

R25™

Implementation Checklist



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R25 Implementation Checklist

Your Implementation Team

Before you begin the R25 implementation process, assemble an implementation team of schedulers, technical personnel, and campus service providers—experts in your scheduling environment and data, event support services, and R25 technical environment.

Your team should include:

- A **project manager** who understands campus policies and politics, is authorized to make R25 implementation decisions, and is effective at managing the efforts of others on the team.
- **Key academic and non-academic schedulers** who are highly familiar with the policies and practices of your event scheduling environment and the event-related data you maintain
- **Key event service providers** who are highly familiar with the services required to support events on your campus
- A **Database Administrator** able to administer your database management system (DBMS) software and install and administer R25
- An **R25 System Administrator** who understands your school's scheduling needs and is able to set up R25 security, define R25 system settings, and manage the needs of R25 users
- A **Network Administrator** who is able to manage the network used by R25 to communicate with your DBMS and file servers
- A **Web Administrator** who is able to install, configure, and customize the R25 WebViewer

Documentation

All of the documents referenced in this checklist (except the R25 download instructions) can be accessed from the Series25 customer site page of the CollegeNET web site:
corp.collegenet.com/depts/higher_ed/series/customer/support/

Phase 1 - Planning Your R25 Implementation

Done ✓	Task	Responsible Party
<input type="checkbox"/>	<p>1 Develop an implementation plan and timeline. Decide how you want to “roll out” R25 to your campus scheduling offices. Review the entire implementation checklist and decide who’ll do what/when.</p>	R25 implementation team
<input type="checkbox"/>	<p>2 Determine whether you have the required hardware and software to install and run R25 and the R25 WebViewer. If not, purchase and install what’s needed.</p> <p>Document reference: <i>R25 Technical Specifications</i></p>	R25 implementation team with assistance from IT personnel and system and network administrators
<input type="checkbox"/>	<p>3 Determine who will attend the R25 Data Preparation and R25 Application Support training courses at CollegeNET headquarters in Portland, Oregon. Determine when selected personnel will attend, and have them register for training.</p> <p>Members of the R25 implementation team and others who will be preparing R25 data should attend R25 Data Preparation.</p> <p>IT personnel and system administrators who will be installing R25, implementing your SIS-R25 interface, implementing the R25 WebViewer, performing system administration functions, and/or giving technical support to R25 users should attend R25 Application Support.</p> <p>You can view R25 course details and register and pay for courses on the Series25 Learning Center page of the CollegeNET web site: corp.collegenet.com/depts/higher_ed/series/learning/</p>	R25 implementation team
<input type="checkbox"/>	<p>4 Attend R25 Data Preparation training.</p>	Those members of the implementation team and others who will be preparing R25 data
<input type="checkbox"/>	<p>5 Attend R25 Application Support training.</p>	System administrators and IT personnel
<input type="checkbox"/>	<p>6 Select your R25 data preparation “track.”</p> <p>Document reference: <i>Chapter 1 of any of the R25 Data Preparation Workbooks</i></p>	R25 implementation team

Phase 2 - Installing R25

Done ✓	Task	Responsible Party
<input type="checkbox"/>	1 Download the R25 software. Document reference: <i>Download instructions</i> - available by calling 503.973.5250 or emailing support@collegenet.com.	R25 system administrator
<input type="checkbox"/>	2 Read the <i>R25 Installation Instructions</i> .	R25 system administrator
<input type="checkbox"/>	3 Install R25. If you have purchased an SIS-R25 interface from CollegeNET, the Interface is installed with R25. Document reference: <i>Installation script online help and R25 Installation Instructions</i> . If you have purchased an SIS-R25 Interface from CollegeNET, also see <i>the R25 interface supplement for your SIS</i> .	R25 system administrator
<input type="checkbox"/>	4 Install the R25 sample database.	R25 system administrator
<input type="checkbox"/>	5 If you've licensed Schedule25, install it. Document reference: <i>Schedule25 Installation and Update Instructions</i>	R25 system administrator

Phase 3 - Setting R25 Functional Security

Done ✓	Task	Responsible Party
<input type="checkbox"/>	1 Identify potential R25 users: <ul style="list-style-type: none"> • Academic event schedulers • Non-academic event schedulers • Supervisory personnel • System Administrators • IT personnel • Service providers • Others 	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	2 Determine the functional security settings required for each of the R25 users you've identified. Document reference: <i>Security and Business Practices</i>	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	3 Add R25 data preparation users. Document reference: <i>Security and Business Practices</i>	System administrator
<input type="checkbox"/>	4 Set up an R25 security group that includes all the data preparation users you added in step 3. Users performing data entry tasks must have full control on all directories, records, frameworks, and master definitions. Document reference: <i>Security and Business Practices</i>	System administrator
<input type="checkbox"/>	5 Set up security groups for other "like" groups of users. Document reference: <i>Security and Business Practices</i>	System administrator

Phase 4 - Getting Ready for R25 Data Preparation

Done ✓	Task	Responsible Party
<input type="checkbox"/>	<p>1 Assess your current campus scheduling data in light of the data preparation track you've chosen. In each of the pertinent data areas listed below, determine how much data you have (and need), where it is stored, and who maintains and controls it.</p> <ul style="list-style-type: none"> • Spaces • Resources (equipment, services, personnel) • Organizations that schedule events on your campus (academic departments, on-campus groups, off-campus groups) • Organization contacts • Academic events • Non-academic events 	<p>R25 implementation team with assistance from other key campus personnel as needed</p>
<input type="checkbox"/>	<p>2 Set initial R25 system definitions.</p> <p>Document reference: <i>System Definitions and Defaults</i>, and for information on setting the Data Entry system definition in preparation for data preparation, see Chapter 2, "Getting Started" in Workbook 1: Preparing Data on Spaces and Resources</p>	<p>System administrator</p>

Phase 5 - Preparing R25 Data

Done ✓	Task	Responsible Party
<input type="checkbox"/>	1 Inventory your campus spaces.	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	2 Identify the space preferences of academic departments and other groups that sponsor events on your campus.	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	3 Based on the data preparation “track” you’ve chosen: <ul style="list-style-type: none"> • Create the appropriate space master lists. • Create space records. • Create space relationships. • Enter the open/close hours of each space. • Enter the blackout dates/times of spaces as needed. <p>Document reference: <i>Workbook 1: Preparing Data on Spaces and Resources</i>, and for information on entering blackout dates/times, see <i>Security and Business Practices</i></p>	Those members of the implementation team and others assigned to prepare R25 data
<input type="checkbox"/>	4 Put together a list of your campus resources.	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	5 Categorize your resource list by type (equipment, services, personnel, and so on), and determine who (if anyone) needs to be notified when a particular resource is requested for an event.	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	6 Based on the data preparation “track” you’ve chosen: <ul style="list-style-type: none"> • Create the appropriate resource master lists. • Create resource records. • Create resource relationships. <p>Document reference: <i>Workbook 1: Preparing Data on Spaces and Resources</i></p>	Those members of the implementation team and others assigned to prepare R25 data

Phase 5 - Preparing R25 Data, continued

Done ✓	Task	Responsible Party
<input type="checkbox"/>	7 Identify all departments and organizations that sponsor events on your campus and their associated contacts.	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	8 Based on the data preparation “track” you’ve chosen: <ul style="list-style-type: none"> • Create the appropriate organization and contact master lists. • Create organization records, remembering to specify the S25 key and campus partition preferences of each department whose classes will be assigned space using Schedule25. • Create contact records. • Associate the appropriate contacts with each organization. <p>Document reference: <i>Workbook 2: Preparing Data on Organizations and Contacts</i></p>	Those members of the implementation team and others assigned to prepare R25 data
<input type="checkbox"/>	9 Based on the data preparation “track” you’ve chosen, create the appropriate event master lists. Document reference: <i>Workbook 3: Preparing Data for Events</i>	R25 implementation team with assistance from other key campus personnel as needed
<input type="checkbox"/>	10 Plan your event frameworks. Document reference: <i>Workbook 4: Preparing the Scheduling Environment</i>	Those members of the implementation team and others assigned to prepare R25 data
<input type="checkbox"/>	11 Enter your event frameworks in R25, including assigning appropriate reports to your event types and other data “properties” as appropriate. Document reference: <i>Workbook 4: Preparing the Scheduling Environment</i>	Those members of the implementation team and others assigned to prepare R25 data
<input type="checkbox"/>	12 Set data inheritance rules. Document reference: <i>Workbook 4: Preparing the Scheduling Environment</i>	Those members of the implementation team and others assigned to prepare R25 data.

Phase 5 - Preparing R25 Data, continued

Done ✓	Task	Responsible Party
<input type="checkbox"/>	13 Create cabinets, and set appropriate date/time constraints on each. Document reference: <i>Workbook 4: Preparing the Scheduling Environment</i>	Those members of the implementation team and others assigned to prepare R25 data.
<input type="checkbox"/>	14 Create folders in each cabinet, including associating event categories and organizations with each folder as appropriate. Document reference: <i>Workbook 4: Preparing the Scheduling Environment</i>	Those members of the implementation team and others assigned to prepare R25 data.
<input type="checkbox"/>	15 If needed, create custom event routing rules. Document reference: <i>Workbook 4: Preparing the Scheduling Environment</i>	Those members of the implementation team and others assigned to prepare R25 data.

Phase 6 - Preparing Additional Elements of the R25 Scheduling Environment

Done ✓	Task	Responsible Party
<input type="checkbox"/>	1 Attend R25 User training.	Key academic and non-academic schedulers
<input type="checkbox"/>	2 Define workflow. Document reference: <i>Security and Business Practices</i> and <i>User Guide</i>	Those members of the implementation team and others who attended R25 Data Preparation training
<input type="checkbox"/>	3 Prepare additional R25 data as needed to support your workflow and scheduling environment: pricing, assignment policies, notification policies. Document reference: <i>Security and Business Practices</i> and <i>Managing Event Pricing</i>	Those members of the implementation team and others assigned to prepare R25 data and your System Administrator
<input type="checkbox"/>	4 If you're using object security, set it up. Document reference: <i>Security and Business Practices</i>	System administrator, with assistance from other members of the implementation team
<input type="checkbox"/>	5 If you're creating your own SIS-R25 interface, do so now. Document reference: <i>Implementing and Using the SIS-R25 Interface</i> If you've purchased and installed a CollegeNET Interface, configure it now. Document reference: <i>The Interface supplement for your SIS</i> , and for reference information, <i>Implementing and Using the SIS-R25 Interface</i>	IT personnel and key academic schedulers familiar with your SIS
<input type="checkbox"/>	6 Install and configure the WebViewer. Document reference: <i>Installing and Customizing the R25 WebViewer</i>	System administrator and IT personnel

Phase 7 - Testing the R25 Environment and Training Users

Done ✓	Task	Responsible Party
<input type="checkbox"/>	<p>1 Test your SIS-R25 Interface.</p> <p>Document reference: If you've purchased an interface from CollegeNET, see the testing instructions in <i>the R25 Interface supplement for your SIS</i></p>	IT personnel and key academic schedulers familiar with your SIS
<input type="checkbox"/>	<p>2 If you've licensed Schedule25, do a test Schedule25 run.</p> <p>Document reference: <i>Automated Space Assignment Using Schedule25</i></p>	Key academic schedulers
<input type="checkbox"/>	<p>3 Test the entire academic event data flow from SIS to R25 to Schedule25 (if you've licensed it) and back.</p> <p>Document reference: <i>Implementing and Using the SIS-R25 Interface</i>, if you've purchased an interface from CollegeNET, <i>the R25 Interface supplement for your SIS</i>, and <i>Automated Space Assignment Using Schedule25</i></p>	IT personnel and key academic schedulers familiar with your SIS
<input type="checkbox"/>	<p>4 Create test events.</p> <p>Document reference: <i>User Guide</i></p>	Implementation team and academic and non-academic schedulers who attended the R25 User training.
<input type="checkbox"/>	<p>5 Test data and security.</p>	Implementation team and academic and non-academic schedulers who attended the R25 User training.
<input type="checkbox"/>	<p>6 Test reports.</p> <p>Document reference: <i>User Guide</i></p>	Implementation team and academic and non-academic schedulers who attended the R25 User training.
<input type="checkbox"/>	<p>7 Test workflow.</p> <p>Document reference: <i>User Guide</i></p>	Implementation team and academic and non-academic schedulers who attended the R25 User training
<input type="checkbox"/>	<p>8 Test the R25 WebViewer.</p> <p>Document reference: <i>Installing and Customizing the R25 WebViewer</i></p>	Implementation team and selected potential WebViewer users
<input type="checkbox"/>	<p>9 Train R25 users.</p>	Implementation team and academic and non-academic schedulers who attended the R25 User training

Phase 8 - Moving R25 Into Production

Done ✓	Task	Responsible Party
<input type="checkbox"/>	1 "Go live" with R25 and your SIS-R25 Interface.	Implementation team
<input type="checkbox"/>	2 "Go live" with the R25 WebViewer Note We recommend that you "go live" with the R25 WebViewer after you've been in production with R25 for awhile, and users are comfortable with the application, data, and business processes.	Implementation team

Phase 8 - Fine Tuning Your R25 Scheduling Environment

Done ✓	Task	Responsible Party
<input type="checkbox"/>	1 Fine tune data, security, and workflow as needed.	Those responsible for R25 data and system maintenance
<input type="checkbox"/>	2 Attend online R25 Continuing Education Courses.	R25 users
<input type="checkbox"/>	3 Train additional R25 users.	Implementation team and academic and non-academic schedulers who attended the R25 User training