# Project Description/Issue Statement (may include project triggers):

This project seeks to implement Microsoft Bookings as the online appointment scheduling tool for individuals and groups across campus, so that students and university constituents experience a uniform appointment booking experience and expenses can be reduced.

# Goals & Objectives:

## Strategic Goal(s) Supported

Retool our approach to university-stakeholder engagement. Integrate and simplify technology systems, data practices and policies to increase our organizational agility.

## Business Objectives

To save on duplication of staff time and expense for online appointment booking tool. To improve the customer’s (student or other constituent) experience for a consistent online booking interface. Initial project plan includes academic advising offices and a few campus partners, but will not be mandated across OSU. As interest increases, more access to Bookings may be provided.

## IT Objectives

## Implement Microsoft Bookings as a new UIT service offering. Provide the necessary support for a successful implementation.

# Project Governance

|  |  |  |
| --- | --- | --- |
| Role | Name/Org | Decision |
| Project Sponsor | Alix Gitelman, Andrea Ballinger | Financial Investment; OSU-wide business scope/standards; OSU-wide Prioritization |
| Project Manager | Melody Riley, Jenesis Long | Project tasks and timeline management |
| Steering Committee | IT reps  Customer reps | Overall project timeline and scope management; Communication Support |
| UIT Service Delivery | Shayne Huddleston  Erica Lomax  Andrew Wheeler | IT Resources / CN  IT Service Delivery Model |
| Other Key Stakeholders | Council of Head Advisors (CHA)  Academic Technology Committee  Advising Sounding Board  Other Early Adopters  Current scheduling tool admins | Feedback on timeline and project deliverables; user testing; identification of users |

# Project Scope:

|  |  |  |
| --- | --- | --- |
| Scope | In | Out |
| Functional | Online Booking; Real-time Automated scheduling; Calendar Management; Automatic Reminders; Customer Scheduling; Staff Scheduling; Ability to support local configuration without technical support; complies with FERPA & HIPAA requirements; Integration with Outlook. | Other Third-Party integration; Reporting; Salesforce Integration |
| Organizational | Any interested OSU employees with ONID accounts. IT staff and User training and support. Initial Focus: Advising Community and Other Interest Early Adopter (Professional Staff) | University partners, vendors, and students would not use this to create their own bookings pages.  Should not require OSU distributed IT to directly support.  This effort doesn’t assume all employees must use, examples of out of scope could include “faculty” but they could still use if interested. |
| System | Microsoft 365 suite of tools and licenses (A3); Active Directory; Grouper; Replace various online scheduling tools for individual and small group appointments. | Scheduling day/time/location of classes. Scheduling for inventory management purposes |
| *All other Scope* | Leverages Microsoft to provide training |  |

# Flexibility Matrix:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Least Flexible | Moderately Flexible | Most Flexible |
| Scope |  | X |  |
| Schedule |  | X |  |
| Resources | X |  |  |

# Key Project Deliverables

Service Catalog Work, documentation for IDSM experience; Training documents and gatherings to help implement MS Bookings (including KB articles and website). Appointment booking website design template. Setup within TeamDynamix for ongoing support.

# *Preliminary* Schedule and Milestones:

|  |  |
| --- | --- |
| Milestone | Date (mm/yy) |
| Charter/Scope defined and approved | 07/09/20 |
| Rollout plan and timeline established | 07/09/20 |
| User Base Confirmed | 07/09/20 |
| Licenses Activated | 07/15/20 |
| Design Templates Ready | 07/31/20 |
| Training and Support Materials Prepared | 07/31/20 |
| Training Completed | 09/18/20 |
|  |  |

# Staffing Estimates

|  |  |  |
| --- | --- | --- |
| Role | Effort | Name/Org |
| Jenesis Long |  | UIT CRM |
| Melody Riley |  | UIT CRM |
| Alex Aljets |  | UIT CRM |
| Shayne Huddleston |  | UIT Infrastructure |
| Albert Le |  | UIT Service Desk |
| Erica Lomax  Lucas Friedrichsen |  | UIT Identity & Access Mgmt |
| TimeTrade Administrators |  | Various College Departments |
| Salesforce Admin? |  | SF Shared Org Team |

# Service

|  |  |
| --- | --- |
| Item | Name/Org |
| Owner (when project completes) | Shayne Huddleston |

# Financial Estimate (opt.)

|  |  |
| --- | --- |
| Total Costs | Dollars |
| Initial Cost of Project |  |
| Ongoing Annual Cost | Included in MS 365 license and support |
| Total Benefits | Dollars |
| One-time Savings |  |
| Annual Savings | ~$42k in licensing |

## Funding Source

Initial Costs: n/a

Ongoing Costs: M365 paid for by E&G Funds

## Benefit Description (e.g. revenue increase)

Campus-wide cost savings of $42,000+ annually if/when other various online appointment booking tool contracts are terminated and replaced with MS Bookings. Support efficiency in staff appointment booking processes.

# Dependencies, Assumptions and Constraints

Interest and adoption rate will depend on marketing of availability for the new tool is widespread, if a mandate for using the tool is made, and if there is enough support to help all interested parties' transition to MS Bookings.

# Project Performance Measures (opt)

Adoption rate of MS Bookings, number of Service Desk inquiries, number of appointments booked in first year of use. Deprecation of other third-party online booking tools.

# Known Issues and Risks (of proposal)

Risks: Potential Change Fatigue among user base; Resource availability; COVID impacts; OSU departments preferring to stay on current tools or approaches.