

## IDTS Project Design and Architecture - Overview

Sub-Project	CCWD IDTS		Total w/OPE	OUS & ODE IDTS						No OPE Vendor	Total w/OPE
	CCWD	CC In-kind		CC	HS	CCWD -IR	OSU	OUS	OUS-IR		
HS Transcript Database				\$66,334	\$0	\$3,165	\$108,909	\$28,872	\$2,175	\$780	\$210,235
Performance Feedback				\$66,500	\$39,900	\$66,500	\$161,652	\$33,250	\$166,250	\$0	\$534,052
SIS Package Extract	\$520,800		\$520,800		\$67,404		\$27,065			\$101,003	\$195,472
Sites to clone	\$19,950		\$19,950		\$178,304		\$66,929			\$39,171	\$284,404
Training on Extract Use		\$8,500	\$8,500		\$19,322		\$38,053			\$0	\$57,375
HS's with OUS authentication					\$13,300		\$39,721			\$40,000	\$93,021
HS's with SIS Pkg authentication					\$19,950		\$16,730			\$60,000	\$96,680
HS's on Excel-Web					\$13,300		\$50,091			\$40,000	\$103,391
Web File Upload					\$7,685		\$388,288			\$0	\$395,973
OUS Server S/W					\$3,406		\$36,079			\$139	\$39,625
Project Evaluation	\$11,650		\$11,650	\$19,950	\$53,200		\$39,134	\$13,300		\$110,000	\$235,584
General Project Oversight	\$100,000		\$100,000				\$135,437				\$135,437
<b>Sub Totals</b>	<b>\$652,400</b>	<b>\$8,500</b>	<b>\$660,900</b>	<b>\$152,784</b>	<b>\$415,772</b>	<b>\$69,665</b>	<b>\$1,108,089</b>	<b>\$75,422</b>	<b>\$168,425</b>	<b>\$391,093</b>	<b>\$2,381,248</b>
Application Infrastructure		\$200,500	\$200,500								
Staff Travel	\$12,000		\$12,000								
<b>GRAND TOTAL</b>	<b>\$664,400</b>	<b>\$209,000</b>	<b>\$873,400</b>								<b>\$2,381,248</b>

### Funding

Project Total	Legislative OUS Allocation	Legislative ODE Allocation	Legislative CCWD Allocation	Community College In-Kind
\$3,254,650	2,081,250	\$300,000	\$664,400	\$209,000

# Table of Contents

<b>Section</b>	<b>Page</b>
High School Transcript Database	3
Research and Data Usage	4
High School Student Information System (SIS) Extract	5
Cloning High School SIS Extracts	6
ESD Training on Extract Use	7
Roll Out to High Schools	8
Develop Excel File Web Upload	9
Develop OUS Server Software	10
Project Evaluation	11
Project Oversight	11
Application Infrastructure	12
Staff Travel	12

# HS Transcript Database

**Description**

Each OUS and CCWD campus will need to be able to:

- Receive HS transcripts via EDI
- Process them
- Save them as appropriate.

This section of the plan addresses these needs.

First we collaboratively plan with the campuses that will be implementing the HS Transcript Database. Campus representation on the design team and on the steering committee that approves designs must be selected.

After the working relationship has been established, design, approval and development (including documentation and testing) of modules providing the overall desired functionality described above will make up the bulk of this section of the plan.

Note: Implementation will be done by each OUS campus with minimal involvement by project staff, similar to the way Banner baseline is handled. At CCWD campuses, especially the smaller ones, project staff may need to provide more assistance.

CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	Total
\$66,334	\$0	\$3,165	\$108,909	\$28,872	\$2,175	\$780	\$210,235

Modules envisioned are listed in the work-break-down structure below.

**Establish Campus Representatives  
Design Overall HS Transcript Database**

**"EDI (TS130, TS131)"**

- Estab Rqmts
- Develop XML Module (shared)
- Develop Driver w. Interfaces
- Unit Test
- Document
- Campus Makes Mods
- Implement

**Archive/Purge**

- Estab Rqmts
- Develop (non-PL/SQL)
- Unit Test
- Document
- Campus Makes Mods
- Implement

**OUS-IR/CCWD-IR Extract**

- Estab Rqmts
- Develop (Non-PL/SQL)
- Unit Test
- Document
- Campus Makes Mods
- Implement

**BI Model? Std Rpts?**

- Estab Rqmts
- Develop
- Develop Std Queries/Rpts
- Unit Test
- Document
- Campus Makes Mods
- Access or BI License for CC's?
- Acces/BI-Training (User)
- Implement

**Load Banner form SOAHSCH via API if Possible**

- Develop Prototype Report
- Estab Rqmts
- Develop
- Unit Test
- Document
- Campus Makes Mods
- Implement

# Research and Data Usage

## Description

Cross sector partners from OUS, CCWD, and K-12 will collaborate to create a long term research agenda for the use of data to be provided through the IDTS. Admissions, advisors, counselors, faculty and high school administrators and teachers will need to meet to identify systemic needs, short and long term, as well as the most appropriate uses of the data provided by this system to inform Joint Boards of Education policy work. The resulting research agenda connects OUS and CCWD to the ODE planned KIDS project that is planned to continue into the next biennium.

At its completion, the project will use recommendations for enhancement of current reporting practices to provide some additional information for program improvement. Questions about how this can be done while complying with the Family Educational Rights and Privacy Act need to be resolved as the first step.

This section of the plan covers the work required for OUS institutional research and CCWD institutional research to facilitate a long-term research agenda, produce data usage recommendations, and provide enhanced feedback on student performance.

CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	Total
\$66,500	\$39,900	\$66,500	\$161,652	\$33,250	\$166,250	\$0	\$534,052

Major tasks envisioned are listed in the work-break-down structure below:

- Resolve FERPA Legal Questions
- Convene research design team(s)
- Produce a research framework
- Propose "best use" data recommendations for Joint Boards
- Define feedback requirements
- Design initial feedback reports and mechanisms
- Code and Test reports
- Train high school staff working on improving programs

# HS SIS Package Extracts

**Description**

Software development teams, primarily HS staff (IT and functional) will be formed with the understanding that they will assist with cloning their extract at other sites that use the same SIS package. We expect to do this for as many as 5 of Oregon's most popular student information systems (SIS). Successful collaboration with these teams and the schools that use these packages is expected to give over 80% of Oregon's high school students the ability to transfer their transcripts electronically.

Software development teams, primarily community college staff (IT and functional) will be formed with the understanding they will assist with cloning their extract at other sites that use the same SIS package. We expect to do this for the 12 remaining community colleges. Successful collaboration with these teams and schools is expected to give each community college student with in an existing community college student information system the ability to transfer their transcripts electronically.

The bulk of the work in this section is associated with developing (code, test and document) computer and manual processes that allow only authorized users to extract and securely deliver transcripts in the specified OSR format to an OUS server [which converts the data into EDI format and transmits it to the specified Oregon post-secondary school(s)]

CCWD Total	CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	OUS & ODE Total
\$520,800		\$67,404		\$27,065			\$101,003	\$195,472

Major tasks envisioned are listed in the work-break-down structure below:

- Establish the package development team
- Team Orientation and Extract Design
- Code Extract
- Integrate MIM
- Unit Test
- Certify
- Document for Cloners
- Document for Users
- Handoff to Support Team
- Document for Trainers

# Cloning HS SIS Package Extracts

**Description**

Once we have developed a good extract, we plan to make minor modifications (clone it) so it may be used at other high schools and community colleges using that particular SIS package. Hopefully only minor modifications will be required. We'll make distinct clones for each "site" that uses transcript-print software that is different from any other ESD, high school, or community colleges.

**Expected Implementation Steps:**

Each site at which we clone, will manually enter the certification suite of about 20 test transcripts into their test system – as if these test students were transferring into their district.

Next, the site schedules the cloning swat team for that package to help them clone and "tune" their extract routines until test transcripts are being properly prepared.

The first site to be implemented for each package, will take more time. Implementation documentation will typically need to be revised and clarified for each site to reflect changes made.

CCWD Total	CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	OUS & ODE Total
\$19,950		\$178,304		\$66,929			\$39,171	\$284,404

**Major tasks envisioned are listed in the work-break-down structure below:**

- Establish the clone development team
- Team Orientation and Extract Design (esp. MIM integration and authentication)
- Code
- Unit Test
- Certify
- Update Document for Cloners
- Update Document for Users
- Update Documents for Trainers
- MIM Integration Support

# Training on Extract Use

## Description

Before a high school can actually send electronic transcripts, as requested by students, administrative procedures need to be updated and counselors trained on when traditional paper transcripts will be appropriate and on the proper way to exercise this new capability, (reviews, approvals, etc.)

This part of the project is carried out mostly by the ESD's, working with each school's administrators and counselors, to make a smooth transition to electronic transcripts. It includes:

- Work with high school administrators to establish "use policies and procedures"
- Train counselors how to transfer transcripts
- And, if the new electronic transcript functionality isn't protected by the SIS package's user-authentication, we'll set each counselor up as an authorized user of the OUS EDI process. (Only authorized users can send transcripts)

Community colleges will follow the same process as the high schools to develop receive and send capability and usage.

CC In-Kind	CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	OUS & ODE Total
\$8,500		\$19,322		\$38,053				\$57,375

Major tasks envisioned are listed in the work-break-down structure below:

Prep for meeting w ESD  
 Meet w Administration  
 Train Trainer  
 Fine Tune Training Materials

## Roll-Out to High Schools

### Description

This part of the project will vary from school to school depending on whether the new electronic transcript capability is protected by the school's SIS package's user-authentication or not and on whether the school is using a package to which we've added the electronic transcript capability or not. Specifically:

- For schools not using a package to which we've added the electronic transcript capability, we'll train them on the use of the Excel-File Web-Upload process and set the counselors up with accounts and passwords.
- For schools using a package to which we've added the electronic transcript capability, but in such a way that user-authentication protection is inadequate, we'll need to train them on the use of the Web-Upload process and set the counselors up with accounts and passwords.
- For schools using a package to which we've added the electronic transcript capability, but in such a way that user-authentication protection is provided by the SIS package, we'll train them on the use of the process.

Type of School	CC	HS	CCWD -IR	OSU	OUS	OUS -IR	Vendor	Total
With OUS Authentication		\$13,300		\$39,721			\$40,000	\$93,021
With SIS Package Authentication		\$19,950		\$16,730			\$60,000	\$96,680
Using Excel-File Web-Upload		\$13,300		\$50,091			\$40,000	\$103,391
Sub-Totals		\$ 46,550		\$106,542			\$140,000	\$293,092

**Major tasks envisioned are listed in the work-break-down structure below:**

Project staff

- Answer questions via phone and email
- Use software to set up new login accounts and passwords for counselors (not needed for users of packages with user-authentication protecting the electronic transcript capability)

System Administrator

- Set up server to accept data from new nodes (high schools, school districts and ESD's)

ESD Trainer/Support (may need to have a contractor do this sometimes)

- Interact with high school Administrators and counselors

# Develop Excel File Web-Upload

## Description

Development begins after rollout to schools using the top 5 packages and Mastery-In-Motion nears successful completion. And, instead of an ESD trainer visiting each school, rollout will be accomplished via web-based documentation covering:

1. Implementation steps
2. Steps for gaining authorization to provide official transcripts
3. Use of the spreadsheet and web site software

Each transcript will be processed separately at the web site. An authorized user must acknowledge they've reviewed the web-displayed transcript before it can be sent on (like reviewing a hand typed official transcript before mailing it). This will be our only certification process for web transcripts.

CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	Total
	\$7,685		\$388,288				\$395,973

Major tasks envisioned are listed in the work-break-down structure below:

- Develop Excel Template XML
- Prototype Web Upload
- Modify OUS server software to Accept XML
- Certify OUS server software
- Test at Wilsonville (large SchoolMaster site)
- Production Web File Upload
  - Revise and Test
    - Comply with OSU & Disability Web Standards
- Prepare Detailed User Documentation for Web and test it

## Develop OUS Server Software

### Description

On the OUS server, a process translates Oregon Student Record (OSR) format transcripts, sent electronically by high schools, into EDI transcripts and transmits them to Oregon's post-secondary schools.

CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	Total
	\$3,406		\$36,079			\$139	\$39,625

Major tasks envisioned are listed in the work-break-down structure below:

- Automate OUS S/W
  - Tracking Log
  - Error Log
  - Prototype Web access to logs
  - Acknowledgement
  - Create Certification Transcripts
  - Create Certification Compare process
- Finish Testing data from eSIS
- Test data from SIS Pkg 2
- Test data from SIS Pkg 3
- Test data from SIS Pkg 4
- Add capability to pass along CIM/CAM/PASS via EDI transcript
- Test Mastery-IM
- Productionize Web access to logs

## Project Evaluation

### Description

Toward the end of the project, a report will be prepared on how well the project met its objectives and performance measures. This may include a survey of expected beneficiaries and may be done by a vendor.

CCWD Total	CC	HS	CCWD-IR	OSU	OUS	OUS-IR	Vendor	OUS & ODE Total
\$11,650	\$19,950	\$53,200		\$39,134	\$13,300		\$110,000	\$235,584

## General Project Oversight

### Description

OUS campuses, CCWD campuses, ESD's, High schools and project staff will all expend Labor on this project.

This section overviews the involvement of project staff.

General Project Oversight	Total IDTS Cost <sup>1</sup>	Annual Pay Rate <sup>2</sup>	Yrs	% IDTS
OUS Project Manager (PM)	\$52,525	\$75,224	1.5	35%
OUS Communications/Editor <sup>3</sup>	\$33,055	\$47,340	1.5	35%
OUS Admin Support	\$41,456	\$41,560	1.5	50%
<b>Subtotal</b>	\$127,036			

<sup>1</sup> IDTS Cost for 1.5 years of the project does reflect OPE

<sup>2</sup> Annual Pay Rate doesn't reflect OPE

<sup>3</sup> Communications/Editor is normally employed at .70 FTE, half of which (.35 FTE) is assigned to the IDTS project.

## **CCWD Application Infrastructure**

### **Description**

Infrastructure specific to this project that will be needed to accomplish CCWD project goals are budgeted here

Community colleges will provide the hardware and software for this project. The value of this In-kind contribution is \$205,000.

## **CCWD Staff Travel**

### **Description**

The specific aspect of community college sending and receiving with other postsecondary institutions associated with this project is \$12,000.

The Department of Community Colleges and Workforce Development will contract for the oversight services. Costs to CCWD as associated with this contract are anticipated at \$100,000. This will include project management for the 17 community college EDI receive and send coordination. A contract will be used as a continuous project manager may not be needed.