

# Advisory Committee SOA Project Charter

Draft Only

***Title: Advisory Committee Web Services (SOA) Project***

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## **I. Background Relevant to the Project:**

The Grant Delivery System is a complex application that allows the Student Aid Commission and post secondary education institutions to award, pay, and manage Cal Grants and Chafee awards for students attending post secondary education institutions. It also provides the means for high schools and post secondary institutions to submit student Cal Grant GPAs and other supplemental information needed by the system.

The Grant Delivery System (GDS) was originally written in the 1990s using Natural, ADABAS. Between 1997 and 2000, the system was converted to PL/SQL and Oracle. The rewrite concept basically consisted of taking a line of Natural code and converting it to a line of PL/SQL code. Though the rewrite was much more involved than this description, it nevertheless resulted in inefficient, redundant code.

The ADABAS database, a hierarchical structure, was converted to an Oracle database, which has a more traditional relational structure. The resultant database did not take advantage of the benefits of a relational structure, and included tables that were obsolete and columns that were empty or not being used.

Phase 1 of the RTDB was designed to begin cleaning up the database and establishing atomic stored procedures that cleaned out duplicate code and could be used by calling procedures such as batch procedures. We accomplished these goals through the completion of these aims and objectives.

1. Reduce the complexity and improve the flexibility of the system to adapt to changes.
2. Clean up the code, remove unneeded debug and/or print statements.
3. Apply sound coding techniques based on refactoring guidelines.
4. Develop reasonably sized blocks of code.
5. Improve comments where appropriate.
6. Use parameter passing design approach where practical.
7. Develop standard methodology for exception and error handling.
8. Develop real time transactions to augment existing batch transactions where practical.
9. Clean up database by removing unused tables/columns and tab\_data.
10. Remove duplicate code by combining competitive and entitlement logic where feasible.
11. Convert Oracle Forms and Active Server Page's to .NET Active Server Pages that will allow subsequent full conversion to ASP.NET 2.0.

***Aims & Objectives of the Service Oriented Architecture:***

The primary goals for Phase 2 of the project are to provide five Web services and Web Grant Screen improvements so that we may better serve students, institutions, and staff. The proposed changes will increase our agility, provide quicker turnaround from inputs to results, and give stakeholders more direct access to their information. We will accomplish these goals through the completion of these aims and objectives.

***Objectives:***

1. Successfully solicit requirements from our institutional, HS, and Vendor community using the project advisory committee.
2. Allow institutions to be able to use web services to get and update current award status, payment, GPA, and 'school change' transactions.
3. Encourage the adoption and use of CSAC Web services by FAMS vendors and institutions by providing technical information that would allow them to incorporate these services into existing or new applications using the Web Services Definition Language.
4. Improve security with the new ASP.NET environment.
5. Increase ability to quickly add new functionality to existing WebGrants and WebGrants for students.
6. Improve WebGrant Screens functionality.

**II. Purpose of the Advisory Committee:**

- a. To coordinate the development of standard Web services and solicit school and vendor requirements and priorities for desired Web services automation interfaces.
- b. To determine and recommend to schools, strategies and practices for field implementation of the wide spectrum of the available GDS functionalities. e.g.
  - Full Web services implementation by early adopter
  - Partial Web services implementation
  - Phased Web services implementation
  - Only using WebGrants and real time
  - Continued use of WebGrants and batch processing
- c. Communicate proposed interfaces and implementation timelines.
- d. Solicit partners to actively participate in the Web services implementation and testing effort.
- e. To identify desired present and future real time functionality enhancements for WebGrants and Web services.

**III. Scope and Deliverables**

- a. User requirements for desired web services automation interfaces for the Grant Delivery System.
- b. Implementation Strategy Plan for schools and vendors.
- c. List of participating schools/vendors during Phase 2.
- d. Five Web Services interface specifications.
- e. Implementation suggestions for tools, procedures, and process.
- f. Proposed enhancements for future.

#### **IV. Priorities:**

- a. The primary priority of the committee is the identification and delivery of the required Web Services standards and specifications.
- b. The Second priority is providing a sound implementation strategy for schools and vendors that encompass the wide range of technologies across the segments. The wide variety of automation systems will require extensive coordination of specifications, standards, and requirements.
- c. The Third priority is to solicit schools and vendors to participate in Phase 2 development to demonstrate the successful implementation of Web services.
- d. The Fourth priority is identifying present and future enhancements to the WebGrants.

#### **V. Milestones:**

- a. Jul 2007 Confirmation of initial committee membership.
- b. July 2007 (Month M + 0) First meeting and overview of charter and advisory committee process.
- c. July 2007 (Month M + 0) Solicitation of participating schools and/or vendors in phase 2 integration and development.
- d. Aug 2007 (Month M+1): Finalization of initial Web services specification to be supported and confirmation of participating schools and/or vendors.
- e. Sept 2007 (Month M+2): First draft of specification standards and process.
- f. Oct 2007 (Month M+3): First meeting and overview of charter and advisory committee.
- g. Nov 2007 (Month M+4): JAD on Web services requirements.
- h. Dec 2007 (Month M+5) First draft of specification standards and process.
- i. Jan 2008 (Month M+6): First draft of implementation strategy.
- j. Feb 2008 (Month M + 7): Completion of testing/implementation of first Web Service with school/Vendor.
- k. Mar 2008 (Month M + 8) : JAD on enhancements for future.
- l. Apr 2008 (Month M + 9): Final Web services specifications published.
- m. May 2008 (Month M+10): Final implementation strategy published.
- n. June 2008 (Month M +11): Final enhancements for future.
- o. July 2008 (Month M +12): FSR for future enhancements.
- p. Aug 2008 (Month M+13): Web services available.
- q. Sept 2008 (Month M +14): Testing / Training.

r. Oct 2008 (Month M +15):Lessons Learned.

#### **VI. Participation Criteria:**

- a. Members will be solicited on a volunteer basis from a variety of institutions and segments.
- b. Membership is open to CSAC staff, school financial aid administrators, school IT support staff, FAMS vendors, and segmental or association representatives.
- c. Members or alternates should make every effort to participate in scheduled meetings and teleconferences.
- d. Members should quickly respond to requested reviews, evaluations, and requirements requests.
- e. If travel is involved, members agree to pay for travel/lodging where possible.
- f. See the organizational chart for CSAC members.
- g. The need to implement Phase 2 in one year will require concise and focused input from members.

#### **VII. Duration**

- a. This Advisory Committee is scheduled to last 15 months, from July 2007 to October 2008.
- b. As of November, members will meet twice a month, on the first and third Tuesday from 1:30-2:30 p.m., PST.
- c. If a meeting falls on a holiday, the committee will not meet that day.
- d. It may be extended or reformulated for follow-on system enhancements/extension.

#### **VIII. Communication Mechanisms:**

In the interest of greater customer involvement, it is expected that all technical discussion will take place through a number of channels such as those listed below.

##### **a. E-mail**

A mailing list will be used to communicate technical discussions, distribute documents, publish minutes of committee meetings, track issues relating to material previously made public, distribute updated versions of documents, conduct discussion on published documents.

##### **b. Web**

An Advisory committee Website will be established to keep project status, meeting schedules, minutes and deliverable. These shall be regularly updated and will reflect the current status of the group and provide summaries of ongoing activities, documentation and other resources related to the group tasks, including relevant submissions from stakeholders and customers.

In addition, an advisory committee contact page will be located on the CSAC home page to provide financial aid administrators with contacts to forward suggestion and comments to committees members.

Web Conferencing will be used to review application screen layouts and other project documents when face to face meetings are not practical.

**c. Teleconference**

The Committee will schedule periodic one-hour meetings as necessary for telephone conferencing. Telephone conferencing will consist of team members and external non-member participation will be encouraged and considered on a case-by-case basis. Approved minutes of these conference calls shall be made public.

**d. Face-to-face Meetings**

Face-to-face meetings will occur about every 3 or 4 months at locations determine by the committee members. Travel expenses will normally be covered by participating members. Meeting schedules will be coordinated by the project committee liaison.

**e. Communication with Customers**

Fast Blast, CSAC Web site, Operational Memos, Special Alerts and list serves will be used to keep customers informed of the project and advisory Committee status and decisions.

**IX. Decision Making and Consensus:**

- a. Most functional requirement decisions will be made by consensus. In instances where the Advisory Committee cannot arrive at a consensus on a critical operational functional requirement supported, they will adopt the resolution by vote of the members present.
- b. Decisions requiring policy changes will be forward to appropriate committees or entities for review.