

## 1 Meeting Logistics

Item	Description
Date(s)	TBD
Time	TBD
Location	TBD

## 2 Attendees

Role	Name
Facilitator	Jeff Handa Senior Process Consultant, SunGard Higher Education Luminis <sup>™</sup> Services
Other Participants	Project Manager, Functional Project Lead, Technical Project Lead, and other key Project Team members.
Not in Attendance	TBD

## 3 Preparation

- Schedule a meeting room to accommodate the anticipated number of participants. Arrange the room in a conference-style layout and provide the following equipment/materials:
  - Internet-connected workstation
  - Data projector connected to workstation
  - Conference-style speaker phone centrally located to all participants with quality microphone and speaker(s) if scheduled for remote delivery
- Complete and send the following information to consultant by September 19, 2008:
  - **Communication/Marketing Plans** – Send updated/validated critical documents that detail the institution's communication/marketing plans for the project.
  - **Training Plans** – Send updated/validated critical documents that detail the institution's training plans for the project.
  - **Content Plans** – Send updated/validated critical documents that detail the institution's content plans for the project.
  - **Production System Access** – Send URL and login credentials to the production system that will allow review of all role-based content.
  - **Action Plan** – Refer to attachment; complete the status and add any pertinent notes to each recommended action item. Add additional action item information developed during the implementation process. If a compiled Action Plan already exists, it may be sent in lieu of the attached
  - **Other information** – Send any additional information that you would like reviewed with detailed explanation of the significance.

## 4 Purpose

The **Luminis™ Platform Organizational Production Readiness Service** workshop is designed to verify that the institution is organizationally ready to go live with the Luminis™ Platform for its chosen targeted audience. Sungard Higher Education consultant assessments are shared with the project team during a series of conference calls or onsite meetings and in a written report.

SunGard Higher Education consultants will evaluate the following organizational areas:

- Organizational Readiness
- Communication Readiness
- Training Readiness
- Content Readiness
- Custom or client-identified readiness items

Once the assessments are complete, the consultant will provide the client with a Production Readiness Assessment Report. Consultants will work with the project team to provide support for completing outstanding items identified in the Report.

In addition, the 40-hour delivery allows for customized services designed to support the deployment (“go-live”) of the portal. These services vary by institution, but may include additional content administrator training, a “train the trainer” workshop, internationalization services, and/or additional work on marketing and communications planning. These services may be delivered remotely or onsite depending on the institution’s needs.

## 5 Desired Outcomes

- Validate client readiness for go-live
- Document open readiness items
- Identify action plans to resolve open items
- Other outcomes as defined by consultant and client

## 6 Deliverables

- Production Readiness Assessment Report
- Production Readiness Checklist

## Agenda

Topic	Time	Owner	Notes
<b><u>Portal Review by Consultant</u></b> Off site preparatory review of production environment and documentation of areas for further discussion during workshops	8 Hrs.	Consultant	<i>To be completed PRIOR to any remote or onsite meetings and workshops with the client</i>
<b><u>Project Leadership Meeting</u></b> <ul style="list-style-type: none"> <li>• Introduction</li> <li>• Workshop Overview</li> <li>• Review Goals &amp; Objectives</li> <li>• Review Communication Plans</li> <li>• Review Training Plans</li> <li>• Review Content</li> <li>• Review Project Action Plan</li> <li>• Wrap-up</li> </ul>	2 Hrs.	Project Team	<b><i>Recommended Audience:</i></b> <i>Project Manager, Functional Project Lead, Technical Project Lead, and other key Project Team members (for example, Training, Communication, or other Committee Chairs)</i>
<b><u>Content Planning Review</u></b> <ul style="list-style-type: none"> <li>• Review prioritized items from OIG</li> <li>• Review Layouts from Content Planning <ul style="list-style-type: none"> <li>○ Review PROD Portal</li> <li>○ Walkthrough of Each Layout</li> <li>○ Walkthrough of content-related user attributes</li> </ul> </li> <li>• Review Status of Content Owners &amp; Administrators <ul style="list-style-type: none"> <li>○ Review PROD Portal</li> <li>○ Review Fine-Grained Access Control</li> </ul> </li> <li>• Review Status of Channels <ul style="list-style-type: none"> <li>○ Review PROD Portal</li> <li>○ Review Luminis Channels for Banner</li> </ul> </li> </ul>	2 Hrs.	Project Team	<b><i>Recommended Audience:</i></b> <i>Project manager, functional lead, and project team members involved in content planning, content development, content management, and content-related policies and procedures</i>
<b><u>Organizational Planning Review</u></b> <ul style="list-style-type: none"> <li>• Review Stakeholder Analysis</li> <li>• Review Communications Plan</li> <li>• Review Training Plan</li> <li>• Review Milestones</li> </ul>	2 Hrs.	Project Team	<b><i>Recommended Audience:</i></b> <i>Project manager, functional lead, and project team members involved in communications planning and implementation, training planning and implementation, and support/HD planning and implementation</i>

Topic	Time	Owner	Notes
<b><u>Action Plan Review</u></b> <ul style="list-style-type: none"> <li>Review Action Plan <ul style="list-style-type: none"> <li>Dashboard Each Item</li> <li>Identify Completion &amp; Due</li> </ul> </li> <li>Review Specific PRR Items <ul style="list-style-type: none"> <li>Dashboard Each Item</li> <li>Dates</li> <li>Identify Responsible Parties</li> <li>Identify Items to Complete Tasks</li> </ul> </li> </ul>	2 Hrs.	Project Team	<b><i>Recommended Audience:</i></b> <i>Project Manager, Functional Project Lead, Technical Project Lead, and other key Project Team members (for example, Training, Communication, or other Committee Chairs)</i>

## 7 Decisions

Decisions will be documented in the Production Readiness Assessment Report.

## 8 Action Items

Action Items will be documented in the Production Readiness Assessment Report.

## 9 Document History

### Revision Record

Number	Date & Sections	Author	Notes
0.1		Jeff Handa	Draft
1.1			
1.2			

## 10 Appendix

### Production Readiness Service Hours

The Luminis™ Platform Production Readiness Service is a 40 hour remote service. While certain aspects of the service, and their associated hours, are considered standard, other components of the service are selected on the basis of institutional needs and may vary with each Luminis™ implementation. This chart is designed as a reference for clients, consultants, and project managers and should be adjusted as needed to fit each institution.

Standard Components	Hours
Consultant Review of Portal (remote; conducted prior to any other activity)	8
Project Leadership Meeting (remote or onsite)	2
Content Planning Review (remote or onsite)	2
Organizational Planning Review (remote or onsite)	2
Action Plan Review (remote or onsite)	2
Preparation of Readiness Assessment Report (consultant follow-up; remote)	8
TOTAL	24

<b>Client-Selected Components</b>	<b>Hours</b>
Train-the-Trainer Workshop	4 - 8
Advanced Content Administrator Training and/or Content Development	4 - 8
Internationalization Workshop	4 - 8
Marketing and Communication Workshop	4 - 8
Other services as identified by consultant and client	4 - 8
TOTAL (selected services)	16

<b>SAMPLE – Remote Delivery of PRS</b>	<b>Hours</b>
Consultant Review of Portal	8
Project Leadership Meeting	2
Content Planning Review	2
Organizational Planning Review	2
Action Plan Review	2
Train-the-Trainer Workshop	6
Advanced Content Admin Training	6
Marketing and Communication Workshop	4
Preparation of Readiness Assessment Report	8
TOTAL	40

<b>SAMPLE – Onsite Delivery of PRS</b>	<b>Hours</b>
Consultant Review of Portal	8
Consultant Travel	8
Project Leadership Meeting	2
Content Planning Review	2
Organizational Planning Review	2
Action Plan Review	2
Advanced Content Admin Training	8
Preparation of Readiness Assessment Report	8
TOTAL	40