

Project Name Transfer Equivalency Self-Service	Request Date 7/11/12	Project Number (AGIT Use Only) Nancy Krogh, University Registrar nkrogh@uidaho.edu
Project Sponsor Nancy Krogh, University Registrar	Desired Date Summer 2013	AGIT Owner (AGIT Use Only)
Short description of project / purchase (one sentence) Transfer Equivalency Self-Service is an add-on to our DegreeWorks product which allows potential transfer students to access our equivalency database and our degree audit on-line.		

ALL requested and/or recommended technology projects must complete the checklist below.

Definition: A project is a temporary endeavor undertaken to create a unique product, service, change, or result. A project is different from “business as usual” activities (operational work) in that it has a number of distinguishing features: it brings about change, has unknown elements therefore create risk that must be managed, and has a defined start and end (is temporary). In contrast, “business as usual” activities are characterized by having known policies, processes, procedures or precedents which may be followed, virtually no risk is present, the activities are not new but repeated (albeit not necessarily very frequently) and therefore does not offer change.

CHECKLIST

YES	NO	CRITERIA
X		1. Requires new ITS and / or other departmental information technology resources (including new or increased support needs)
		2. List amount of initial plus five-year on-going information technology costs for the project (i.e. first time hardware/software acquisition, professional services, annual maintenance, staffing, etc) <u>\$43,680 plus estimated staff time.</u>
X		3. Requires new integration with existing information technology or electronic data systems such as Banner, FAMIS, R25, and ITS Identity/Access Management.
	X	4. Affects information technology aspects of multiple organizational components of the university.
X		5. Has information security aspects with respect to implementation of the information technology (privacy, confidentiality regulatory or compliance).

- IF checking ‘NO’ to all criteria above, submit the completed checklist to AGIT for final review and approval.
- IF checking ‘YES’ to any of the criteria above, the Proposal form (below) must be completed and submitted to AGIT for further review and assessment.

AGIT Findings

1. Criteria utilized in review process

2. Findings

3. Comments

Proposal

OVERVIEW

1. **University Responsibility** - *Identify the name, email and phone number for the following:*
 - a. **Sponsoring Department** **Office of the Registrar**
 - b. **Executive Sponsor** (*highest ranking person responsible for acquiring all required resources necessary to successfully complete this project as well as removal of barriers that would impede its progress*).
Nancy Krogh, University Registrar
 - c. **Project Manager** (*individual responsible for the day-to-day coordination and management of this project*)
Dwayne Hubbard, Assistant Registrar

2. **Description** -- *Include in the description the following: the need, opportunity and/or the problem to be solved; the project scope including the definition of success; as applicable, describe the existing process that needs to be automated or enhanced; and for medium to large requests, provide a short description of each feature comprised in the project.*

The Transfer Equivalency Self-Service is a program that interfaces with DegreeWorks and Banner to allow potential transfer students to enter and save their transfer course information and see how those courses may apply to a degree at UI. Potential transfer students will be able to use this program when meeting with their advisors at their transferring institution or at UI to determine the appropriate courses to take before transferring to UI to minimize loss of credit in transfer and make their transition smoother.

This application is essentially an add-on to the existing Degreeworks application and utilizes the same system infrastructure. The data for this application will be stored in the existing Degreeworks database and the front-end for this application will be hosted on the same web servers from which the Degreeworks application is hosted. (Brian Borchers – 10/2/2012).

3. **Required Costs and Resources**
 - a. **Budget estimate** -- *Include both one-time and ongoing for hardware, software, staff hours (both ITS and non-ITS personnel -- including within the sponsoring department and others), consulting /professional services.*

Initial purchase:	\$22,800	
Maintenance for 5 years	\$21,411	
Including 10% increase per year:	\$44,211	
Implementation services:	\$5000	(estimate for travel expenses)
Estimated ITS hours:	64.5 hours	(implementation)
Estimated ITS hours:	267.5	(on-going over five years)
Estimated Registrar staff time:	210 hours	(Implementation)
Estimated Registrar staff time:	390 hours	(on-going over five years)
Hardware requirements:	None	(other than minimal disk space)

Please see the attached spreadsheets for details (Brian Borchers – 10/2/2012)

- b. **Financial commitments /resources for above**

Office of the Registrar budget

PROJECT BACKGROUND

1. **Context** -- Describe if it is a regulatory requirement, a mandate, supportive of a local tactical/operational plan, or supportive of a specific element of the University of Idaho strategic plan.

Transfer Equivalency Self-Service is a program that would support the transfer initiatives of the University and make it easier for potential transfer students to determine how their coursework may apply to a UI degree.

2. **Value proposition** -- Identify projected cost savings and/or efficiencies and/or profitability (if applicable) and the associated timeframe as well as related process or service improvements.

This will be a valuable tool faculty, advisors, and staff to use when working with potential transfer students to determine how their courses apply to a UI degree and what courses they could take that would apply towards their degree at UI and make their transition as smooth as possible. The ability of students to save their transfer course information in Transfer Equivalency Self-Service will also save time in the future when meeting with an advisor as they will be able to readily access that information and not have to go through the transfer guides each time they meet.

3. **Beneficiaries** -- Identify who on campus or which off-campus constituent group will directly or indirectly benefit.

Admissions recruiters, Registrar Office transfer specialist, faculty, and advisors will utilize this program when working with potential transfer students.

4. **Risks** -- Describe all risks associated with doing as well as NOT doing this project.

The biggest risk with pursuing this implementation is that the implementation does not go smoothly or that we have to re-evaluate how we record transfer work in Banner. The biggest risk with not pursuing this program is that some transfer institutions or UI colleges/departments may try to develop this information for potential students in another format that may not be accurate or consistent.

There are some additional risks to the Banner/DegreeWorks infrastructure, specifically the Banner web servers. As the proposed application will be deployed using the Banner web servers, as is the DegreeWorks web interface, these web servers will be impacted by any additional user load. In addition, the implementation of this application will add a product version dependency that may impact upgrade planning in the future. As the Transfer Equivalency Self-Service application version is tied to the version of DegreeWorks, we do not anticipate this will significantly impact management of the infrastructure. The implementation quote from the vendor states that service costs will be capped at 60 hours for consulting services and 9 hours for project administration. Any hours above that amount will be charged at the vendor current rates. Additionally, travel expenses are not included in the quote. These will be charged at the time the costs are incurred. (Brian Borchers – 10/2/2012)

5. **Alternatives Considered** -- Document alternatives considered and why rejected. Changes in business processes to accommodate existing technology solutions should be considered and documented.

We have also looked at [redLantern](#), formerly DARS which is similar to Transfer Equivalency Self-Service. The reason we chose Transfer Equivalency Self-Service over redLantern is we are more familiar with the program and the people behind the product because of our implementation of DegreeWorks. From all of the demonstrations, calls, and user guides we have seen Transfer Equivalency Self-Service should work very well with DegreeWorks and the way our course transfer information is recorded in Banner. There is also some cost savings to be realized with the credit we currently have with Ellucian.

As this application is offered by the same vendor that provides our current ERP and DegreeWorks, the University will be able to leverage the same contacts in support of this application. Office of the Register staff will also gain added value from Ellucian's annual conference which will provide opportunities for training, networking, and

potential collaboration with other customers using this product. By selecting this product, the risk of product incompatibilities is reduced by the close integration of this product with Degreeworks. (Brian Borchers – 10/2/2012).

6. **Timeframe and Urgency** -- *Identify relevant timeframes or related timelines. Do we need to do this right now or can it wait? Define the level of urgency and priority compared to other work, both project and operational.*

Ideally I would like to be able to have the program implemented during the Fall 2012 semester. We could then provide training and communication for the program in the Spring 2013 semester so that it could be used for the Fall 2014 recruiting cycle.

ITS/MIS should have the bandwidth needed to assist the Office of the Registrar when they are ready to implement this application. We will require assistance from the Network and Systems Team only for the opening of a port on the network and server firewalls for the Banner application servers. (Brian Borchers – 10/2/2012).

7. **Constraints** -- *Identify constraints such as budget, schedule, staff, equipment, facilities and infrastructure, etc.*

Due to position vacancies the biggest constraints on time for the implementation of this project will be the limited IT support time available within the Registrar's Office.

The main potential constraints on our system infrastructure will be disk space on the database servers and potential load on the Banner application servers. Based on the information we have received from the vendor and our initial estimates of application usage, we do not anticipate issues in either of these areas. We will closely monitor disk space after implementation and generate a projected growth based on this information. (Brian Borchers – 10/2/2012)

CONNECTIONS

1. **System impacts / dependencies** -- *Identify any prerequisite projects as well as any related or connected processes or projects that will need modification or changes as a result of this project. Describe how existing systems and processes need to be modified or extended to accomplish this project.*

Transfer Equivalency Self-Service will interface with DegreeWorks and some course transfer forms in Banner – student. From all of the presentations, discussions with Ellucian staff, and the review of the product user guides there *shouldn't* be any modifications needed to our existing programs or processes.

As the Degreeworks and Transfer Equivalency Self-Service applications must be synchronized, the Office of the Registrar plans to upgrade Degreeworks from 4.0.9 to 4.1.1 before implementing Transfer Equivalency Self-Service 4.1.1. No modifications to our existing system infrastructure will be required, apart from a minor firewall change, as we are already at the appropriate versions of all support software to meet vendor requirements for this application. (Brian Borchers – 10/2/2012).

2. **Enterprise Systems Integration** -- *Requirements for interfacing to all institutional IT/ ERP systems including but not limited to: ITS Authentication (LDAPS), Banner – HR, Banner – Finance, Banner – Student, VandalCard, Document Imaging, Web Services, and Help Desk.*

As mentioned above Transfer Equivalency Self-Service will interface with DegreeWorks and Banner – student.

The Office of the Registrar is correct that integration should be with Degreeworks and Banner. The Banner interface will be only through a nightly job that will pull course equivalency data Banner and load into

Degreeworks. The web interface will interface directly with the Degreeworks database. As this will be an outward facing application for non-affiliated transfer students to determine how courses will apply to the University of Idaho, there will be no integration with the University's LDAPS service (Active Directory). (Brian Borchers – 10/2/2012).

3. **Stakeholders -- impact and/or buy-in** -- *Identify various stakeholders (both from within ITS and outside) whose support is required to make this project successful. Has their buy-in been secured? If not, what conditions or constraints have they placed on their support?*

Acquisition of Transfer Equivalency Self-Service or a similar program has been discussed for several years within Enrollment Management and with some advisors. I believe Sharon has talked to Kyu in the past about the ITS resources that may be needed during the installation of the program, but am not positive.

The ITS/MIS database administrators will be needed to establish the application database structures and to deploy the application war files on the Banner web servers. Network and Systems staff will be needed to apply necessary changes to the network and server firewalls. Ongoing assistance will be needed from the ITS/MIS DBAs to apply any upgrades of this application to the Banner infrastructure. (Brian Borchers – 10/2/2012).