

Project Name GSMU BbLearn Add-On	Request Date 5-05-2014	Project Number (AGIT Use Only)
Project Sponsor Professional Development & Learning	Desired Date 6-30-2014	AGIT Owner (AGIT Use Only)
Short description of project / purchase (one sentence) GoSignMeUp add-on that would enable the University to use BbLearn for workplace e-learning and live training		

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) \$ _____
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** Human Resources (Professional Development & Learning)
 - b. **Executive Sponsor:** Ron Smith, Vice President for Finance and Administration; 885-7090; smithr@uidaho.edu
 - c. **Project Manager:** Elissa Keim, Director, Professional Development & Learning; 885-2322; ekeim@uidaho.edu

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 University of Idaho's employee training needs have become essential for university compliance, employee competence, employee retention, and transfer of institutional knowledge. The SBOE, through Kent Nelson, our University of Idaho Compliance Officer, has stipulated that the University must provide evidence of compliance training for our activities, employees, and outcomes. Compliance training topics include administrative and personnel requirements, research, workplace climate, public safety, and resource management. The University's obligations in this regard have outgrown our current arrangements and we seek your assistance in obtaining resources to manage these obligations and build towards a comprehensive, sustainable University of Idaho employee training plan. The timing of this request is particularly prudent because the University is preparing to launch a comprehensive employee compliance training initiative.

Professional Development and Learning (PDL) is the University of Idaho department charged with professional development and training for all University of Idaho employees. The University benefits from a centralized employee training mechanism and repository, housed within the primary staffing department, Human Resources, and managed by the dedicated university employee training unit. A centralized training function ensures decreased redundancy of functions (cost savings), increased collaboration and coordination between employee training stakeholders, and a more efficient transfer of knowledge to employees.

In November 2013, Professional Development and Learning (PDL) and the Department of Public Safety, with the support of the PDL Coordinating Committee, jointly requested permanent, on-going funding from the University to support NetLearning@uidaho (a learning management system launched by EHS in 2008 to fulfill health and safety compliance training requirements) and its future expansions. The annual amount requested was \$73,000. In early 2014, \$32,000 in one-time funds was transferred to PDL to begin the project. Since that time technological and financial constraints have pushed us to examine other options.

GoSignMeUp, an add-on to **BbLearn**, would provide an affordable, sustainable system that mirrors our (ever-changing) organizational structure, easy and intuitive user and administrative interface, employee access to their training records and simplified reporting functions and system that multiple departments on campus could easily use. The system comes at a substantial cost savings (an estimated minimum \$40,000 per year) to NetLearning@uidaho and builds on a system, BbLearn, which is already supported at the University of Idaho. Additionally, GoSignMeUp could function as a stand-alone system for handling registrations, employee training course management and training record management and reporting.

Brian Borchers - (05/12/2014)

GoSignMeUp is delivered through the SaaS (Software as a Service) model. No internal technical infrastructure or staffing resources will be required to host this application, however technical resources will be required to implement and maintain interfaces between this application and both BbLearn and Banner. Additionally, since users will be allowed to log in directly to GSMU, in addition to navigating through BbLearn, integration with our SAML-based authentication facilities will be required.

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.

Personnel: Learning Management System Coordinator, Professional Development and Learning, \$40,000 +fringe

5,000 Users Blackboard Edition (GoSignMeUp Hosted) Yearly Option to Renew	
Yearly License - License Entitlement provides for 5,000 users	\$20,000
Set up (Year one only) Includes installation and website branding	\$1,500
Training (Year one only): Four live training sessions.	\$1,500
YEAR 1 TOTAL	\$23,000
YEAR 2 RENEWAL	\$21,000
YEAR 3 RENEWAL	\$22,050
3-YEAR TOTAL	\$66,050

5,000 Users Blackboard Edition (GoSignMeUp Hosted) Yearly Option to Renew	
Yearly License - License Entitlement provides for 5,000 users	\$18,000
Set up (Year one only) Includes installation and website branding	\$1,500
Training (Year one only): Four live training sessions.	\$1,500
YEAR 1 TOTAL	\$21,000
YEAR 2 TOTAL	\$18,000
YEAR 3 TOTAL	\$18,000
TOTAL (PAID UP-FRONT)	\$57,000
SAVINGS	\$9,050

Brian Borchers (05/012/2014)

A summary of the 5-year total cost of ownership is provided here for the options reviewed in this proposal. Please refer to the accompanying option spreadsheet for the detailed breakdown of the costs for GSMU.

Option Name	Implementation	Ongoing	5 Yr App Costs	5 Yr Staff Costs	Total 5 Year
NetLearning@Uidaho.edu	\$10,500	\$62,500	\$323,000	\$30,740	\$353,740
GoSignMeUp	\$25,260	\$18,000	\$121,005	\$48,360	\$169,365

For the purposes of this cost analysis, I assumed similar ongoing operational staffing effort for both products. The difference between the two staffing amounts largely reflects the level of effort to implement GSMU and the ongoing maintenance of the BbLearn, Banner, and SAML interfaces.

b. Financial commitments /resources for above

\$32,000 in one-time funds has been transferred to Professional Development and Learning for this project.
 \$40,000 + fringe has been transferred to Professional Development and Learning for the Learning Management System Coordinator Position

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.*

At the urging of the SBOE and the direction of the Office of General Counsel, the University has renewed focus on compliance-related employee training. Topics include administrative and personnel requirements, research, workplace climate, public safety, and resource management. In today's compliance based environment, documentation of training is a critical component. In addition, providing a consistent location and tracking of employee training will assist in managing, developing and retaining University of Idaho employees.

- 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.*

A learning management system (LMS) automates tasks associated with the learning/training function for the University. A LMS supports classroom training and e-learning, has features related to human resource functions (talent management, performance management and skills and competency management), and is a reliable tool for recording university compliance in employee training. LMS utility increases when used in conjunction with a course hosting platform (such as BbLearn). A centralized LMS will improve consistency and delivery of training, improve tracking systems and provide the ability to deliver more robust e-learning, which is especially important for our off-campus sites. By utilizing a centralized LMS, the University of Idaho can make required training and learning sessions less of a burden for their employees and better meet compliance audit requirements.

Brian Borchers - (05/12/2014)

The five year total cost of ownership for our existing NetLearning@uidaho solution, and adding the additional courses necessary for compliance training, stands at \$323,000 (vendor costs only). Conversely, the projected five year total cost of ownership for GSMU is \$169,365 (fully loaded) which, even while continuing to maintain NetLearning for other training, represents a savings over implementing the compliance training inside NetLearning. Over time, it is possible that GSMU is a replacement option for NetLearning and will eliminate some amount of duplicity by shifting management of course content to the BbLearn LMS. Currently, both course registration and course content are maintained in NetLearning@uidaho.

In addition to the management of employee online training, this application could also be utilized by other groups at the University to manage events, including the collection of payments.

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

University of Idaho administration and employees as a whole. Additionally, compliance training stakeholder groups including: Academic Affairs, Dean of Students, Environmental Health and Safety, General Counsel, Human Resources, Human Rights, Access and Inclusion, Information Technology, Internal Audit, University Ombuds, Public Safety and Security, and Office of Research.

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

The University of Idaho can make required training and learning sessions less of a burden for their employees and better meet compliance audit requirements. Risks include potential fines and lack of funding from the government and other granting agencies due to lack of compliance for adequately documenting training completion.

Brian Borchers – (05/12/2014)

While PDL has no intention of utilizing this capability at this time, GSMU does support online payment for course registration. GSMU does not process payments directly, instead offering integration with PCI-compliant third party partners such as PayPal and TouchNet. While the underlying databases should contain no credit card numbers and associated information, GSMU can be configured to collect such information for transmission to the payment process vendor.

As the application is intended to be used initially, employee records will include the following information: PIDM, First Name, Last Name, UserID, Vandal #, email, Department, Course Registration, and Completion Status. None of these data elements are currently restricted from cloud implementations.

The integration of BbLearn is dependent on the implementation of new functionality in the product not yet released for production. The pending change will allow us to tie the two applications together by the employee PIDM. Until that change is in place, GSMU will not be able to accommodate updates to employee userIDs, which will impact our ability to accurately maintain employee training records. While there is a possibility this functionality will be ready before implementation is completed, PDL and DEE staff are prepared to manually enter this information until it is in place.

Finally, integration of the GSMU application with BbLearn will create a dependency which may impact our ability to upgrade the BbLearn application. We have spoken with the vendor regarding this concern and currently the vendor is not significantly behind in certification of BbLearn version. If that does ever become an issue, we will have to choose between risking the implementation of an upgrade without full vendor support, or being delayed in the implementation of new features in BbLearn.

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

BbLearn with no add-on: As currently configured, BbLearn is *not recommended* for a workplace e-learning platform. It does not meet many of the critical needs related to workplace training assignment, recordkeeping and reporting. Modifications would need to be identified (many) and would be costly to implement, leaving us with yet another system that is being used as it was not intended. Further, additional systems would be necessary to support missing functions.

NetLearning@uidaho: As currently configured, NetLearning is not recommended as the long term workplace e-learning solution for the University. The costs associated with course upload and individual course user fees are substantial, and unsupported over the short and long term. The system is built on an organizational hierarchy that does not mirror the University's organizational hierarchy, as it exists in Banner. Additionally, the lack of streamlined processes on the administrative side make it challenging to deploy large audience training initiatives.

Train Track: legacy system written in old code and no longer supported by ITS.

Brian Borchers (05/12/2014)

Train Track: ITS does in fact support this application on a limited basis, however considerable modification would be required to fulfill PDL tracking requirements and would also require the development of an interface with BbLearn. The main reason we continue to maintain this application is because there are automated features behind the Banner training hosted on this application that drive our user account management process. A secondary goal to any selected solution would be to integrate the Banner training processes so Train Track can be retired.

Banner: This application includes functionality to manage student registration; however this functionality is geared toward academic environments and is not particularly well suited to tracking employee online training. Additionally, Ellucian offers a separate package called Flexible Registration which probably covers this. I will request a quote for this product and pass that along when it arrives.

Other Third-Party Applications: There are a number of cloud-based applications that provide functionality for course registration, however none of the products we reviewed provide ongoing record management and content management features. Also, GSMU was the only third-part application we could find that integrated with BbLearn, thereby eliminating the duplicity in this area.

5. **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.*

Deployment of first wave of university-wide compliance trainings will be in early September 2014, as per commitments made by the University to the Office of Civil Rights.

Brian Borchers – (05/12/2014)

If this proposal is approved, there will be approximately 3 months to complete the implementation of this application, based on the PDL timeframe indicated above. With two significant action items for ITS staff (SAML-based central authentication, and a web services-based Banner integration), it will be important that this approval be communicated as early as possible. In addition, while BbLearn integration will largely be carried out by GSMU staff, this will also require involvement of Distance and Extended Education staff.

As indicated above, we are dependent on pending changes in GSMU in order to implement the interface to BbLearn. While it has been determined that we can go live without this interface in place, it will result in some impacts on PDL and DEE staff as they'll need to manually maintain this data between the two systems. We are waiting for an estimate from the vendor on when these changes will be available in their production system.

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

As of 5/8/2014, a request for permanent funding is pending as part of this year's budgeting process.

Brian Borchers – (05/12/2014)

A number of technical projects have been scheduled for the summer and ITS staff availability will need to be adjusted if this project is approved. As most of the technical architecture of this implementation has been discussed and identified, this impact is not expected to be significant. While ITS/EA developers will likely be assigned to the Banner integration task, Sharon Jemes (Registrar's Office) may be needed for consultation on that effort and her availability will be limited during the implementation period. This may impact progress on this interface marginally.

As both GSMU and BbLearn are hosted (cloud) solutions, there should be no equipment, facilities, or infrastructure constraints. As data will be pushed from Banner to GSMU, there should be no firewall issues to address in this implementation.

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.*

Brian Borchers – (05/12/2014)

During the review of this proposal, the current configuration of authentication in BbLearn was raised as a concern. ITS Information Security Officer and Customer Support indicate that BbLearn should be upgraded to utilize SAML-based authentication, replacing the existing LDAP-based authentication framework. After discussions with both vendors, it has been decided that this will not be made a requirement of the GSMU implementation. As the upgrade to SAML 2.0 authentication will provide functional benefit to BbLearn users and DEE staff, this will be scheduled as a separate project, however it will take several months because of the immaturity of this configuration in BbLearn.

There is possibility that the Banner interface to GSMU will be implemented as an extension of the existing interface that feeds BbLearn. At the time of this writing, it is likely however that this will be implemented as a completely separate interface, based largely on the logic currently in place in the BbLearn feed process.

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.*

Brian Borchers – (05/12/2014)

Based on discussions with the business units involved and separate conversations with vendor's technical team, the following integrations will be required as part of this implementation:

Banner: A feed from Banner will be required to establish employee user accounts in this application. The primary reason that a direct feed from Banner would be preferred is 1) BbLearn doesn't have the organizational hierarchy relationships that are stored in Banner and 2) by feeding all employee information from Banner, users would be able to log directly into GSMU, providing some flexibility and efficiency in the use of the application.

The vendor provides two methods for implementation of the Banner interface. The preferred method is utilization of a web service they provide on their end. This web service is designed to manage all of the logic necessary for updating the employee list in GSMU and provides additional security benefits from a standard flat file interface. The second option is to pass files to the vendor using FTP/SFTP. We have minimal experience with developing web service interfaces, however this is technology we need to master as it has become the industry standard for data interfaces.

BbLearn: As the LMS will be used to manage course content, this interface will be necessary to feed source registration and completion status between the two systems. This interface will largely be implemented by the vendor as part of the implementation cost, but they will require assistance from Distance and Extended Education staff to complete this work.

SAML Authentication: There are several aspects of this issue which will need to be addressed. BbLearn is currently configured with LDAP authentication to our central authentication services. The expectation is that this interface will need to be upgraded to SAML-based authentication before proceeding with the GSMU implementation. Once that is completed, users should have the ability to access GSMU through the BbLearn interface using single sign-on. The GSMU vendor will work with DEE staff to configure BbLearn for this capability. The GSMU application will need to be configured for SAML-based authentication in order to support direct login. This work will be coordinated between the vendor and ITS Customer Support.

NOTE: After discussions with both vendors, Customer Support has decided that the GSMU implementation can move forward without the BbLearn being upgraded to SAML authentication. Users will still have the ability to log in through BbLearn using single sign-on. The BbLearn SAML upgrade will continue as a independent project.

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?)*

Stakeholder groups including: Academic Affairs, Dean of Students, Environmental Health and Safety, General Counsel, Human Resources, Human Rights, Access and Inclusion, Information Technology, Internal Audit, University Ombuds, Public Safety and Security, Office of Research, Distance & Extended Education.