

Minutes from ASM Constituent Group Meetings at EDUCAUSE 2001

Leaders: Eric Bird, Kevin Shalla

Approximately 25 people attended each of the following sessions.

Session #1: Selection / Implementation Issues

Vendor Selection

1. Do vendors lie concerning features?
2. One model of a good process
 - a. Determine high level requirements
 - b. Can vendor meet these?
 - c. Develop a common script for demonstration on each product.
 - d. The first three steps usually narrows field to one vendor.
 - e. Pay vendor to demonstrate how its product will work at your institution.
3. Another model of a good process
 - a. Eliminate in first round by price.
 - b. Define technical requirements, and compare to remaining vendors.
 - c. Selection team issues request for proposal (RFP).
 - d. Use process of elimination to reduce product field.
4. A consultant can help significantly in bargaining on price.
5. How to get users to settle on selection of systems. Can do fit-gap analysis. Ask vendor about best practices.

Implementation

1. Pricing is very important, as it can run several times the price of the software.
2. Be sure that consultants teach system, rather than setting it up, so that the staff learns. If a consultant doesn't already know the system, or won't teach it, reject that consultant. A consultant's job is to already be experts at the system, and teach staff to use it.
3. Vendor consulting may be less risky than third party, as they have more of a stake in success.
4. Training and communication are very important.
5. Include backfilling in the project budget, and hire shadows and train them BEFORE the project starts, so that main people can work on the project when it starts.

Session #2: Post-implementation Issues

Reporting

- Even after training, it's still too hard for most people to write good reports
- Try to deliver data over the web, with export into Excel (people are comfortable with Excel as a data management tool)

- How can you certify validity of user-written reports/queries? Data warehouses are often too complex for most people.
- OLAP appears to be more than most people need.
- Is security an issue? Should data be physically restricted on a need-to-know basis, or should you place responsibility on staff to use data appropriately? This varies by school culture—agreed that it's easier to support an open environment, so this should be encouraged.
- Atlantic Armstrong State University has a tool they're willing to share—they presented at a separate session.
- Goal is to find a single reporting solution: Crystal Enterprise, Business Objects, Brio...
- Best to use a data warehouse rather than production server for reliability; reporting / querying can be very processor-intensive.

Web Access / Portals

- Easier to add enhancements to web-based implementation
- Anyone using screen scraping for mainframe-based systems? (no)
- See presentation by Howard Strauss (Princeton) about web portals, very useful.
- Problem: how does your portal relate to the rest of your web site?
 - Do you (re)integrate all your other content?
 - Who manages the portal?
 - Who needs/uses the portal?
 - Integration between individual departments and central portal manager
 - Many portals lack content

Using Social Security Numbers

- Don't whenever possible; too easy to steal ID info.
- How do you protect your system from criminal investigation? (no one in the room had a scenario where ID theft had occurred by system break-in)
- Caution: don't request SSN over net—consider it just as confidential as course grade or other HR data.

Systems

- There was a brief general discussion of relative satisfaction with specific products.