



ICON Project Management
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ICON as a Service

In January, 2007, it is anticipated that legacy CMS licenses will have expired and will not be renewed. With legacy systems henceforth unavailable, ICON will move from the implementation phase to the service phase. This document describes the teams and efforts on the ICON Implementation Project and outlines how their roles and efforts will change in the service phase. Note: membership on all teams may shift during the transition to service phase.

ITS-Academic Technologies

Implementation Phase: As primary sponsor of the ICON Implementation Project, ITS-AT is the unit tasked with the daily management of ICON-related hardware, software, and administrative issues. ITS-AT is the contact with Desire2Learn, as well as working in partnership with other universities using Desire2Learn. ITS-AT provides consulting, support, training, and documentation for University of Iowa faculty and staff, and limited services for students. Other groups within ITS, such as SPA, Campus Services, at AIS, work with AT to provide some aspects of ICON support. ITS-AT also facilitates the ICON Core Team, Implementation Advisory Team, and Collegiate Administrators.

Service Phase: ITS-Academic Technologies' role will not change significantly, though the percentage of efforts may shift in response to changing demands. Functionally, the teams within AT will work somewhat differently. For example, instead of a weekly meeting of Team Leaders as has been the standard during the Implementation Project, there will be bi-weekly meetings on alternating weeks of the Administration and Training & Support teams. This reflects the shift in emphasis from implementing a new service to supporting an existing one.

E-Learning Core Team

Implementation Phase: This team is made up of a small number of interested parties from various units on campus outside ITS, though a representative from ITS-AT facilitates the Core Team's activities. The Core Team serves in an advisory capacity on many e-learning-related issues, including ICON. All major ICON-related decisions should be approved by them. See the ICON Administrative Conventions and Procedures Handbook for more details.

Service Phase: The Core Team should remain in place during the service phase. The role of the Core Team will be similar in the service phase, though their guidance may be

sought less frequently, since the system will be in a more stable state. Examples of times when the Core Team may be convened: major product upgrades, changes or additions to rights and roles, changes in policy, or other issues that benefit from a non-ITS perspective.

Implementation Advisory Team

Implementation Phase: This team is made up of representatives from every college at the university, as well as other units that have a presence in ICON. The team is facilitated by a representative from ITS-AT. The IAT serves in an advisory capacity and as a checkpoint to make sure the needs of all colleges are considered. Proposed changes to ICON are passed to the IAT for discussion as part of the decision-making flow outlined in the ICON Administrative Conventions and Procedures Handbook.

Service Phase: At the end of the Implementation phase, the Implementation Advisory Team should be reviewed and renamed the ICON Advisory Team. This is analogous to the shift in duties and membership that occurred when the CMS Selection Advisory Team disbanded and the Implementation Advisory Team was formed. Changes in the format of the IAT may include the formation of an executive team to share leadership and facilitation duties with Academic Technologies. Similar to the Core Team, the ICON Advisory Team's duties will be fewer than the Implementation Advisory Team's, since ICON is in a more stable state. The ICON Advisory Team may convene to collect input on features, upgrades, or product changes to ICON, or to check on the status of the colleges and units in relation to ICON.

ICON Collegiate Administrators

Implementation Phase: The role of Collegiate Administrators is to handle daily administrative duties (e.g., enrollment issues, test course site creation, user management) within the units they serve and to provide routine triage for users within their units. They also serve in an advisory capacity to Academic Technologies on ICON-related issues. This is somewhat different from the Implementation Advisory Team, as their primary role is administrative rather than advisory. However, given their close daily work with ICON, they often have valuable advisory input as well. There has historically been some overlap between the Collegiate Administrators and the IAT. The Collegiate Administrators have not been formally included in the communication chain as outlined in the Handbook for gathering advice on changes to ICON, though they are generally informed via email. Collegiate Administrators are expected to stay abreast of changes to the system and attend periodic check-in meetings and training sessions as necessary.

Service Phase: The role of the Collegiate Administrators should be formalized in the communication chain the Handbook. ITS-AT will perform an annual review of current Collegiate Administrators to ensure that the appropriate people still have the appropriate rights.

Other ITS Units

- SPA
- AIS
- Campus Services (including the Customer Information Desk and the Help Desk)
- TNS

Implementation Phase: ITS-Academic Technologies relies heavily on other ITS units for hardware and software support, information systems support, and end user support. During the implementation phase, AT developed communication strategies for after-hours emergency support, as well as disaster recovery strategies consistent with existing plans for WebCT and Blackboard. Training was provided to Help Desk staff, and an ICON Help Desk role was developed, though it was not widely used.

Service Phase: The role of certain ITS groups may be expanded. We will maintain and adjust communication and disaster recovery strategies with the appropriate units, as well as providing ongoing training for Help Desk staff. We will seek to adjust and support that role so it may be used by Help Desk staff.

Other Campus Units

- UI Libraries
- UI Colleges and Departments, including Deans and DEOs
- UIHC
- Division of Continuing Education
- Provost's Office
- Others?

Implementation Phase: Throughout the implementation, academic and non-academic units around campus have been important partners in developing strategies to support ICON use within their groups.

Service Phase: The role of these units will continue to be important during the service phase. ICON staff may contact representatives from the units for updates on how things are working in their courses, handling particular sites, and seeking opportunities for further collaborations.

ICON Teams within Academic Technologies

These teams were created to manage various aspects of the ICON implementation.

Integration

Implementation Phase: The Integration team works on all activities necessary to the design, implementation, testing, and maintenance of integrations between ICON and other campus systems and services and third-party vendors. This includes working with Desire2Learn on certain integrations as specified in the contract. During the implementation phase, the Integration team worked primarily on integrations that reduce

campus dependency on WebCT and Blackboard. Statements of Work (SOWs) will be requested from Desire2Learn when an integration requires for-pay work on their part.

Service Phase: All currently-existing integrations will move into maintenance phase, keeping up with version changes and other variables, both local and product-related. As new integrations are identified, the Integration team will follow the same process as in the implementation phase. During the service phase, the focus of the Integration team will shift to improving existing integrations and developing new ones. The Integration team will work with the Administration team to procure Statements of Work from Desire2Learn when appropriate.

Infrastructure

Implementation Phase: The Infrastructure team works on all activities necessary to select and maintain the server hardware, configure and maintain the databases, and coordinate with Desire2Learn technical staff for upgrades.

Service Phase: Currently-existing hardware and integrations will be maintained. The Infrastructure team will monitor ICON and product upgrades use to forecast needs for changes in hardware. The team will provide periodic reports on ICON use, both user-centric (e.g., number of logins in a time frame) and hardware-centric (e.g., disk usage, server load). The team will keep abreast of advances in technology and the campus environment that might affect local services, such as additional server and storage options. The team will stay in touch with Desire2Learn staff on the topics of software installation, upgrades, and maintenance. This team will merge with the Administration Team.

Course Migration

Implementation Phase: The Course Migration team works on all activities necessary to move course sites from legacy systems to ICON, or to retire them, as appropriate. Tasks include communicating with course site owners to determine their preferences, supporting course owners or college/departmental staff as they undertake their own migrations, and migrating legacy courses when the situation warrants it. The Course Migration team also identifies course sites with special needs (e.g., Online@Iowa, UIHC training sites) and works with those course owners to determine a migration strategy.

Service Phase: Ideally, the Course Migration team's charge would end upon the completion of the Implementation Phase; realistically, the team should remain in place for a limited time to handle exception cases, such as extended licenses of legacy systems, migration-related bugs that may occur in ICON course sites, and course owners who did not respond to communication attempts until after the end of the Implementation phase. This team can be merged into the Administration Team to handle these remaining migration tasks.

Training

Implementation Phase: The Training team works on all activities necessary to provide training and documentation to end users. Tasks include the development of

documentation modules in both online and printable form that cover the use of ICON tools as well as the use of integrations with local systems (e.g., uploading Evaluation and Examination Services data). The documentation is managed and updated through an online, permissions-based authoring system. The Training team also develops and executes training sessions in modular form; audiences may be general, department- or college-specific, or role-specific. This team works closely with the End User Support team.

Service Phase: The Training team will merge with the End User Support and Student Support teams. Training-related tasks will continue as in the implementation phase, such as maintaining documentation and keeping abreast of product changes. Training sessions will continue to be advertised and provided, both regularly-scheduled and by request.

End User Support

Implementation Phase: The End User Support team works on all activities necessary to ensure that support resources exist and are available to end users (students, faculty, staff). This includes developing online, interactive training modules (e.g., Flash-based); providing training and resources for the Help Desk as necessary; providing phone, email, and face-to-face support to course owners; participating in user groups and other support communities; and working with colleges and other units to determine their specific needs (e.g., branding, specific tool training). This team works closely with the Training and Student Support teams.

Service Phase: The End User Support team will merge with the Training and Student Support teams. Support tasks will continue as in the implementation phase, as well as participating in Desire2Learn-related user groups and support communities. This team will include AT-based SITAs and representatives from the ITS Help Desk, including student staff.

Student Support

Implementation Phase: This team works on all activities necessary to develop and maintain task-based instructions for the most frequently used course tools in ICON. The primary task of this team is the development and maintenance of the Online@Iowa course, though the Flash-based module may be used outside the Online@Iowa context

Service Phase: The Student Support team will merge with the End User Support and Training team. The Online@Iowa course will migrate from WebCT to ICON and continue to be modified as necessary. This team, by sharing membership in the End User Support and Training team with Help Desk staff, will work to ensure student access to and support of ICON.

Policies and Procedures

Implementation Phase: The Policies and Procedures team works on all activities necessary to draft policy documents and recommend procedures for administrative activities related to the use, support, and maintenance of ICON. The primary result is th

ICON Administrative Conventions and Procedures handbook, available publicly from the ICON website. The Policies and Procedures team works with the Core Team and IAT in crafting recommended procedures and publicizing them. At the end of the implementation phase, the ICON Administrative Conventions and Procedures Handbook will undergo a project-end review.

Service Phase: The Policies and Procedures team will merge with the Administration team. Convention- and procedure-related tasks will continue as during the Implementation phase, updating the Handbook when necessary, following the procedures outline in the Handbook. Possible change triggers include but are not limited to changes in the product that have implications on use, changes to state or federal law, and changes to university policy.

Organizational Architecture

Implementation Phase: The Organizational Architecture team works on all activities necessary to research, develop, and maintain an organizational architecture for ICON that meets the needs of the campus while allowing for future growth.

Service Phase: The Organizational Architecture team will merge with the Administration team. Members will remain in communication with other campus stakeholders and remain abreast of changes to related systems, such as a new SIS, as changes to the SIS will have an impact on course and department numbering systems. The existing organizational architecture will be maintained and modified as necessary.

Communications

Implementation Phase: The Communication team works on all activities related to promoting and communicating about ICON around campus and beyond. Tasks include participating in consortia and such as MSDL and LISA-B, planning and hosting promotional events such as ICON Day, and developing and maintaining the ICON website. The Communication team maintains ties with representatives from the Colleges and other units, such as the Office of the Provost, the Center for Teaching, and peer institutions.

Service Phase: The Communication team will continue with initiatives begun in the implementation phase, as well as spearheading new initiatives as appropriate. A suggested change is to send a liaison from the ICON Communication Team to the AT Communication Team.

New Team: Administration

Implementation Phase: Administrative duties had previously been handled by various teams, such as Integration, Migration, Policies and Procedures, and Organizational Architecture.

Service Phase: By merging several existing teams and formalizing the administration associated with ICON, staff will develop a clearer task set and distribution of duties. Tasks include but are not limited to the creation and maintenance of roles, as necessary;

management, training, and communication with Collegiate Administrators; providing administrative support to course owners on issues such as course site creation, mapping of discussion sections, enrollment issues; and department- and college-specific issues such as branding and shared discussions. The Administration team will also manage the University of Iowa's overall business relationship with Desire2Learn. The Administration team will meet biweekly or more often as necessary.

New Team: End User Support and Training

Implementation Phase: This new conglomerated team is made up of the End User Support, Training, and Student Support teams from the Implementation Phase. These teams all had similar charges, of providing training, support, and documentation of various types for different audiences around campus. See individual team descriptions for more detail.

Service Phase: Merging these related teams will improve communication among members, and regular meetings will ensure that all members have the most up-to-date information at their disposal. Regular meetings will also help to schedule training sessions, share bug reports, and engage in solutions sharing.