



DRAFT - Blackboard Vista Release 4 Upgrade - DRAFT CSU Major Project Scope Document

Project Organization	
Project Name: Blackboard Vista Release 4 Upgrade	Project Number: 07-0021
Prepared by: Anna M. Prusak	Date: May 14, 2007
Business Sponsor: Dr. Robert Aebersold	Business Area: SO Academic Affairs
Business Sponsor: Dr. Anne Agee	Business Area: SO ITS
Executive Sponsor: Dr. David Carter	Business Area: COP
CCSU Business Lead: Lisa Washko	Business Area: CCSU ITS
ECSU Business Lead: David Oyanadel	Business Area: ECSU ITS
SCSU Business Lead: Stan Walonoski	Business Area: SCSU ITS
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Technical Lead: Scott Zak	Business Area: SO ITS
Project Manager: Anna M. Prusak	Business Area: SO ITS
Program Manager: Debbie Romano-Connors	Business Area: SO ITS Management
Project Description	
As described in the Project Charter	<p>Blackboard Vista is an Enterprise Course Management System. Originally developed by WebCT; in 2006, it was acquired by Blackboard, Inc. Periodically, as part of the Vista maintenance cycle, Blackboard provides new software releases to provide new functionality and fixes to existing defects.</p> <p>At CSUS, Blackboard Vista is a single installation with distributed institutional administration. Integration of universities' Student Information System (Banner) data with Vista is performed via:</p> <ul style="list-style-type: none"> • file transfers of data extracts • real-time event queues managed under Luminis Message Broker (LMB) <p>The current production version is Blackboard Enterprise Vista License 3.0 with Service Pack 7 (Vista 3.0.7).</p> <p>CSUS Blackboard Vista environment comprises of:</p> <ul style="list-style-type: none"> • a test system – to allow operational staff to test patches prior to rolling them out to the production system • a production system – to conduct CSU e-learning <p>CSUS upgrade of Blackboard Vista from version 3.0.7 to Release 4 was unanimously approved by the CSUS's eLearning Leadership Team (eLT) on February 14, 2007. <u>On April 20, 2007, the Council Of Presidents (COP) approved the project's high level timeframe recommended by eLT.</u></p> <p>Due to underlying technical differences between Vista 3.0 and Release 4, Blackboard Inc. recommends treating Vista Release 4 as a new install rather than an upgrade from 3.0.7.</p> <p>NOTE: Where the Blackboard Vista Release 4 is referenced without regard to the Application Pack, this document will refer to it as "Vista 4.x."</p>

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Project Justification	
As described in the Project Charter	<p>There are two primary drivers for the Vista upgrade:</p> <ol style="list-style-type: none"> 1. Maintenance of Blackboard's top level support 2. New features, enhancements and bug fixes <p>Vista 3.0 is scheduled to come out of Blackboard's top level support by 12/31/2007. This means, that as of January 1, 2008, Blackboard will:</p> <ol style="list-style-type: none"> 1. No longer provide security updates for it 2. No longer provide patches for it 3. Reduce its support level to a minimum <p>The primary features of the new version are:</p> <ol style="list-style-type: none"> 1. User Interface Enhancements <ul style="list-style-type: none"> ➤ Enhanced user interface navigation requiring less time and fewer clicks to accomplish key tasks ➤ Built-in interactive tutorials, markers and pointers 2. Enhanced teaching and learning tools <ul style="list-style-type: none"> ➤ New Quick Start page for Course Set-up ➤ New Course Preview Area ➤ More Flexible Web Links ➤ Additional Learning Module Options ➤ New Assessment Presentation Choices ➤ New Group e-Mail Options ➤ Enhanced "My Grades" Area ➤ Easier Course Customization ➤ New "Web Folder" Functionality ➤ More Flexible e-Pack Adoption for Faculty ➤ 15-Day Trial e-Pack Access for Students 3. Enhanced administrative processes <ul style="list-style-type: none"> ➤ Faculty Tools for Course content Upgrade ➤ New Administrative Options for File Management ➤ Improved Backup and Restore ➤ Improved End-of-Term Processing ➤ Retain Gradebook Data for Un-enrolled Users <p>Enhanced Community Manager allowing institutions more flexibility in configuring Vista to match their unique organizational structures.</p>
Project Objectives:	<ol style="list-style-type: none"> 1. Upgrade CSUS Blackboard Vista to Release 4 for the Spring/08 academic semester. 2. Provide a Blackboard Vista Release 4 pilot during the Winter Intersession 2008 academic semester. 3. Provide Oracle 10G for the Blackboard Vista database. 4. Provide Blackboard Vista Release 4 Administration Training to CSUS Blackboard Vista Administrators. 5. Migrate CSUS Blackboard Vista 3.0.7 content to Blackboard Vista Release 4. 6. Develop/update CSUS Blackboard Vista Release 4 training materials. 7. Develop/update CSUS Blackboard Vista Release 4 helpdesk procedures. 8. Train CSUS faculty in Blackboard Vista Release 4 features.
Project Stakeholders:	<p>Students, Faculty, Faculty Senate or University Senate, Chairs, Deans, AAUP, Instructional Designers, Blackboard Vista Administrators, Database Administrators, Network & Security Administrators, Council of Information Technology (CIT), Vice-Chancellor & Vice-Presidents of Academic Affairs (COVPAA), University Presidents, E-Learning Leadership Team (eLT), University Finance & Administration, Board Of Trustees & Chancellor, State of Connecticut, CTDLC Help Desk, Blackboard, Inc.</p>



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Functional Assumptions:

1. Assuming Blackboard releases Vista 4.2 on time; CSUS Blackboard Vista will be upgraded to that version. In the absence of Vista 4.2 version, the project will progress with the use of Vista 4.1.
2. CSUS will not be a Blackboard Vista Release 4 Beta site.
3. All Blackboard Vista Service Packs becoming available for General Availability will be applied to the Vista Release 4 Development (DEV), Test (TEST) and Production (PROD) systems.
4. There are no significant user interface changes between Blackboard Vista versions 4.1 and 4.2.
5. Any tests performed on Blackboard Vista 4.1 will be re-done on Vista 4.2 once that version becomes available and is installed at CSUS.
6. The DEV system will be discontinued upon the PROD system being available and the migration of Blackboard Vista Release 3 to 4 being complete.
7. Migration of Blackboard Vista Release 3 to 4 will entail:
 - Manual migration of:
 - Institutional Configuration (ex. Branding, [Powerlinks](#))
 - System Integration (SI) Migration of:
 - Users (SourcedID, Username, Account)
 - Sections
 - Membership (Users, Sections, Roles)
 - Learning Context Hierarchy (LCH)
 - Archive migration of:
 - Section Content
 - Section Data
8. Blackboard Vista user information will first be migrated from Release 3 to 4 and, later, imported from Banner for any last minute adjustments.
9. Blackboard Inc. plans to release a migration tool for assisting in migration from Release 3 to 4. Once the tool becomes available, it will be evaluated for its use by CSUS.
10. Integration testing will require:
 - [University test files from Banner. Note: the SO will evaluate files from the last round of Luminis integration testing for a potential use by this project.](#)
 - [University test events from Luminis including:](#)
 - Create Course Event
 - Create Section Event
 - Create User Event
 - Assign Faculty Event
 - Enroll Student Event
 - [Create Group](#)
11. [The System Office Consolidated Data Store \(CDST\)](#) will be evaluated for Blackboard Vista Release 4 impact and, if necessary, adjusted accordingly. All pertinent existing reports will be tested and/or certified for the Blackboard Vista Release 4 readiness.
12. [To avoid unnecessary procurement and project delays, the project will utilize VMWare for the Blackboard Vista Release 4 development server.](#)
13. The upgrade requires no new networking equipment.
14. Blackboard Vista Release 4 DEV, TEST and PROD systems will be recoverable to previous night.
15. The Blackboard Vista Release 4 TEST and PROD systems will be configured at CCSU.
16. [If the CSUS Winter Intersession 2008 semester takes place in two Blackboard Vista environments \(3.0.7 and 4.x\), it will be supported](#) with relaxed Service Level Requirements.
18. [The Winter Intersession 2008 pilot will require a new URL. This will require acquiring an](#)

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	<p>set up of a <u>new</u> SSL certification. Because of the new URL, participating Vista community will need to be instructed to point their bookmarks and favorites to the new location. Similarly, help desk will need to be instructed accordingly.</p>	
Constraints:	<ol style="list-style-type: none"> 1. <u>It remains to be determined whether Blackboard Inc. will release Vista 4.2 on time, i.e. by late Spring 2007.</u> 2. <u>The number of faculty requiring Blackboard Vista Release 4 training for Winter Intersession 2008 and Spring 2008 semesters, as well as, the number of required support staff and training offerings remains to be determined.</u> 	<p>Formatted: Complex Script Font: 9 pt</p> <p>Formatted: Bullets and Numbering</p>
Exclusions:	<ol style="list-style-type: none"> 1. <u>No new Oracle 10G features will be available at Blackboard Vista 4.x go-live. The new features will be selectively turned on once Vista 4.x stabilizes.</u> 2. <u>Arrangements for new provisions for the expiring CSUS Help Desk agreement with CTDL are not within the scope of this project.</u> 3. <u>Blackboard Vista 3.0.7 <u>templates and</u> tracking data will not be migrated to Blackboard Vista Release 4.</u> 4. <u>Thomson powerlinks and ePortfolio will not be available on the DEV system.</u> 	<p>Formatted: Complex Script Font: 9 pt</p> <p>Formatted: Bullets and Numbering</p> <p>Deleted: ¶ 'Create group' Luminis events are very rare and will not be tested as part of the upgrade.</p>
Project Deliverables:	<ol style="list-style-type: none"> 1. Project Charter Document 2. Project Scope Document 3. Issues Log 4. Risk Log 5. Project Schedule 6. Server Migration Plan 7. Blackboard Vista Release 3 to 4 Migration Scope 8. Blackboard Vista Release 3 to 4 Migration Plan 9. Blackboard Vista Release 4 configuration 10. Test Plans and Results for: <ul style="list-style-type: none"> ➤ Vista GUI and Tools ➤ Vista Chat and Whiteboard ➤ <u>Branding and Login Pages</u> ➤ Integration with Luminis ➤ Integration with SSO at CCSU ➤ Integration with LDAP ➤ Data Managements Scripts for Archives ➤ Data Management Scripts for Imports ➤ <u>Post Migration, Section Integrity Verification</u> ➤ Blackboard Vista CDST Reports ➤ Database recovery from scratch (assumes Blackboard Vista recovery on a brand new server). ➤ Manual Blackboard Vista database failover to a standby server 11. Blackboard Vista Release 4 Certified CDST Tables. 12. Revised CSUS Blackboard Vista Operational SLAs 13. Service Monitoring, as per revised Operational SLAs, for: <ul style="list-style-type: none"> ➤ Critical Hardware ➤ Server Availability ➤ HTTP Services ➤ Weblogic ➤ Java Virtual Machine (JVM) in Weblogic ➤ Database in Weblogic ➤ Blackboard Vista Database 14. Updated Blackboard Vista 4.x Training Materials 15. Updated Blackboard Vista 4.x Helpdesk Procedures 16. Faculty training sessions at each of the CSUS Universities. 17. Blackboard Vista Health Check 18. <u>Blackboard Vista Release 4 Administration Training for CSUS Blackboard Vista Administrators.</u> 19. <u>Lessons Learned</u> 	<p>Formatted: Complex Script Font: 9 pt</p> <p>Formatted: Complex Script Font: 9 pt</p> <p>Deleted: .</p> <p>Formatted: Bullets and Numbering</p> <p>Formatted: Bullets and Numbering</p> <p>Formatted: Indent: Hanging: 42 pt, Numbered + Level: 1 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 27.6 pt + Tab after: 45.6 pt + Indent at: 45.6 pt, Tabs: 21.6 pt, List tab + Not at 45.6 pt</p> <p>Deleted: ¶</p> <p>Formatted: Bullets and Numbering</p> <p>Deleted: ¶</p> <p>Formatted: None, Indent: Before: 3.6 pt, Space Before: 0 pt, After: 0 pt, Numbered + Level: 1 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 27.6 pt + Tab after: 45.6 pt + Indent at: 45.6 pt, Adjust space between Latin and Asian text, Adjust space between Asian text and numbers, Tabs: 21.6 pt, List tab + Not at 45.6 pt</p> <p>Formatted: Bullets and Numbering</p>
➤ Issues:	<ol style="list-style-type: none"> 1. Details of the Winter Intersession 2008 pilot remain to be determined by eLT. 	<p>Formatted: Font: (Default) Arial, Complex Script Font: Arial, 9 pt</p>



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	<ol style="list-style-type: none"> 2. Blackboard Vista 4.1 introduces a new LCH context: Division. It remains to be determined how Division will be reflected for each CSUS university in the migration. 3. Blackboard Vista 4.2 introduces a new LCH context: Term. If version 4.2 is released in a timely manner, it will remain to be determined how Term will be reflected for each CSUS university in the migration and whether it will result in the protocol for naming sections. 4. It remains to be determined whether special arrangements need to be made for faculty desiring to tweak their Fall 2007 content for use in Spring 2008 or Winter Intersession 2008 sections. 5. The impact of training faculty in Blackboard Vista 4.1 while, potentially, implementing Vista 4.2 for production use - remains to be determined. 6. SSO is affected by Blackboard Vista Release 3 to 4 migration. It remains to be determined whether the issue will be addressed by adjustments to the existing form based authentication or via Vista auto-login. 7. SSO is currently in use only at CCSU. While adoption of the feature by other universities not within the scope of the project, should it happen under the operational Blackboard Vista 3.0.7 support, it will need to be verified by the adopting university under Blackboard Vista Release 4. 8. Branding for Login Pages is a currently identified Blackboard Vista Release 4 issue (ID=CR115710). It is expected that in case Vista does not resolve the problem, a workaround will need to be identified and implemented. 9. Known Blackboard Vista Release 4 issues. 10. New Blackboard Vista Release 4 settings remain to be identified and agreed upon. 11. SLAs for Blackboard Vista Release 4 remain to be reviewed, and if needed, revised. 12. SCSU will upgrade to Luminis 4.0 in August 2007. It remains to be determined whether, under the new version, the XML Event Definition Level has changed. 13. Current CSUS Help Desk agreement with CTDLC expires 12/31/07. 	<p>Deleted: Release</p> <p>Formatted: Indent: Before: 3.6 pt, Numbered + Level: 2 + Numbering Style: 1, 2, 3, ... + Start at: 1 + Alignment: Left + Aligned at: 54 pt + Tab after: 72 pt + Indent at: 72 pt, Tabs: 21.6 pt, List tab + Not at 72 pt</p> <p>Deleted: <#>It remains to be determined whether there is a need to migrate templates from Blackboard Vista Release 3 to 4.</p> <p>Formatted: Bullets and Numbering</p> <p>Deleted: use</p> <p>Formatted: Bullets and Numbering</p> <p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Deleted: ¶</p> <p>Formatted: Font: (Default) Arial, 9 pt, Font color: Auto, Complex Script Font: Arial, 9 pt, Bold, Italic</p> <p>Formatted ... [1]</p> <p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Formatted ... [2]</p> <p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Formatted: Bullets and Numbering</p> <p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Deleted: .x</p>
<p>➤ Risks:</p>	<ol style="list-style-type: none"> 1. Blackboard Vista Release 4 is the first Vista upgrade for CSUS; the process for performing Vista upgrades does not yet exist. In addition, due to underlying technical differences between Vista Releases 3 and 4, Blackboard Inc. recommends treating Vista Release 4 as a new install rather than an upgrade from Release 3. 2. Each CSUS University's LDAP implementation is unique. 3. Unknown Blackboard Vista Release 4 issues. 4. Unanticipated procurement delays. 5. It remains to be determined at what point CSUS would forgo Blackboard Vista 4.2 version should Blackboard delay its release. 6. Unknown Blackboard Vista 4.2 new settings and features and their impact on CSUS. 7. Unidentified project Change Control Board. 	<p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Formatted ... [2]</p> <p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Formatted: Bullets and Numbering</p> <p>Formatted: Font: (Default) Arial, 9 pt, Complex Script Font: Arial, 9 pt</p> <p>Deleted: .x</p>
<p>Change Management:</p>	<p>Change Management will follow the defined PMO change management procedure. Please see the project at the CSU PMO website. www.ct.edu/pmo</p>	<p>Formatted: Complex Script Font: 9 pt</p>
Scheduling		<p>Formatted: Bullets and Numbering</p>
<p>Projected Start Date: April 2, 2007</p>	<p style="text-align: center;">▲</p>	<p>Formatted: Complex Script Font: 9 pt</p>
<p>Projected Completion Date: January 31, 2008</p>	<p style="text-align: center;">▲</p>	<p>Formatted: Complex Script Font: 9 pt</p>
Costs		<p>Formatted: Complex Script Font: 9 pt</p>
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<p>See Project Cost Estimate Worksheet:</p>		<p>Formatted: Complex Script Font: 9 pt</p>



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Approvals			
Approval:	Project Manager: Anna M. Prusak	Date:	Formatted: Complex Script Font: 9 pt
	Program Manager: Debbie Romano-Connors	Date:	Formatted: Complex Script Font: 9 pt
	Business Sponsor: Dr. Robert Aebersold	Date:	Formatted: Complex Script Font: 9 pt
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