

1 Meeting Logistics

Item	Description
Date(s)	3 weekdays, dates TBD
Time	TBD
Location	TBD – can be onsite or remote, depending on client needs

2 Attendees

Role	Name
Facilitator	Jeff Handa SunGard Higher Education Luminis™ Services, Senior Process Consultant
Other Participants	TBD (Attendees Identified by Client)

3 Preparation

- Schedule a meeting room to accommodate the anticipated number of participants. Arrange the room in a u-shaped layout and provide the following equipment/materials:
 - Internet connection for consultant's laptop
 - Data projector that can connect to consultant's laptop
 - Whiteboard and/or flipchart with markers
 - Notepads
 - Post-it notes
 - Pens
 - Markers
- Distribute the list of interview questions to four high priority, high readiness departments at the institution in preparation for the information interviews.

4 Purpose

The **Luminis™ Platform Functional Integration** workshop is designed to accomplish two distinct sets of objectives that are critical to realizing the Unified Digital Campus (UDC) vision through the Luminis™ Platform. The first set of objectives is focused on developing a strategic view of the institution's core communications and information processes. The Luminis rollout is the first step in an ongoing evolution as the community increasingly uses the portal & UDC functionality to make the right information & functionality available to the right people at the right time in the right way.

The second set of objectives focuses on structuring the Luminis deployment in a way that maximizes the impact of the SunGard Higher Education UDC components. Key touch points between Luminis and other UDC products will be identified and explored in detail. During the **Luminis™ Platform Functional Integration** workshop, SunGard Higher Education consultants will work with institutional project teams (such as the Banner implementation team) so that each is aware of important dependencies and can accommodate them in the context of the individual projects. Awareness of dependencies will also help the project teams avoid making decisions that may negatively impact other projects. Finally, understanding the dependencies can help the Luminis team make better decisions about how and when to deploy current and future UDC functionality through the portal.

These key objectives could be customized based on an institution's unique goals and objectives for Luminis.

5 Client Outcomes

The following outcomes are designed to develop a strategic view of the institution's core processes of communication and information flow.

- An understanding of the critical information and communications flows for each key institutional constituency
- An understanding of the ways that Luminis and UDC functionality can enhance those information and communications flows
- An understanding of a process for collaborating with key information providers to enable them to think strategically about Luminis
- An understanding of how to develop an institutional plan for portal evolution
- An understanding of the key Luminis information pathways and a first draft of those work flows for the institution in the form of an Information Architecture Analysis.

The following outcomes are designed to maximize the various SunGard Higher Education UDC components through the deployment of Luminis

- Ensure alignment of, and reconcile functional needs across the enterprise, as they relate to Luminis as the core of the UDC, so that all teams are taking full advantage of integration components and agree on how these will best serve the institution and its constituents.
- Reconcile implementation timelines, to ensure that teams are working in concert with one another, for those clients concurrently implementing Banner.
- Establish recommendations so that the institution can make the most of their UDC environment.
- An organizational understanding of the key technical facets of Luminis that are important for strategic planning.

6 Deliverables

- Information Architecture Analysis
- Information Interview Summary of Responses
- UDC Dependency Matrix

7 Agenda

Topic	Time	Owner	Participants
Day 1: <Day, Date> 8:30 am – 9:00 am Meet with project lead to set-up room, review delivery, address any concerns, test WebEx connection (if needed)	(:45)	Project Lead	Recommended Audience: <i>SunGardHE Consultant and Project Lead</i>
<u>Defining an Institutional Vision: Review Project Definition & Develop Strategic Goals</u> 9:00 am – 10:00 am <ul style="list-style-type: none"> • Review Project Definition Document (PDD) • Review Institutional Mission & Strategy • Evaluate Luminis Project Goals in PDD • Align and Refine Luminis Goals • Identify Metrics and “Soft” Indicators of Luminis Goal Attainment • Identify Mechanism to Monitor Metrics 	(1:00)	Consultant	Recommended Audience: <i>Project Team Lead (PM) and Content Work Team Lead</i>
<u>Information Architecture Analysis I: Identifying Information Providers</u> 10:00 am – 12:00 pm <ul style="list-style-type: none"> • Identify Institutional Information Providers <ul style="list-style-type: none"> ○ Review Organizational Chart ○ Review Departments ○ Review Employee Organizations ○ Review Faculty Organizations ○ Review Student Organizations ○ Review Work Groups or Other Ad Hoc & General Organizations • Triage Information Providers <ul style="list-style-type: none"> ○ Rate Information Providers in Terms of their Readiness to Utilize Luminis (1-3) ○ Develop List of Early Adopters • Evaluate Early Adopters <ul style="list-style-type: none"> ○ Identify Individual Information Owners ○ Evaluate Providers in terms of their Ability to Administer Luminis Tools ○ Identify their Primary Target Audiences ○ Identify their Potential Interest in Luminis Functionalities 	(2:00)	Consultant	Recommended Audience: <i>Project Team Lead (PM) and Content Work Team Lead</i>

Topic	Time	Owner	Participants
<u>Lunch: 12:00 pm – 1:00 pm</u>	(1:00)		
<u>Information Architecture Analysis II: Identifying Information Resources</u> 1:00 pm – 2:00 pm <ul style="list-style-type: none"> Identify Institutional Information Resources <ul style="list-style-type: none"> Web site Intranet Internal Functionalities 3rd Party Functionalities Key Data Stores (E.g., Library) Key Publications (Online & Print) Identify Information Owners & Audiences <ul style="list-style-type: none"> Identify Owner/Administrator for each Information Resource Noted Above Identify Primary Information Providers and Target Audiences for each Resource Web & Intranet Information Inventory <ul style="list-style-type: none"> Develop Information Inventory & Taxonomy 2 Levels Deep 	(1:00)	Consultant	<i>Recommended Audience: Project Team Lead (PM) and Content Work Team Lead</i>
<u>Information Architecture Analysis III: Identifying Information Pathways</u> 2:00 pm – 4:00 pm <ul style="list-style-type: none"> Identify All Modes of Information Publication <ul style="list-style-type: none"> For Faculty, Students, Staff For High Priority Information Providers Identify Work Flows for Each Method Identify All Key Luminis Information Pathways <ul style="list-style-type: none"> Targeted Announcements Channels Groups Fragments/Layouts Imported Groups/Attributes/Custom Roles Filters/Skins/Permissions Identify Key Roles for Each Information Pathway <ul style="list-style-type: none"> Information Providers Approved Requestors Administrators Approvers 	(2:00)	Consultant	<i>Recommended Audience: Project Team Lead (PM) and Content Work Team Lead</i>
<u>Portal Evolution: A Conceptual Overview</u> 4:00 pm – 5:00 pm <ul style="list-style-type: none"> Identify Key Dimensions of Evolution Identify Key Early Adopters in Portal Implementation 	(1:00)	Consultant	<i>Recommended Audience: Project Team Lead (PM) and Content Work Team Lead</i>

Topic	Time	Owner	Notes
Day 2: <Day, Date> 8:30 am – 9:00 am Consultant Set Up	(:30)	Consultant	
<u>Luminis Functional Integration – Part I</u> 9:00 am – 10:30 am <ul style="list-style-type: none"> Review all Luminis Channels for Banner Verify current functionality, determine what functionality is required, customization process. 	(1:30)	All	<i>Recommended Audience: Organizational Team members; Banner Functional Leads, and potentially Banner “Super Users”</i>
<u>Luminis Functional Integration – Part II</u> 10:45 am – 12:00 pm <ul style="list-style-type: none"> Roles and Their Implications <ul style="list-style-type: none"> Introducing Roles Role Generation in Banner Roles and Permissions 	(1:15)	All	<i>Recommended Audience: Organizational Team members; Banner Functional Leads, and potentially Banner “Super Users”</i>
<u>Lunch:</u> 12:00 – 1:00 p.m.	(1:00)	All	
<u>Luminis Functional Integration – Part III</u> 1:00 pm – 4:00 pm <ul style="list-style-type: none"> Roles and Their Implications (continued) <ul style="list-style-type: none"> Smart and Notify Events Information Targeting Attribute Queries vs. Custom Roles The Extract Process Banner Survey Luminis Data Integration 	(3:00)	All	<i>Recommended Audience: Organizational Team members; Core Project Team members</i>

Topic	Time	Owner	Notes
Day 3: <Day, Date> 8:30 am – 9:00 am Consultant Set Up	(:30)	Consultant	
<u>Information Interview 1</u> 9:00 am – 10:15 am <ul style="list-style-type: none"> • Quick Portal Demo/Overview • Identify Strategic Goals for Department • Identify Go-Live Needs for Luminis Functionality • Identify Target Audiences • Identify Key Attributes for More Granular Information Targeting • Identify Key Work Flows • Identify Key Messages • Identify Needs for SSO • Identify Needs for Application Development • Identify Current Highly Utilized Mechanisms for Publishing Information and Associated Work Flows 	(1:15)	Consultant	<i>Recommended Audience:</i> <i>Project Team Lead (PM), Content Work Team Lead, and One High Priority Information Provider or Department</i>
Break – 10:15 am – 10:30 am	(:15)		
<u>Information Interview 2</u> 10:30 am – 11:45 am	(1:15)	Consultant	<i>Recommended Audience:</i> <i>See above</i>
<u>Lunch</u> – 11:45 am – 1:00 pm	(1:00)		
<u>Information Interview 3</u> 1:00 pm – 2:15 pm	(1:15)	Consultant	<i>Recommended Audience:</i> <i>See above</i>
Break – 2:15 pm – 2:30 pm	(:15)		
<u>Information Interview 4</u> 2:30 pm – 3:45 pm	(1:15)	Consultant	<i>Recommended Audience:</i> <i>See above</i>
Break – 3:45 pm – 4:00 pm	(:15)		
<u>Wrap Up</u> 4:00 pm – 5:00 pm <ul style="list-style-type: none"> • Information Interview Debrief • Preparing for Content Planning • Q & A 	(1:00)	All	<i>Recommended Audience:</i> <i>See above</i>

8 Decisions

Decisions will be documented in the UDC Functional Integration Follow-up Report.

9 Action Items

Action Items will be documented in the UDC Functional Integration Follow-up Report.

10 Document History

Revision Record

Number	Date & Sections	Author	Notes
1.0			
1.1			
1.2			