direction of the project. Empower team leaders and members with the authority to make decisions and carry out their responsibilities and holds them accountable for the results.

### **Responsibilities**

- Participates in the determination of success criteria
- Responsible for the timely resolution of escalated issues
- Monitors project costs at the executive level
- Monitors project progress against milestones and timeline
- Communicates with the Executive Committees on issues regarding executive intervention and issue escalation
- Serves on committees as needed

### **Skills**

- Executive level management and communication skills
- Thorough knowledge of the University organization and the ability to apply the knowledge to the University's objectives

## **Campus Sponsor**

### **Role Definition**

This role has primary focus at the campus level providing senior level support and overall direction.

### **Responsibilities**

- Champions the project at the campus and Central Services level
- Defines strategic direction and prioritization of project scope and submits recommendations to the project sponsors
- Understands strategic direction of the University and ensures project direction and scope support strategic objectives
- Ensures adherence to campus policies
- Champions all related efforts at the campuses
- Provides project resources
- Responsible for the timely resolution of escalated issues
- Responsible for review and approval of final acceptance criteria
- Serves on committees as needed

### **Skills**



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- Executive level management and communication skills.
- Thorough knowledge of the University organization and the ability to apply the knowledge to the University's objectives

## **University Project Director**

### **Role Definition**

This role, working in conjunction with the Vendor Project Director, provides leadership and overall direction for the project ensuring adherence to the budget and project milestones, contributes to decisions on priorities, direction and the functional scope of the system (typically in consultation with the Applications Cabinet).

### **Responsibilities**

- Manages the project budget and provides budget/actual status to the University Executive Management
- Reviews and approves project planning standards and guidelines to be used by functional and technical resources/teams ensuring a consistent approach
- Reviews and approves internal and external resource requirements
- Reviews and approves the project organizational structure including individual roles, team roles and the relationships among the project staff
- Reviews and approves security matrix with the Risk Management Office for final approval
- Reviews and approves status reporting requirements (format, frequency, etc.) and keeps project staff informed of goals, expectations and success criteria
- Reviews and approves scope changes adhering to Change Control guidelines
- Ensures adherence to the Change Control process used to inform, document and elevate changes to project scope
- Directs the Conflict/Issue resolution process in coordination with the Application Steward, where appropriate, and works to expedite issue resolution at the Integration Management and Sponsorship levels ensuring a minimum loss of time due to conflicts
- Reviews and approves methods of communication to inform the University community of the project objectives, goals, benefits and status (meetings, newsletters, web, etc.)
- Reviews and approves project planning standards and guidelines to be used by functional and technical resources/teams ensuring a consistent approach
- Reviews and approves training approach and strategy
- Reviews and approves testing approach and strategy
- Reviews and approves final acceptance criteria
- Serves on committees as needed

### **Skills**

- Experience managing complex projects
- Significant experience with information systems deployment and support and the ability to apply the knowledge to the University's objectives
- Strong leadership skills
- Strong project management skills
- Demonstrated issue and conflict resolution skills
- Excellent communication and negotiating skills
- Thorough knowledge of the University organization



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## **PeopleSoft Skills**

- Application Fundamentals
- Application Overview

## **University Application Steward**

### **Role Definition**

This role provides functional leadership for the project at the Campus level. The steward is empowered to make decisions on priorities, direction and the functional scope of the system (typically in consultation with the Applications Cabinet). Serves the Governance role for the application as the leader of the University Applications Cabinet. Ensures fair and appropriate direction on the definition of the business processes with respect to the University.

### **Responsibilities**

- Champions the project to the University
- Represents the business process owner leadership for the University with respect to the scope of the project
- Reviews and approves scope changes adhering to Change Control guidelines
- Key participant in the business process design phase to ensure University-wide business processes and leading practices are adopted whenever possible
- Coordinates multi-campus requirements
- Coordinates the decision making process for the Module Stewards
- Directs the Conflict/Issue resolution process in coordination with the Project Director, where appropriate, and works to expedite issue resolution at the Integration Management and Sponsorship levels ensuring a minimum loss of time due to conflicts
- Serves a guidance and advisory role with respect to multi-campus resource planning
- Directs the Identification and definition of the functional organizational structure for the project
- Participates in project planning activities
- Reviews user documentation requirements
- Reviews the training program
- Reviews definition of testing requirements
- Reviews definition of system security requirements
- Reviews implementation and rollout planning
- Serves on committees as needed

### **Skills**

- Thorough knowledge of University policies, business processes and procedures and the ability to apply the knowledge to the University's objectives
- Excellent management skills
- Excellent leadership skills
- Ability to keep a large team focused on the objectives
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills - ability to keep a wide audience informed of goals, expectations, progress and issues.



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## **PeopleSoft Skills**

- Application Fundamentals
- Application Overview

## **Application Manager**

### **Role Definition**

This role provides operational leadership and expertise.

### **Responsibilities**

- Responsible for the management of the day to day operations and related Service Level Agreements (SLA's)
- Ensures adherence to the Change Control process used to inform, document and elevate changes to project scope
- Plans and directs the internal and external application resources for daily operations
- Works with the UITS Project Director and University Application Steward to approve the application security matrix
- Leads in the identification and definition of the project organizational structure
- Reviews and approves training plans
- Reviews the development of test plans and test scenarios including application/unit test, integration/interface test, parallel test, performance/stress test, go-live, and readiness
- Reviews detailed design documents, technical specifications, and business process redesign documents
- Serves on committees as needed

### **Skills**

- Experience in Information Systems deployment and support and the ability to apply the knowledge to the University's objectives
- Solid technical expertise
- Solid understanding of business processes
- Excellent leadership and management skills
- Ability to keep a large team focused on the objectives
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills - ability to keep a wide audience informed of goals, expectations, progress and issues
- Solid knowledge of large scale system implementations

### **PeopleSoft Skills**

- Thorough knowledge of the application and its integration with other University systems and the ability to apply the knowledge to the University's objectives
- Thorough knowledge of the data and its uses throughout the University system
- Application Business Process & Design



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## **Functional Team Coordinator**

### **Role Definition**

This role provides leadership for the Functional teams. Empowered to make decisions and/or recommendations on priorities, direction and the staffing of teams as well as providing guidance in developing standards and recommending toolsets. Additionally, this role is responsible for ensuring compliance with University policy, regulatory oversight, and accepted business practice standards.

### **Responsibilities**

- Ensures adherence to the Change Control process used to inform, document and elevate changes to project scope
- Ensures adherence to the all process used for project management and control.
- Plans and directs the internal and external application resources for the project. Coordinates multi-campus business requirements
- Participates in project planning activities
- Ensures proper integration of the application throughout the University system
- Reviews and approves scope changes adhering to Change Control guidelines
- Reviews and approves training plans
- Reviews and approves the development of test plans and test scenarios including application/unit test, integration/interface test, parallel test, performance/stress test, go-live, and readiness
- Prepares status reports documenting progress against plan
- Directs the teams to prepare system for implementation/rollout
- Directs the definition and development of a system security matrix
- Serves on committees as needed

### **Skills**

- Experience in Information Systems deployment and support and the ability to apply the knowledge to the University's objectives
- Solid technical expertise
- Solid understanding of business processes
- Excellent leadership and management skills
- Ability to keep a large team focused on the objectives
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills - ability to keep a wide audience informed of goals, expectations, progress and issues
- Solid knowledge of large scale system implementations

### **PeopleSoft Skills**

- Thorough knowledge of the application and its integration with other University systems and the ability to apply the knowledge to the University's objectives
- Thorough knowledge of the data and its uses throughout the University system
- Application Business Process & Design



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## **Senior Project Manager**

### **Role Definition**

This role manages, facilitates, and sets overall Project Management direction for the project, ensuring adherence to established methodologies and budget and project milestones.

### **Responsibilities**

- Reviews and approves project planning standards and guidelines to be used by functional and technical resources/teams ensuring a consistent approach
- Directs the high level project plan encompassing the enterprise-wide project
- Ensures Leads capture and track hours and dollars to plan within the defined timeframe
- Approves all updates to the project plan
- Manages the established project budget and provides budget/actual status to the project sponsors
- Defines the project organizational structure and the individual roles, team roles and the relationships among the project staff
- Directs the Change Control process to be used to inform, document and elevate changes to project scope
- Coordinates/leads project planning activities
- Responsible for the development and maintenance of the Project Plan
- Participates in the development of the project organizational structure
- Manages scope change adhering to Change Control guidelines
- Manages project documentation and communication
- Manages the development and execution of test plans and test scenarios including application/unit test, integration/interface test, parallel test, and performance/stress test.
- Works with Auditors to ensure project standard adherence
- Reviews and coordinates status reporting requirements (format, frequency, etc.)
- Prepares status reports documenting progress against plan
- Responsible for go-live planning and execution of readiness plan
- Prepares system for implementation/rollout including the verification of successful completion of all audit requirements
- Responsible for working within the budget and resource plans
- Serves on committees as needed

### **Skills**

- Excellent project management and tools skills and the ability to apply the knowledge to the University's objectives
- Experience in Information Systems deployment and support
- Solid understanding of technical processes and relevant business processes
- Excellent management skills
- Excellent leadership skills
- Ability to keep a large team focused on the objectives
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills - ability to keep a wide audience informed of goals, expectations, progress and issues

### **PeopleSoft Skills**



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- Application Fundamentals
- Application Business Process & Design
- Reporting and analysis tools
- PeopleSoft upgrade experience

## **Project Management Office Coordinator**

### **Role Definition**

This role serves as senior support to the project managers of the project.

### **Responsibilities**

- Acts in the capacity of an expert resource to the project managers
- Leads the development of project standards for all aspects of the project
- Ensures that Project Management techniques and standards are adhered to across the project including project plans, issue tracking, reporting.
- Ensures proper integration of team work plans for effective consolidated project reporting
- Augments all project activity, i.e. reporting of project status, resource usage, earned value tracking and reporting, in conjunction with the Team Leads
- Serves on committees as needed

### **Skills**

- Solid understanding of project management tools and techniques and the ability to apply the knowledge to the University's objectives
- Solid understanding of standards development
- Excellent project management skills
- Excellent management and leadership skills
- Excellent communication skills
- Excellent organizational skills
- Ability to handle multiple tasks simultaneously
- Ability to prioritize tasks

## **Technology Executive**

### **Role Definition**

This role provides overall technical direction for the project, approves hardware, software and networking strategies. Empowered to make decisions and/or recommendations on priorities, direction and the technical design of the environment.

### **Responsibilities**

- Manages the technical resources and develops the technical organizational structure
- Approves internal and external resource requirements including human, hardware, and software needs
- Reviews and approves the technical project plan for the project



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- Approves and submits to the project management team the technical architecture for the University administrative systems in support of the project ensuring infrastructure-related performance metrics are met for the project
- Approves and submits to the project management team the design of the technical architecture to meet future demand (scalability)
- In coordination with the Technical Manager, approves and submits standards and standard procedures for technical areas such as security administration, technical documentation, system and database administration to the project management team
- Approves the strategy for multi-campus remote access and campus based systems compatibility
- Serves on committees as needed

## **Skills**

- Thorough knowledge of the University's technical infrastructure and policies
- Solid knowledge of trends in technology and the ability to apply the knowledge to the University's objectives
- Strong management and leadership skills
- Excellent negotiating and communication skills
- Solid experience in large scale systems implementations

## **PeopleSoft Skills**

- Strong knowledge of the application architecture requirements for optimal performance and growth

## **Technology Manager**

### **Role Definition**

This role provides overall technical leadership for the project, recommending hardware, software and networking strategies.

### **Responsibilities**

- In coordination with the project management team, develops the technical project plan for the project and submits to the Technical Executive for approval
- Defines and submits for approval internal and external resource requirements
- Recommends the technical architecture for university administrative systems ensuring infrastructure-related performance metrics are met for the project
- Leads the design of the technical infrastructure to meet future demand (scalability)
- Establishes standards and standard procedures for technical areas such as security administration, technical documentation, system and database administration and submits for approval to the Technology Executive
- Coordinates technical efforts with designated campus technical resources
- Coordinates multi-campus requirements to develop a strategy for remote access and campus based systems compatibility
- Serves on committees as needed

## **Skills**



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- Thorough knowledge of the University's technical infrastructure and policies
- Solid knowledge of trends in technology and the ability to apply the knowledge to the University's objectives
- Strong management and leadership skills
- Excellent negotiating and communication skills
- Solid experience in large scale systems implementations

## **PeopleSoft Skills**

- Strong knowledge of Development Tools
- Strong knowledge of Administration Tools
- Strong knowledge of the application architecture requirements for optimal performance and growth

## **Development and Reporting Executive**

### **Role Definition**

This role provides leadership for the development and reporting efforts of the project. Empowered to make decisions and/or recommendations on priorities, direction and tool sets used.

### **Responsibilities**

- Approves standards and standard procedures for technical areas such as software customization and development, application maintenance and administration
- Collaborates in the strategic direction for Business Intelligence/reporting effort
- Directs the Business Intelligence/reporting effort
- Works in coordination with the University Reporting Steward to set strategic direction of the reporting solution for the project
- Directs all development efforts, including customizations, conversion, and development of independent software efforts
- Serves on committees as needed

### **Skills**

- Thorough knowledge of the University's technical infrastructure and policies
- Solid knowledge of trends in technology and the ability to apply the knowledge to the University's objectives
- Strong management and leadership skills
- Excellent negotiating and communication skills
- Solid experience in large scale systems implementations
- Expert knowledge in strategy and delivery of Business Intelligence and Reporting solutions

### **PeopleSoft Skills**

- Knowledge of Development Tools
- Knowledge of Administration Tools



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## ***Development, Conversion & Security Manager***

This role provides leadership for the Development, Conversion and Security teams. Empowered to make decisions and/or recommendations on priorities, direction and the staffing of teams as well as providing guidance in developing standards and recommending toolsets. Additionally, this role is responsible for ensuring compliance with University policy, regulatory oversight, and accepted business practice standards.

- Provides oversight for the Development, Conversion and Security teams
- Reviews project milestones and the implementation schedule
- Reviews and approves internal and external resource requirements for the Development, Conversion and Security
- Keeps project staff informed of goals, expectations, and success criteria
- Reviews and approves security matrices to ensure compliance with policies and regulations
- Reviews and approves configuration of all other security to ensure compliance with policies and regulations
- Reviews and approves security policies to ensure compliance with all regulations and accepted business practices
- Reviews and approves development standards
- Provides expertise and leadership to the teams regarding data mapping specifications (tools, formats, default values, fillers, etc.)
- Manages the data cleansing process
- Ensures each campus' unique conversion requirements are met
- Serves on committees as needed

### ***Skills***

- Strong Leadership skills
- Knowledge of current established and emerging authentication technologies and the ability to apply the knowledge to the University's objectives
- Experience managing data conversion, interface programming, and enhancement development efforts
- Good understanding of university business processes
- Excellent written and verbal communication skills
- Project management and tools experience
- Ability to prioritize tasks

## ***Change Management Manager***

### ***Role Definition***

This role provides leadership for the Change Management and Training teams. Empowered to make decisions and/or recommendations on priorities, direction and the staffing of teams as well as providing guidance in developing and implementing communications, training, and campus liaison efforts.

### ***Responsibilities***

- Provides oversight for the Change Management Teams; Site Readiness Team, Communications Team, Campus Liaisons and Training Team



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- Develops Training and Change Management Plans that will identify the strategy and the tasks required to successfully complete the project
- Reviews project milestones and the implementation schedule
- Reviews and approves internal and external resource requirements for the Change Management team
- Keeps project staff informed of goals, expectations and success criteria
- Manages the Change Control process within the Change Management and Training Teams to inform, document and elevate changes to project scope
- Reviews and approves methods of communication to inform the University community of the project objectives, goals, benefits and status to ensure a consistent message and delivery
- Reviews and approves training approach and strategy
- Serves on committees as needed

## ***Skills***

- Strong leadership and management skills
- Ability to lead and coordinate cross-functional, multi-campus efforts in managing the changes resulting from the project and the ability to apply the knowledge to the University's objectives
- Excellent communication skills
- Thorough understanding of the University organization
- Strong project management skills

## ***Budget Specialist***

### ***Role Definition***

This role provides support and control processes for project budgeting.

### ***Responsibilities***

- Prepares the project cost estimate procedure
- Gathers cost estimates for specific line items as input into the development plan and budget using the best estimate allowed from the existing information
- Responsible for cost estimates accuracy
- Reviews contractors' cost estimates
- Prepares project Cost Breakdown Structure
- Responsible for Cost Breakdown Structure accuracy
- Supplies the necessary information to maintain updated cost estimates
- Works closely with the Controller's Office for effective and appropriate accounting management
- Establishes processes to maintain the tracking of all invoices and purchase orders for the project
- Monitors and reconciles budget activity
- Provides budget related updates to project management
- Serves on committees as needed

### ***Skills***

- Thorough understanding of Federal, State, University, and Legal standards and regulations regarding the execution and maintenance of general accounting practices



## **Contract Analyst**

### **Role Definition**

This role provides support and control processes for contracts.

### **Responsibilities**

- Works closely with the Controller's Office for effective and appropriate accounting management
- Maintains all project related contracts
- Provides contract related updates to the Project Director (i.e. renewal dates, discrepancies in vendor invoices vs. contract terms)
- Serves on committees as needed

### **Skills**

- Solid understanding of contract terms and maintenance and the ability to apply the knowledge to the University's objectives
- Thorough understanding of Federal, State, University, and Legal standards and regulations regarding the execution and maintenance of public contracts and accounting practices

## **Project Administration Specialist**

### **Role Definition**

This role provides overall administrative support to the Project Management Office for the duration of the project.

### **Responsibilities**

- Assists Project Management Office in maintaining project documentation, Project Plans, Organization Charts, Team Databases, etc.
- Schedules meetings for the project
- Ensures the availability of facilities and services for project meetings
- Act as scribe as needed
- Serves on committees as needed

### **Skills**

- Ability to handle multiple tasks simultaneously
- Ability to prioritize tasks
- Excellent organizational skills
- Good communication skills
- Competence with administrative tools including Microsoft Office Suite of tools



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## **University Auditor**

### **Role Definition**

This role ensures compliance with both internal and external audit requirements based on established and published standards for all phases of the project within defined timelines. Reports audit findings to project management.

### **Responsibilities**

- Provides direction and guidance to project on audit and control requirements
- Review and validate operational standards
- Review and advise on data stewardship
- Review and advise on conversion strategy and outcomes
  
- Review and advise on training strategy
- Review and advise on documentation strategy
- Review and advise on testing strategy
- Review and advise on security administration
- Review and advise on cutover/rollout strategy
  
- Perform a post implementation review and report results
- Coordinates the audit process with the Senior Project Manager
- Serves on committees as needed

### **Skills**

- Excellent auditing skills and the ability to apply the knowledge to the University's objectives
- Solid understanding of project life cycle methodology.
- Solid understanding of administrative systems' processes.

### **PeopleSoft Skills**

- Good understanding of PeopleSoft system features and conventions.

## **University Security Policy Resource**

### **Role Definition**

This role ensures compliance with both internal and external security requirements based on established and published policies as well as establishing new policies in cooperation with the Risk Management Office.

### **Responsibilities**

- Review and validate operational standards with respect to data security, access services practices and procedures pertaining to the project
- Review and advise on data confidentiality and access policies
- Review and advise on security administration pertaining to the project in the production environment



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- Works with the Technology Lead and the Security Administrators, as needed, to modify existing policies and develop new policies based on requirements generated by the project
- Works with the Communications Specialist and Security Lead to disseminate security policy information to project team members and University staff
- Serves on committees as needed

## **Skills**

- Solid understanding of the University's Security Policies, Risks, Data Security Management, Data Access Policy and Procedures and the ability to apply the knowledge to the University's objectives
- Solid understanding of administrative systems' processes
- Good communication skills

## **Campus Project Manager**

### **Role Definition**

This role provides overall coordination for the project at the campus level, ensuring adherence to the campus budget and project milestones. Serves as a Liaison between central activities and campus based activities.

### **Responsibilities**

- Leads the planning of the campus resource allocation
- As the primary campus contact this manager works with the Senior Project Manager to allocate and direct campus functional resources -acts as a focal point for campus teams and campus management for the project
- Manages the campus budget and provides budget/actual status to management
- Coordinates the campus requirements with the various teams to ensure the successful delivery of the final product
- Works to expedite issue resolution ensuring a minimum loss of time due to conflicts in collaboration with other CPM's
- Coordinates project change management efforts with the Campus Change Management teams to ensure clear communication of project information and a smooth transition during implementation
- Serves on committees as needed

### **Skills**

- Excellent management skills
- Excellent leadership skills
- Issue resolutions skills
- Excellent communication and coordination skills
- Excellent project management skills

### **PeopleSoft Skills**

- Good understanding of PeopleSoft system features and conventions.



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## **Cross Project Coordinator**

### **Role Definition**

This role is responsible for the identification and monitoring of other projects at the University that will have impacts on the project and to communicate that information to the Project Management Team. Actively monitor other projects at the University to identify and communicate schedule changes, architecture changes, data changes, etc. that may negatively impact the project.

### **Responsibilities**

- Establish a project management network to facilitate the identification of project impacts (touch points) including schedule changes, architecture changes, security changes, data changes, and any other changes that may compromise the project's ability to deliver a quality product according to schedule from all University and Campus projects
- Create and maintain a list of project touch points to be used to monitor inter-project dependencies and impacts including schedule changes, architecture changes, security changes, data changes, and any other changes that may compromise the project's ability to deliver a quality product according to schedule
- Facilitate regular meetings with the project management network to monitor project touch points including schedule changes, architecture changes, security changes, data changes, and any other changes that may compromise the project's ability to deliver a quality product according to schedule
- Attend meetings of other project teams to identify new touch points or changes that impact existing touch points for the project including schedule changes, architecture changes, security changes, data changes, and any other changes that may compromise the project's ability to deliver a quality product according to schedule
- Work with the Integration/Interface Coordinator to monitor and manage interface impacts across other projects and other systems
- Communicate to the Project Management Team any impacts from other projects including schedule changes, architecture changes, security changes, data changes, and any other changes that may compromise the project's ability to deliver a quality product according to schedule

### **Skills**

- Excellent communication and coordination skills
- Thorough knowledge of the data model
- Solid understanding of the University's business processes
- Good project management skills and knowledge of project management tools
- Some knowledge of Security Administration Tools
- Some knowledge of Batch Schedule Tool
- Some knowledge of Room Management System features and conventions
- Some knowledge of R25 Resource Management System features and conventions

### **PeopleSoft Skills**

- Solid understanding of PeopleSoft system features, conventions, and processes
- Some knowledge of the PeopleSoft architecture



## Functional Roles

### **Integration/Interface Coordinator**

#### **Role Definition**

Coordinates the design, development, testing, and implementation of interfaces and integration points between the PeopleSoft ERP systems (HCM, Student Administration and Financials) as well as internal University systems and external vendor systems. Provides overall coordination for integration and interface implementation ensuring adherence to the project milestones.

#### **Responsibilities**

- Works with the Module Leads to allocate and coordinate functional resources in support of the design, development, testing, and implementation of interfaces and integration points
- Works with the Conversion/Development Lead to allocate and coordinate technical resources in support of the design, development, testing, and implementation of interfaces and integration points
- Ensures quality control during all phases of interface and integration point development
- Establishes standards for the development and implementation of interfaces and integration points
- Serves on committees as needed

#### **Skills**

- Knowledge of all aspects of the System Development Life Cycle and the ability to apply the knowledge to the University's objectives
- Experience with EDI and real-time/batch interface development
- Data warehousing experience in support of complex operational systems
- Excellent written and verbal communication skills
- Project management and tools experience
- Ability to prioritize tasks

#### **PeopleSoft Skills**

- Application Fundamentals
- Reporting & Analysis Tools
- Administration Tools
- Development Tools

### **Operational Reporting Lead**

#### **Role Definition**



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This role coordinates the execution of the design, development, testing, implementation and distribution of reports, as well as the development of data models and Datamarts.

## **Responsibilities**

- Works with the Module Leads to allocate and direct functional resources in support of the designated component for the project
- Works with the Technical Lead and Development Lead to allocate and direct technical resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the project
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Provides consultation and coordination with other teams to ensure data is structured in a way that is secure and facilitates reporting
- Coordinates data quality/cleansing efforts for the reporting solution
- Participates in the development of testing plans and scenarios ensuring that all aspects of the reporting solution are fully tested: conversion test, application/unit test, performance/stress test
- Leads effort to perform tests and validate system reliability and readiness for the reporting solution
- Performs tests and reviews test results for the reporting solution
- Participates in the development and documentation of specific security requirements for reporting solution users
- Serves on committees as needed

## **Skills**

- Knowledge of all aspects of the System Development Life Cycle
- Data warehousing and Enterprise Reporting experience in support of complex operational systems and the ability to apply the knowledge to the University's objectives
- Excellent written and verbal communication skills
- Project management and tools experience
- Ability to prioritize tasks

## **PeopleSoft Skills**

- Thorough knowledge of the data model
- Business intelligence, reporting and analysis Tools
- Administration Tools
- Development Tools



## **Quality Assurance Coordinator**

### **Role Definition**

Oversees the planning and execution of Quality Assurance activities for all project deliverables. Responsible for ensuring that tests on project deliverables are planned, developed, executed and reported on in a thorough and timely manner, with all product deficiencies diagnosed, verified, and resolved.

### **Responsibilities**

- Works with design teams during design phases to decide how much/what testing of the solution will be required across all modules and systems
- If the project is to add features to an existing product, participates in the design of the tests of that new feature PLUS the regression tests necessary to ensure the new feature did not break existing features
- Participate in design reviews of the system as it is developed, to bring knowledge from past testing—what kinds of problems have slipped through design reviews in the past, etc.
- Coordinates the execution of all test phases
- Plan and oversee the execution of test cases to ensure that all integrated testing scenarios are tested in the appropriate time frame and that each stage of testing for a scenario is completed prior to the progression to the next stage
- Ensure that the process for recording issues, test case pass-fail statistics, and reporting of teams is followed by the teams
- Ensure that the process for completing fixes is followed so that fixes are thoroughly tested before an issue is considered “resolved”
- Ensure the adequacy of regression testing to reduce uncertainty about product quality
- Works with the project teams to define, implement and enforce release success/acceptance criteria
- Works with the project teams to develop a defect tracking process
- Regularly monitors the defect repair process and the regression testing to ensure the repair did not break other features
- Captures data about the overall effectiveness of the defect repair process so that a final review can be done to develop better testing methods at the end of the project
- Provide feedback on user and support documentation to ensure that the documentation is up to date and in a format that adheres to the defined standards for use throughout the project teams and user communities
- Meets regularly with teams to ensure they are adhering to defined standards and processes for the project
- Ensures Business Process Documents are updated and complete for the most recent release of the application
- Serves on committees as needed

### **Skills**

- Excellent written and verbal communication skills
- Expert knowledge in testing methodologies and the ability to apply this knowledge to the University's objectives
- Familiarity with established and emerging industry quality standards
- Ability to work across cross-functional teams
- Ability to prioritize tasks
- Knowledge of Issue Tracking software



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## **PeopleSoft Skills**

- Thorough knowledge of the data model
- Business intelligence, reporting and analysis Tools
- Administration Tools
- Thorough functional knowledge of the application
- Some knowledge of the PeopleSoft system architecture

## **University Reporting Steward**

### **Role Definition**

This role provides functional leadership for Enterprise Reporting solutions. Ensures fair and appropriate direction and prioritization of the access to information across varied and multiple audiences.

### **Responsibilities**

- Baseline responsibilities are those described in the role definition of the Campus Reporting Specialist.

Additional responsibilities:

- The Reporting Steward has the responsibility to assist the Campus Reporting Specialists in finalizing an issue when consensus cannot be reached
- Collaborates in data governance to ensure that the reporting goals are met
- Works in coordination with the Development and Reporting Executive to set strategic direction of the reporting solution for the project
- Responsible for coordinating campus readiness in coordination with the Site Readiness resource in support of the reporting solution
- Escalates reporting and data issues which cannot be resolved to the next level in the governance model

### **Skills**

- Thorough knowledge of data, policies, business processes and procedures as relates to the reporting solution and the ability to apply the knowledge to the University's objectives
- Excellent organization skills
- Team leadership skills
- Ability to work effectively across university campuses and across levels within the organization
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills

### **PeopleSoft Skills**

- Application Fundamentals



## **Campus Reporting Specialist**

### **Role Definition**

This role defines and prioritizes campus reporting requirements.

### **Responsibilities**

- Representative for the reporting core team for the project
- Coordinates campus resources as needed (SMEs, Functional Resources, etc.)
- Collaborates with the Campus Functional Members and Stewards to adopt a stable data governance model
- Identifies requirements across the campus at varying levels to ensure the reporting solution meets the requirements. This includes, but is not limited to the following categories of reporting: Institutional Research, Department Managers, Executive Reporting, Academic Reporting, Affirmative Action, etc.
- Supports data quality / data cleansing efforts
- Participates in the development of the functional organization structure (trees, hierarchies)
- Participates in development of testing and training requirements
- Identifies and Documents scope changes adhering to Change Control guidelines
- Works with documentation guidelines to develop user documentation
- Participates in the development of testing plans and scenarios ensuring that all aspects of the reporting solution are fully tested: conversion test application/unit test, and performance/stress test
- Perform and coordinates tests and reviews test results for associated areas of expertise
- Participates in the development and documentation of specific security requirements for reporting users
- Participates in the development and documentation of an implementation/rollout plan
- Participates in preparation of status reports documenting progress against plan
- Serves on committees as needed

### **Skills**

- Excellent knowledge of the data model and its use at the campus level and the ability to apply the knowledge to the University's objectives
- Strong analytical skills
- Excellent communication and negotiation skills
- Issue resolution skills - ability to obtain resolution by team consensus

### **PeopleSoft Skills**

- Application Fundamentals

## **Security Lead**

### **Role Definition**

This role leads the Security Team by providing support of data and access security.

### **Responsibilities**



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- Works with the Applications Manager and the Technical Lead to allocate and direct resources in support of the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the development and implementation of the security model
- Manages the budget and provides budget/actual status within the defined timeframe for the designated component of the project plan to the project management team
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards in coordination with the Security Policy Resource for the designated component of the project plan
- Works with Module Stewards and Application Specialists to develop the security matrices for each application/module (i.e. the definition of security roles and permission lists) using existing standards and naming conventions
- Establishes database level access requirements and approval process in coordination with the Application Manager and Technical Manager
- Defines configuration of other security efforts; Report Distribution, directory structures, etc.
- Works with the Security Administrators, Technology Lead, Cross Function Coordinator, and the Security Policy Resource, as needed, to modify existing policies and develop new policies based on requirements generated by the project
  
- Serves on committees as needed

## ***Skills***

- Strong Leadership skills
- Knowledge of current established and emerging authentication technologies and the ability to apply the knowledge to the University's objectives
- Good understanding of university business processes
- Excellent written and verbal communication skills
- Project management and tools experience
- Ability to prioritize tasks

## ***PeopleSoft Skills***

- Thorough knowledge of the application and the ability to apply the knowledge to the University's objectives
- Thorough knowledge of Security Administration Tools

## ***Campus Data Custodian***

### ***Role Definition***



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This role works with the Security Team to map permissions to security roles and is responsible for mapping security roles to end-users at the campus.

## **Responsibilities**

- Works with end-users to assign the security roles needed to ensure each contributor has the appropriate level of security without creating conflicts with the University's established security policies
- Coordinate with the UITS Security Administrator and Campus Security Administrators to attach the appropriate roles to users
- Serves on committees as needed

## **Skills**

- Good understanding of University business processes and the ability to apply the knowledge to the University's objectives
- Excellent written and verbal communication skills

## **PeopleSoft Skills**

- Solid functional understanding of Security Administration

## **UITS Security Administrator**

### **Role Definition**

This role participates in the project to implement security/access by assisting with mapping permissions to security roles and security roles to end-users.

### **Responsibilities**

- Provides expertise in the area of End-User Security Administration
- Creates and updates user accounts in multiple instances and environments
- Creates and updates roles and permission lists for the University
- Support other security efforts; i.e. Report Distribution, directory structures
- Supports security software
- Works with the Technology Lead and the University Security Policy Resource, as needed, to modify existing policies and develop new policies based on requirements generated by the project
- Coordinate with the Campus Data Custodian and Campus Security Administrators to attach the appropriate roles to users
- Serves on committees as needed

### **Skills**

- Knowledge of current established and emerging authentication technologies and the ability to apply the knowledge to the University's objectives
- Good understanding of security/access processes

### **PeopleSoft Skills**



- Thorough knowledge of Security Administration Tools

## ***Campus Security Administrator***

### ***Role Definition***

This role provides direction and support to the Security Lead in the area of Operator Security.

### ***Responsibilities***

- Creates and updates Campus user accounts in multiple instances and environments
- Support and configuration of other Campus security efforts; Report Distribution, directory structures, etc.
- Coordinate with the UITs Security Administrator and Campus Data Custodians to attach the appropriate roles to users
- Serves on committees as needed

### ***Skills***

- Good understanding of university business processes and the ability to apply the knowledge to the University's objectives

### ***PeopleSoft Skills***

- Understanding of Security Administration Tools

## ***Subject Matter Expert (SME)***

### ***Role Definition***

This role supports the project with specific knowledge of one or more processes (business, transaction, or technical) to develop the configuration, data, and associated procedures needed to support an optimal implementation of the designated process.

### ***Responsibilities***

- Provides expertise on functional/technical processes including other applications and campus specific processes that may impact the project
- Collaborates with other project team members to develop common processes across the University
- Identify opportunities to streamline and reengineer business processes to best leverage the PeopleSoft system
- Works on design tasks as required
- Develops and/or executes test scenarios
- Serves on committees as needed

### ***Skills***



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- Excellent knowledge of designated business/transaction processes and the ability to apply the knowledge to the University's objectives
- Strong analytical skills

## **PeopleSoft Skills**

- Application Fundamentals
- Module Business Process & Design
- Proficient knowledge of designated process and its impacts to other modules or systems through integration points and interfaces.

## **Key Decision Maker**

### **Role Definition**

Empowered by the appropriate Council group to represent campus requirements and make decisions. Where business practices diverge across campuses, this role works to adopt University-wide practices where it is in the best interest of the University.

### **Responsibilities**

- Review and validate new and changed processes generated during the Design Phase including security and reporting
- Review alternative design solutions when necessary during the Design Phase including security and reporting
- Review and Approve Business Process Changes that may be produced during the Design Phase including security and reporting
- Escalates Business Process issues using the established Issue Escalation Procedure including security and reporting Responsible for the business process decision during the project
- Identifies and coordinates campus resources as needed (SMEs, Functional Resources, etc.)
- Review and approve scope changes adhering to Change Control guidelines
- Serves on committees as needed

### **Skills**

- Excellent knowledge of business/transaction processing at the Campus level and the ability to apply the knowledge to the University's objectives
- Strong analytical skills
- Excellent communication and negotiation skills
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed

## **Module Roles**

Each module (eg., General Ledger, Academic Advising, Time & Labor) will have a team, led by the Module Lead that is made up of a combination of campus and UITS resources as described below.



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## University Module Steward

### **Role Definition**

This role provides functional leadership for one or more modules within the PeopleSoft application. Serves the governance role for the module. Ensures fair and appropriate direction on the definition of the business processes with respect to the University.

### **Responsibilities**

- Responsible for the functional design and business process decision/recommendations during the project
- Working with the Campus Project Managers, identifies and coordinates campus resources as needed (SMEs, Functional Resources, etc.)
- Collaborates with other Module Stewards and SME's as needed to develop common processes across the university based on leading practices
- Identify opportunities to streamline business processes to best leverage the PeopleSoft system in coordination with other Module Stewards and SME's as needed
- Supports data quality / data cleansing efforts associated with data conversion and implements/ensures any needed manual data quality/cleansing
- Participates in the development of the functional organization structure (trees, hierarchies)
- Participates in development of the reporting requirements
- Participates in development of the conversion requirements
- Participates in development of integration/interface requirements
- Participates in development of testing and training requirements
- Works on other design tasks as needed
- Review scope changes adhering to Change Control guidelines
- Works with documentation team to develop user documentation
- Participates in the development of testing plans and scenarios ensuring that all aspects of the module are fully tested: conversion test, application/unit test, integration/interface test, parallel test, performance/stress test, acceptance test
- Perform tests and review test results
- Reviews documentation of specific security requirements for module users
- Reviews documentation of an implementation/rollout plan
- Provides status reports
- Executes test plans and scenarios and reviews results ensuring that all aspects of the module are fully tested: conversion test, application/unit test, integration/interface test, parallel test, performance/stress test, acceptance test
- The Module Steward has the responsibility to assist the Key Decision Makers in finalizing an issue when consensus cannot be reached
- Escalates business process issues which cannot be resolved to the next level in the governance model
- Works with the Module Team and Security Lead to develop the security matrices for each application/module (i.e. the definition of security roles and permission lists)
- Serves on committees as needed

### **Skills**

- Thorough knowledge of policies, business processes and procedures as relates to the module and the ability to apply the knowledge to the University's objectives
- Excellent organization skills
- Team leadership skills



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- Ability to work effectively across university campuses.
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills

## **PeopleSoft Skills**

- Application Fundamentals including assigned module dependencies
- Thorough knowledge of assigned module and business practices associated with it
- Functional understanding of Security Administration Tools

## **Module Lead**

### **Role Definition**

This role provides application expertise and leadership for one or more of the PeopleSoft modules ensuring adherence to the project milestones.

### **Responsibilities**

- Works with the Team Members to allocate and direct functional resources in support of the designated component for the project
- Works with the Technical Lead and Development Lead to allocate and direct technical resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the Project Management Team
- Responsible for the execution of the tasks within the component portion of the project plan
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the project
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Primary support for the PeopleSoft module implementation and post-implementation support
- Leads effort to develop functional requirements and facilitate business process design in support of the project
- Leads effort to develop module data conversion program specifications (old values/codes → new values/codes) for the designated module
- Coordinates data quality/cleansing efforts for the designated module
- Leads effort to develop the functional organizational structure (hierarchies, trees) for the designated module
- Leads effort to develop module interface program specifications: interfaces to/from other PeopleSoft modules, interfaces to/from internal and external applications and vendors
- Leads effort to develop module reporting specifications
- Works with Campus Functional Members to ensure end-to-end business processes across modules (HCM, Student, and FIN) are documented, tested, and the appropriate



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- knowledge transfer has been completed, and to ensure the Campus Functional Member understands the processes from a System and University perspective
- Documents scope changes adhering to Change Control guidelines
  - Works with documentation team to develop user documentation
  - Leads effort to develop testing plans and scenarios ensuring that all aspects of the module are fully tested: data conversion tests, application/unit tests, integration/interface tests, parallel tests, performance/stress tests, acceptance test
  - Leads effort to perform tests and validate system reliability and readiness
  - Serves on committees as needed

## **Skills**

- Project Management and tools experience
- Ability to prioritize tasks
- Solid understanding of technical processes and relevant business processes and the ability to apply the knowledge to the University's objectives
- Team leadership skills - ability to work effectively across university campuses
- Issue resolution skills - ability to obtain resolution by team consensus when differences in business processes are discussed
- Excellent communication skills

## **PeopleSoft Skills**

- Thorough knowledge of module and its interactions with other modules/applications
- Application Fundamentals
- Application Business Process & Design
- Reporting & Analysis Tools
- Administration tools
- Development tools

## **Application Specialist**

### **Role Definition**

This role provides module teams with PeopleSoft system functional expertise and other enterprise applications knowledge.

### **Responsibilities**

- Translates functional business requirements into design criteria for PeopleSoft including input into the development of the security matrices
- Provides solutions and recommendations to complex problems and issues allowing the teams to decide on the best approach
- Provides estimates (effort/time) to implement solutions in conjunction with the appropriate technical resources
- Works with the appropriate technical resources to develop detailed design specifications and documentation
- Analyzes and troubleshoots problems encountered within PeopleSoft using appropriate technical resources when needed
- Builds a prototype of the design using the appropriate tools to supply a mockup for technical resources when needed



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- Key participant in the construction phase; data load, unit test assistance, data validation, etc.
- Participant in testing; test data load, test scenarios, etc.
- Key participant in the deployment phase; cutover plan, conversion (open items), master data load, historical data load, etc.
- Translates functional integration/interface requirements into technical design documentation
- Translates functional reporting requirements into technical design documentation
- Serves on committees as needed

## **Skills**

- Strong functional skills in PeopleSoft applications and the ability to apply the knowledge to the University's objectives
- Experience in all phases of the project life cycle
- Excellent analytical skills
- Solid understanding of the university organization and infrastructure
- Excellent communication skills

## **PeopleSoft Skills**

- Thorough knowledge of the application and its integration with other University systems and the ability to apply the knowledge to the University's objectives
- Thorough knowledge of the data and its uses throughout the University system
- Module Business Process & Design
- Reporting & Analysis Tools
- Administration Tools (some knowledge)
- Development Tools (some knowledge)



## Change Management Roles

### Change Management Lead

#### Role Definition

This role assists in the development and implementation of a *Change Management* framework utilized during the transition to the new release. Collaborates with the Project Management Team, Campus Representatives and Campus Project Managers to develop and implement organizational readiness activities.

#### Responsibilities

- Works with the Module Leads and Team Members to allocate and direct functional resources in support of the designated component for the project
- Works with the Technical Lead and Development Lead to allocate and direct technical resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the project
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Leads the Change Management Teams in the execution of the *Change Management Plan*
- Develops programs designed to encourage employee involvement throughout the project
- Key participant on several Project Implementation teams assisting them with the site readiness, communication and implementation (cutover) plans
- Works closely with the Campus Change Management Leads to ensure a consistent approach to change management at all campuses/sites
- Receives, records, and assists in issue requests and resolution
- Helps to manage expectations
- Serves on committees as needed
- Communication:
  - Develops programs designed to communicate project information to the University community
  - Develops methods and forums to be used to inform the University community of the impending changes to site procedures
  - Ensures that project timelines are met for distributing communications
- Liaison Network:
  - Participates in the design and development of the liaison program
  - Establishes a network of people (liaisons) to manage and facilitate the communication (through workshops, newsletters, meetings, etc.)



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- Responsible for managing the campus based Liaison Network
- Site Readiness:
  - Works with Infrastructure Team on PC and software readiness

## **Skills**

- Strong leadership skills - ability to lead cross-functional, multi-campus efforts in managing the changes resulting from the project
- Excellent communication skills
- Thorough understanding of the University organization and the ability to apply the knowledge to the University's objectives
- Knowledge of issue tracking software
- Knowledge of the PeopleSoft system architecture as it to how the deployment will affect the campuses
- Good analytical skills
- Project Management and Tools experience
- Ability to prioritize tasks

## **Training Lead**

### **Role Definition**

This role is responsible for leadership of the design, development, and delivery of training courses and materials.

### **Responsibilities**

- Works with the Module Leads and Team Members to allocate and direct functional resources in support of the designated component for the project
- Works with the Technical Lead and Development Lead to allocate and direct technical resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the project
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Leads the development of comprehensive and concise training methods and materials
- Leads the development of the curriculum
- Leads the design, development and delivery of training courses and materials
- Coordinates creation of the documentation of detailed business processes and procedures for use in transition workshops utilizing User Productivity Kit (UPK) technology
- Provides go-live and stabilization support
- Serves on committees as needed



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## **Skills**

- Excellent documentation skills
- Excellent communication skills
- Ability to explain complex functions in a concise manner
- Experience developing training materials using CBT delivery and UPK technology
- Strong leadership skills - ability to lead cross-functional, multi-Campus efforts in managing the changes resulting from the project
- Good analytical skills
- Project Management and Tools experience
- Ability to prioritize tasks

## **PeopleSoft Skills**

- Application Fundamentals
- Application Business Processes

## **Site Readiness Coordinator**

### **Role Definition**

This role collaborates with the Campus Representatives and Campus Project Managers to develop and implement organizational readiness activities.

### **Responsibilities**

- Works closely with the Change Management Lead to ensure a consistent approach to Change Management at all Campuses/sites
- Develops methods and forums to be used to inform the University community of the impending changes to site procedures
- Participates in the design and development of the Liaison program
- Manages and facilitates Communication with Campus Liaisons (through workshops, newsletters, meetings, etc.)
- Manages and evaluates Liaison activities for effectiveness
- Communicates regularly with the Campus Liaisons to provide status on current activities
- Addresses issues raised by individual Campus Liaisons
- Facilitates Transition Workshops
- Manages the identification and development of materials for any Campus Non System User needs (i.e. overview presentations, additional project communications, etc.)
- Supports Training Coordinator with End User Assurance approach and activities in preparation for Go-Live
- Works with Infrastructure Team on PC and software readiness
- Tailors the project level materials to specific Campus needs
- Manages and tracks the execution and completion of assigned project tasks for campus-based activities
- Supports Change Management Lead in the preparation of status reports, within the defined timeframe, from the Campus Liaisons for the designated component documenting progress against the project plan
- Works with the Security Team to handle the logistics of username and password distribution in preparation for go-live



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- Serves on committees as needed

## **Skills**

- Excellent communication skills
- Thorough understanding of the University's organizational structure, policies, procedure and norms and the ability to apply the knowledge to the University's objectives
- *Project Management and Tools experience*
- Ability to prioritize tasks

## **Campus Change Management Coordinator**

### **Role Definition**

Participates in the development and implements a *Change Management* framework utilized during the transition to the new release at the Campus. Collaborates with the Campus Project Manager and Change Management Lead to develop and implement organizational readiness activities.

### **Responsibilities**

- Ensure adherence to overall Change Management approach while insuring that cost, schedule, and performance requirements are fulfilled at the Campus
- Participate in UMass-wide change management planning and activities
- Participate in change impact assessment and analysis activities; coordinate campus participation for work sessions
- Coordinate overall Change Management implementation, schedules, issue resolution at the Campus
- Communicate status to Change Management, Campus Project Management, and Campus Management as appropriate
- Manage, schedule and provide oversight of Change Management Teams, including Site Readiness, Communications, Training, Helpdesk Coordination, and all sub-teams
- Develop criteria for Change Management success, Campus-level site readiness, training effectiveness, etc.
- Track Change Management campus methods, issues, and revise as needed to ensure success
- Design and manage team activities and resources at the Campus, as necessary
- Serves on committees as needed
- Responsible for managing the Campus based Liaison Network

### **Skills**

- Excellent communication skills.
- Thorough understanding of the Campus' organizational structure, policies, procedure and norms and the ability to apply the knowledge to the University's objectives
- Good understanding of the University organization

## **Conversion Lead**

### **Role Definition**



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Leads the development of conversion programs/scripts.

## **Responsibilities**

- Works with the Module Leads to allocate and direct development resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Establishes and ensures quality control during all phases of the project and is accountable for the adherence to development standards and processes
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Provides expertise and leadership to the teams regarding data mapping specifications (tools, formats, default values, fillers, etc.)
- Leads the data cleansing process
- Ensures each campus' unique conversion requirements are met
- Utilize existing development and version control procedures and tools
- Serves on committees as needed

## **Skills**

- Leadership skills
- Software development experience and the ability to apply the knowledge to the University's objectives
- Experience with data conversion efforts
- Project management and tools experience
- Ability to prioritize tasks

## **PeopleSoft Skills**

- Application Fundamentals
- Thorough knowledge of Administration Tools
- Thorough knowledge Development Tools
- Reporting & Analysis Tools

## **Training Resource**

### **Role Definition**

This role is responsible for the design, development, and delivery of training courses and materials.

### **Responsibilities**



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- Work with Change Management Lead and module teams to develop comprehensive and concise training methods and materials
- Work with the University functional resources, Subject Matter Experts, project management, and other managers within the project structure to develop the curriculum
- Supports Site Readiness Coordinator with End User Assurance approach and activities in preparation for Go-Live
- Understand the needs of the participants to enhance the effectiveness of the training
- Ensure that training materials focus on building specific system application skills needed by University personnel
- Design, develop and deliver training courses and materials
- Update existing training materials
- Works with function teams to document detailed business processes and procedures for use in transition workshops
- Tailoring core curriculum offerings developed at the project level with Campus specific data and examples
- Transitioning workshop courses to campus level training resources
- Facilitating train the trainer sessions
- Provides go-live and stabilization support
- Serves on committees as needed

## ***Skills***

- Excellent documentation skills
- Ability to explain complex functions in a concise manner
- Experience developing training materials using CBT delivery

## ***PeopleSoft Skills***

- Application Fundamentals
- Application Business Processes

## ***Campus Training Resource***

### ***Role Definition***

This role is responsible for assisting and supporting in the design, development, and delivery of training courses and materials.

### ***Responsibilities***

- Work with Training Resource and module teams to develop comprehensive and concise training methods and materials
- Work with the University functional resources, Subject Matter Experts, project management, and other managers within the project structure to develop the curriculum
- Understand the needs of the participants to enhance the effectiveness of the training
- Ensure that training materials focus on building specific system application skills needed by Campus personnel
- Design, develop and deliver training courses and materials
- Update existing training materials



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- Works with Training Resource to develop detailed business processes and procedures for use in transition workshops
- Supports transition workshop delivery
- Tailor core curriculum offerings developed at the project level with Campus specific data and examples
- Provides go-live and stabilization support
- Serves on committees as needed

## **Skills**

- Excellent documentation skills
- Ability to explain complex functions in a concise manner
- Experience developing training materials from defined business processes

## **PeopleSoft Skills**

- Application Fundamentals
- Application Business Processes

## **Communications Specialist**

### **Role Definition**

This role manages various methods of communication to keep the project team and the user community informed of the project's goals, objectives, and status.

### **Responsibilities**

- Work with the Change Management Lead and the Project Management to ensure consistent messages are being communicated to the team and throughout the University
- Communicate the project timeline and objectives
- Raise awareness about the project
- Utilize established channels of communication between end users and the project
- Communicate project milestones and accomplishments
- Works with the appropriate team to determine the audience and the appropriate distribution vehicle for each message
- Work with the Change Management Lead to design, develop and execute the communication plan
- Track communication and responses
- Monitor communication effectiveness
- Collaborate with the Change Management Lead and the Campus Change Management team to continually improve the communication plan based on feedback and project changes
- Follow up on feedback sent to the project team
- Serves on committees as needed

### **Skills**

- Excellent verbal and written skills
- Excellent organizational skills
- Ability to galvanize and excite user community using creative presentations and communications



## **Help Desk Staff**

### **Role Definition**

This role responds to Help Desk requests made by project staff.

### **Responsibilities**

- Receives issue requests from project staff
- Records and categorizes problems
- Assists in problem resolution
- Reports on status, follows up on estimates, completion dates, etc.
- Serves on committees as needed

### **Skills**

- Knowledge of Issue Tracking software
- Awareness of PeopleSoft workstation components and installation procedures
- Knowledge of LDAP administration
- Good analytical skills
- Good communication skills

### **PeopleSoft Skills**

- Application specific knowledge to inquire on employee information for verification purposes

## **Campus Help Desk Coordinator**

### **Role Definition**

This role coordinates and schedules the Campus Help Desk staff to provide coverage at the campus level.

### **Responsibilities**

- Receives issue requests from users
- Records and categorizes problems
- Assists in problem resolution
- Work with local Campus Liaison to assist in the execution of site readiness activities and other Campus based activities
- Reports on status, follows up on estimated completion dates, etc.
- Serves on committees as needed

### **Skills**

- Knowledge of Issue Tracking software
- Knowledge of LDAP administration
- Good analytical skills
- Good communication skill



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- Understanding of the campus' organizational structure, policies, procedure and norms and the ability to apply the knowledge to the University's objectives

## **PeopleSoft Skills**

- Application specific knowledge to inquire on employee information for verification purposes

## **Campus Communications Specialist**

### **Role Definition**

This role manages various methods of communication to keep the Campus population informed of the project's goals, objectives and status.

### **Responsibilities**

- Work with the Campus Change Coordinator to ensure consistent messages are being communicated to the Campus
- Communicate the project timeline and objectives
- Raise awareness about the project
- Utilize established channels of communication between end users and the project
- Communicate project milestones and accomplishments
- Work with the Communication Specialist and the Campus Project Manager to determine the audience and the appropriate distribution vehicle for each message
- Work with the Campus Change Coordinator to design, develop and execute the communication plan
- Receive and modify communication messages for the Campus including change control notifications
- Track communication and responses
- Monitor communication effectiveness
- Collaborate with the project Communication Specialist and Campus Change Management Team to continually improve the communication plan based on feedback and project changes
- Channel information back from the Campus to the project team
- Follow up on feedback sent to the project team
- Ensure that project timelines are met for distributing the communications
- Meet with Campus Change Management regularly to address current activities and assess the effectiveness of communication on the Campus
- Identify and communicate issues
- Communicate activity status reports to Campus Change Team in a timely fashion
- Communicate decisions, outcomes, and meeting minutes to appropriate Campus and project audience
- Coordinate/maintain web pages
- Help to manage expectations
- Serves on committees as needed

### **Skills**

- Excellent verbal and written skills
- Understanding of the campus' organizational structure, policies, procedure and norms and the ability to apply the knowledge to the University's objectives



## Technical Roles

### **Infrastructure Lead**

#### **Role Definition**

Provides technical leadership for the project, ensuring that hardware, software and networking strategies are implemented in conjunction with project milestones.

#### **Responsibilities**

- Works with the Module Leads to allocate and direct technical resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the Project Management Team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the project
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Defines the technical architecture
- Manages the technical infrastructure resources
- Coordinates the installation of upgrades and fixes
- Reviews and approves a plan for stress testing
- Reviews and approves a plan for volume testing
- Coordinates multi-Campus activities to ensure remote access
- Reviews and approves desktop strategy for PeopleSoft
- Leads the infrastructure implementation team
- Works with the Technology Manager and the University Security Policy Resource, as needed, to modify existing policies and develop new policies based on requirements generated by the project
- Manages the maintenance processes for the PeopleSoft applications environment
- Reviews and approves the deployment and development of a system security matrix
- Serves on committees as needed

#### **Skills**

- Project management and tools experience
- Ability to prioritize tasks
- Solid knowledge of the University's technical infrastructure and policies
- Solid knowledge of trends in technology and the ability to apply the knowledge to the University's objectives
- Solid experience in large system implementations



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- Solid knowledge of architecture support tools
- Technical development skills
- Strong leadership skills
- Excellent negotiation and communication skills

## **PeopleSoft Skills**

- Thorough knowledge of Development Tools
- Thorough knowledge of Administration Tools

## **Conversion Lead**

### **Role Definition**

Leads the development of conversion programs/scripts.

### **Responsibilities**

- Works with the Module Leads to allocate and direct development resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Establishes and ensures quality control during all phases of the project and is accountable for the adherence to development standards and processes
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Provides expertise and leadership to the teams regarding data mapping specifications (tools, formats, default values, fillers, etc.)
- Leads the data cleansing process
- Ensures each campus' unique conversion requirements are met
- Utilize existing development and version control procedures and tools
- Serves on committees as needed

### **Skills**

- Leadership skills
- Software development experience and the ability to apply the knowledge to the University's objectives
- Experience with data conversion efforts
- Project management and tools experience
- Ability to prioritize tasks

## **PeopleSoft Skills**



# **University of Massachusetts**

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- Application Fundamentals
- Thorough knowledge of Administration Tools
- Thorough knowledge Development Tools
- Reporting & Analysis Tools

## **Development Lead**

### **Role Definition**

Leads the development of modifications and enhancements to the PeopleSoft system, including system extensions and customizations, interfaces and reports.

### **Responsibilities**

- Works with the Module Leads to allocate and direct development resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Establishes and ensures quality control during all phases of the project and is accountable for the adherence to development standards and processes
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Provides expertise and leadership to the various development teams
- Analyzes the development impact to other PS modules, interfaces, related tables/views, and pages
- Analyzes the development impact to fixes and subsequent system upgrades
- Establishes standards for development code
- Estimates development work efforts
- Prepares detailed design specifications with analysts and developers
- Performs developer role as needed
- Utilize existing development and version control procedures and tools
- Serves on committees as needed

### **Skills**

- Leadership skills
- Software development experience and the ability to apply the knowledge to the University's objectives
- Experience with data conversion efforts
- Experience with interface programming
- Project management and tools experience
- Ability to prioritize tasks

### **PeopleSoft Skills**



# **University of Massachusetts**

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- Application Fundamentals
- Thorough knowledge of Administration Tools
- Thorough knowledge Development Tools
- Reporting & Analysis Tools

## **Technical Coordinator**

### **Role Definition**

Works with the Technical Team and the Campus Technical Teams to implement a technical strategy in support of the project.

### **Responsibilities**

- Meet regularly with the Campus Technical Coordinators to ensure that technical project requirements are met on schedule and provide feedback and updates to the Technical Team
- Works with Campus Technical Coordinators to verify and update firewalls/networks in support of the project
- Assists Campus Technical Coordinators to troubleshoot desktop, access, and network issues
- Works with the Infrastructure Lead and the Workstation Administrator to determine desktop requirements and communicate those requirements to the campuses
- Works with the Campus Technical Coordinators and Campus Project Managers to ensure that campus team members can access the appropriate documents and applications
- Works with the Campus Technical Coordinators to test desktop, network connectivity, and browser versions for the project
- Works with the Campus Technical Coordinators to ensure third party applications function as expected

### **Skills**

- Ability to prioritize tasks
- Solid knowledge of the University's technical infrastructure and policies
- Knowledge of architecture support tools
- Strong leadership skills and the ability to apply those skills to the University's objectives
- Excellent communication skills

### **PeopleSoft Skills**

- Knowledge of Development Tools
- Knowledge of Administration Tools

## **Scheduling and Operations Lead**

### **Role Definition**

Responsible for the definition of effective production job run(s) for the administrative applications. Manages the sequencing and scheduling of application jobs.



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## **Responsibilities**

- Works with the Module Leads and Team to allocate and direct operational resources in support of the designated component for the project
- Develops and maintains the designated component of the project plan to assist with the overall management of the project in coordination with the project management team
- Responsible for the execution of the component portion of the project plan managing the allocated hours and milestones
- Responsible for recording, within the defined timeframe, of actual hours for the designated component into the project plan
- Prepares status reports, within the defined timeframe, for the designated component documenting progress against the project plan
- Ensures quality control during all phases of the project
- Develops and documents an implementation/rollout plan for the designated component of the project plan
- Establishes standards for the designated component of the project plan
- Establish sound, effective production schedules for the Administrative systems
- Control and streamline job processes as new jobs come on-line and databases grow
- Manage and ensure that all scheduled job runs are performed in the defined business window, i.e. so as not to impact business operations
- Serves on committees as needed

## **Skills**

- Strong technical experience
- Ability to troubleshoot problems under pressure (i.e. under time constraints).
- Understanding of the business functions in the administrative arena and the ability to apply the knowledge to the University's objectives
- Project management and tools experience
- Solid knowledge of Batch Schedule Tool
- Ability to prioritize tasks

## **PeopleSoft Skills**

- Administration Tools

## **Scheduler/Operator**

### **Role Definition**

This role is responsible for the creation and maintenance of job schedules in support of the project.

### **Responsibilities**

- Works with functional teams to create and define job schedules
- Responsible for the monitoring of job schedules on a regular basis
- Prepares batch logs based on defined job schedules
- Works with architecture team members to migrate run controls in support of the project
- Tests batch schedules in conjunction with the functional teams
- Serves on committees as needed



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## ***Skills***

- Expertise in batch controller software
- Some UNIX experience
- Some SQL experience

## ***Operations Support Coordinator***

### ***Role Definition***

This role is responsible for the successful print and distribution of output in support of the project.

### ***Responsibilities***

- Works with functional and architecture team members to test and verify print and print distribution of project output including check and specialized report printing
- Schedules operations staff to support high demand periods in support of the project
- Responsible for the maintenance of printer hardware and any associated printer software
- Monitors and reports print volume on a regular basis
- Works with functional and technical team members to develop and execute daily checklists to ensure system availability
- Serves on committees as needed

### ***Skills***

- Some batch controller software experience
- Some UNIX experience
- Expertise in printer hardware maintenance

## ***Developer (PeopleSoft)***

### ***Role Definition***

Develops and tests modifications, enhancements and customizations to the PeopleSoft system.

### ***Responsibilities***

- Works with the Application Specialists to develop detailed design specifications and documentation
- Customizes existing modules using established tools
- Programs new modules using established tools
- Develops unit tests including test data, test scenarios, and expected results
- Utilize existing development and version control procedures and tools
- Coordinates with DBAs and PeopleSoft Administrators to design and implement database changes as needed
- Works with the Application Specialist to troubleshoot problems
- Serves on committees as needed

### ***Skills***



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- Software development experience and the ability to apply the knowledge to the University's objectives
- Problem solving skills
- Experience with data conversion efforts
- Experience with interface programming
- Experience with relational databases and relational structure models

## **PeopleSoft Skills**

- Application Fundamentals
- Administration Tools
- Development Tools
- Reporting & Analysis Tools

## **Reporting Specialist**

### **Role Definition**

This role develops and tests reporting solutions and assists in the definition and development of the data model to be used.

### **Responsibilities**

- Prepares detailed design specifications with functional and technical teams members
- Develops reporting solutions - reports, data marts, report distribution mechanisms
- Develops unit tests including test data, test scenarios, and expected results
- Utilizes existing development and version control procedures and tools
- Serves on committees as needed

### **Skills**

- Reporting solution development experience and the ability to apply the knowledge to the University's objectives
- Problem solving skills
- Understanding of testing methodologies
- Experience with relational databases and relational structure models including SQL skills
- Knowledge in strategy and delivery of Business Intelligence and Reporting solutions
- Understands the concepts of operational reporting vs Strategic reporting and which environment is appropriate for each
- Defined toolset experience

## **PeopleSoft Skills**

- Application Fundamentals
- Administration Tools
- Development Tools
- Reporting & Analysis Tools



## **PeopleSoft Administrator**

### **Role Definition**

Has overall responsibility for the PeopleSoft application software environment.

### **Responsibilities**

- Migrates PeopleSoft / Oracle objects from one environment to another using project specific procedures
- Applies PeopleSoft fixes to multiple databases
- Installs, tests and supports third party software to work with PeopleSoft
- Implements the Report Distribution strategy; directory structures, etc.
- Assists users and developers when PeopleSoft issues arise
- Assists the Security Team when access issues arise
- Coordinates with Developers and DBAs to design and implement database changes as needed
- Serves on committees as needed

### **Skills**

- Strong SQL knowledge (Including Performance Tuning)
- Some SQR knowledge
- Some Windows Administration
- UNIX, UNIX scripting
- Knowledge of BEA - Tuxedo
- Knowledge of BEA - Weblogics
- Knowledge of Oracle Application Server
- Knowledge of Oracle database structures
- Knowledge of Customer Connection databases

### **PeopleSoft Skills**

- Application Fundamentals
- Administration Tools
- Development Tools
- Reporting & Analysis Tools

## **PeopleSoft Upgrader**

### **Role Definition**

Has responsibility for executing the technical upgrade of the PeopleSoft application software.

### **Responsibilities**

- Evaluation/execution of all upgrade scripts
- Tuning of upgrade scripts
- Works with Conversion/Development Lead, PeopleSoft Administrator, and the Database Administrator for scheduling of backups and refreshes of development and test environments
- Assist with scheduling of all mock conversions and production cutover activities



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- Assist with porting of data between applications where applicable
- Assist in applying patches and fixes associated with upgrade
- Assist with new batch scheduler activities associated with upgrade
- Serves on committees as needed

## **Skills**

- Strong SQL knowledge (Including Performance Tuning)
- Some SQR knowledge
- Some Windows Administration
- UNIX, UNIX scripting
- Knowledge of BEA - Tuxedo
- Knowledge of BEA - Web logics
- Knowledge of Oracle Application Server
- Knowledge of Oracle database structures
- Knowledge of Customer Connection databases

## **PeopleSoft Skills**

- Application Fundamentals
- Administration Tools
- Development Tools
- Expert knowledge of PeopleSoft Upgrade Tool

## **NT Systems Administrator**

### **Role Definition**

Responsible for establishing PeopleSoft file servers, CITRIX servers and NT application servers.

### **Responsibilities**

- Work with LAN Administrators to serve as the primary support contact for technical problems attributed to PC or network environments.
- Assist in defining requirements for and procurement of NT servers.
- Receive and perform basic configuration for all NT servers.
- Responsible for backup/restore procedures and tools on NT servers.
- Responsible for virus prevention on NT servers.
- Evaluate and apply Windows NT service pack releases.
- Responsible for high availability design and implementation for NT servers.
- Responsible for disaster recovery design and implementation for NT servers.
- Responsible for NT security design and implementation.
- Responsible for startup/shutdown procedures and tools on NT servers.
- Responsible for monitoring procedures and tools on NT servers.
- Responsible for CITRIX/TSE design and implementation.
- Supports application and print testing on defined client configurations
- Participation in planning and execution of operational readiness testing.
- Serves on committees as needed.

## **Skills**



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- Strong Windows Management Skills
- Networking skills

## **UNIX Administrator**

### **Role Definition**

Establishes the application UNIX environment and ensures stability. Maintains UNIX servers, external disk and tape management systems.

### **Responsibilities**

- Recommends hardware configuration
- Installs hardware
- Manages physical file system layout
- Ensures reliable batch processing environment for the PeopleSoft applications
- Maintains hardware configuration including storage facility
- Installs UNIX operating system, upgrades, patches
- Monitors system performance
- Schedules and monitors system backups
- Maintains operating procedures, user IDs, recovery plans
- Designs, creates, documents, and tests UNIX scripts
- Serves on committees as needed

### **Skills**

- Strong UNIX management skills.
- Strong skills in installation and maintenance of the UNIX operating system.
- UNIX scripting, shell / perl scripting.
- FTP, TCP/IP configuration.
- SAMBA
- Knowledge of Oracle as relates to UNIX installations and maintenance.
- Strong Knowledge of Solaris and Linux (Red-Hat)

## **Database Administrator**

### **Role Definition**

Establishes and maintains reliable and well performing databases for production and production support.

### **Responsibilities**

- Installs application software
- Maintains Oracle user security
- Applies Oracle patches
- Coordinates with Developers and PeopleSoft Administrators to design and implement database changes as needed
- Monitors Oracle backups and performance
- Executes performance tuning and testing



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- Executes volume and stress tests
- Evaluates and installs Oracle related software for backups/transfers
- Ensures the integrity of all system objects including table definitions, structure definitions, domains, data elements, views, etc.
- Provide SQL support to developers
- Reviews log directories, table sizes, indexes, etc. for capacity planning
- Plans and executes disaster recovery
- Participates with Functional Team to test disaster recovery procedures
- Serves on committees as needed

## ***Skills***

- Strong Oracle database skills (import/export, archiving, parallel query, hints and triggers) and the ability to apply the knowledge to the University's objectives
- Strong SQL skills
- Knowledge of UNIX
- Knowledge of the PeopleSoft system architecture
- Experience troubleshooting large databases.

## ***Workstation Administrator***

### ***Role Definition***

Assists the Campus based specialists in the rollout and maintenance of the desktop strategy.

### ***Responsibilities***

- Customizing the workstation as required in support of the project
- Troubleshoot and correct workstation performance problems
- Assists in the design of the desktop software upgrade methodology
- Responsible for troubleshooting the network connection between the workstation and the project environment
- Serves on committees as needed

### ***Skills***

- Knowledge of windows administration
- Knowledge of network protocols
- Ability to troubleshoot PC configuration problems

## ***Network LAN/WAN/Firewall Coordinator***

### ***Role Definition***

Coordinates the efforts of the Network LAN/WAN/Firewall Specialists across the university.

### ***Responsibilities***

- Monitors networks.



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- Level 1 fault analysis.
- Proactive problem management.
- Manage the carrier fault line resolution.
- Dispatch of support engineer if required.
- Serves on committees as needed.

## **Skills**

- Leadership skills
- Troubleshooting skills.
- Strong communication skills.
- Network proficiency in the following areas:
  - Hardware: Switches, Routers, hubs
  - Firewall, security, VPN
  - Hardware load balancer
  - Topologies: 10/100 and Gigabit Ethernet, T1, T3, ATM, LAN/WAN
- Experience with Network General Sniffer
- Network implementation and documentation
- NMS experience (OpenView/Spectrum)

## **PeopleSoft Skills**

- Experience troubleshooting network issues related to Tuxedo, PeopleSoft and Citrix is desirable
- Knowledge of the PeopleSoft architecture

## **Campus Network LAN/WAN/ Firewall Specialist**

### **Role Definition**

Administers the networks and computing resources within their departments.

### **Responsibilities**

- Work with Systems Administrators and Developers to serve as the primary support contact for technical issues attributed to PC or network environments
- Perform firewall configurations in support of PeopleSoft development effort
- Participate as a member of the network design team
- Support the integration testing and deployment phases as required
- Serves on committees as needed

### **Skills**

- Troubleshooting skills
- Network proficiency in the following areas:
  - Hardware: Switches, Routers, hubs
  - Firewall, security, VPN
  - Topologies: 10/100 and Gigabit Ethernet, T1, T3, ATM, LAN/WAN
- Experience with Network General Sniffer



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- Network implementation and documentation
- NMS experience (OpenView/Spectrum)

## ***Campus Workstation Specialist***

### ***Role Definition***

A campus based position responsible for the network connection between the workstation and the database server.

### ***Responsibilities***

- Customizing the workstation as required.
- Monitors and corrects workstation performance problems.
- Resolves printing problems.
- Assists in the design of the desktop software upgrade methodology.
- Serves on committees as needed.

### ***Skills***

- Ability to configure desktop protocols.
- Ability to troubleshoot PC configuration problems.
- Knowledge of Windows Administration

## ***Campus Technical Coordinator***

### ***Role Definition***

Works closely with the Technical Coordinator to coordinate the technical resources at the campus level.

### ***Responsibilities***

- Primarily responsible to ensure system availability to the PeopleSoft users: NT, UNIX, desktop, dial-up, connectivity.
- Work with the campus technical administrators and SSO technical resources to coordinate tasks and troubleshoot problems.
- Serves on committees as needed.

### ***Skills***

- Strong technical skills
- Leadership skills



## Vendor Specific Roles

### **Vendor Project Executive**

#### **Role Definition**

This role interacts with the Project Executive to provide executive project oversight. Intervenes as needed to address and facilitate resolution of vendor related contract, project, and resource issues. Plays an advisory role in setting priorities, scope, and direction of the project. Maintains contact with the University Executive Team to ensure their expectations and objectives are met.

#### **Responsibilities**

- Participates in the determination of success criteria
- Responsible for the timely resolution of escalated issues
- Monitors project costs at the executive level
- Monitors project progress against milestones and timeline
- Communicates with the Executive Committees on issues regarding executive intervention and issue escalation
- Advise University executives on impact of customization requests and scope changes

#### **Skills**

- Executive level management and communication skills

### **Vendor Project Director**

#### **Role Definition**

This role, working in conjunction with the University Project Director, provides leadership and overall direction for the project ensuring adherence to the budget, scope, and project milestones.

#### **Responsibilities**

- Make vendor resource allocation decisions and assignments
- Monitors the project budget and provides status to the Vendor Project Executive
- Reviews project planning standards and guidelines to be used by functional and technical resources/teams ensuring a consistent approach
- Reviews scope changes adhering to Change Control guidelines
- Monitor the effectiveness and "fit" of vendor consultants
- Address resource issues and concerns with University project leadership
- Communicate project progress and issues to University Executives and Senior Management
- Communicate University executive and senior management issues to vendor team
- Address changes in project scope with University project leadership
- Monitor project progress and address project issues with University project leadership

#### **Skills**



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- Experience managing complex projects
- Significant experience with information systems deployment and support and the ability to apply the knowledge to the University's objectives
- Strong leadership skills
- Strong project management skills
- Demonstrated issue and conflict resolution skills
- Excellent communication and negotiating skills

## **Quality Assessment Advisor**

### **Role Definition**

This role provides reviews of key points of the project to the Executive Team identifying risks and successes and an overall project assessment through personal interviews.

### **Responsibilities**

- Audit project at key milestone deliverables to insure quality and consistency is maintained
- Confirms project standards are being met for documentation for identified key points of the project
- Confirms project standards are met for all development activities
- Audit designs for designated best practices
- Audit testing activities and tracking to insure quality deliverables
- Delivers findings to the Executive Management Team

### **Skills**

- Excellent communication skills
- Excellent auditing skills
- Solid understanding of project life cycle methodology.
- Solid understanding of administrative systems' processes.

### **PeopleSoft Skills**

- Good understanding of PeopleSoft system features and conventions.