


IMMEDIATE NEED REQUEST

2017-18

Requested by: Chau Dao, Financial Aid, Student Services, Dr. Yamagata-Noji

Approved 10/31/17
 Rik
 MT-SAC!
 Mt. San Antonio College

Location	(Fill-in)	Reviewed By (Signature):	Date to VP: 10/24/2017
Department or Unit:	Financial Aid		Date to Cabinet: 10/31/2017
Division:	Student Services	Outcome:	
Vice President:	Audrey Yamagata-Noji		

Budget Request(s) (List in Priority Order)	Justification for Request(s)	Funds Requested **			Funding Approved
		Amount	One-time	Ongoing	
1. TD Client Implementation for Financial Aid file batch processing; Consulting fee with Strata Information Group (SIG)	<p>An "Immediate Need" is a shortfall in funding that, unless funded immediately, could cause a program to cease to function.</p> <p>Request for one-time funding through Immediate Needs in the amount of \$22,000 for implementation of TD Client software. The bulk of the expense is for consulting services from Strata Information Group (SIG) to help us script and implement TD Client. What this will do is automate financial aid batch file processing using the Automic Applications Manager scheduler coupled with the Department of Education's TD Client software. These tools allow for full automation (upload and download) FAFSA files (ISIRs), Federal Pell Grant and Direct Loan files (COD), and correction files. Our current manual process requires staff members to dedicate at least 10 hours a week or 40 hours a month to upload and download files. And during our peak processing times, more time is needed. And I am sure you will understand that with manual loading of files, we have experienced human errors which cause delay in processing for our students. This project will have a large impact for students as efficiency will be immediately improved. With automation, there will be continuous loading of files, not only freeing up staff members to work on projects and enhancements, this will increase efficiency with processing financial aid files for our students. This is a one time cost and I have vented the SIG work with other comparable community colleges. There is no required maintenance from year to year. I have also had an in-person briefing with the SIG consultant who will be assigned to this project. The IT team is also on board as they were pulled in to the briefing as well.</p>				
Account Number(s):	11000-504000-561000-646000		\$22,000		



**Strata Information Group
Statement of Work
(MTSAC-SOW101-TDCLIENT)
September 26, 2017**

Mt. San Antonio College

TDClient® Implementation

Under the terms of the Agreement dated July 26, 2006 and further amended July 1, 2016, Strata Information Group (SIG) will provide consulting services for the staff of Mt. San Antonio College (MTSAC) as directed, to perform the following work.

Description of Work:

On August 18, 2017, Antonio Bangloy requested that SIG generate a proposal to provide MTSAC with consulting services to improve the automation of Financial Aid batch file processing using the Automic® Applications Manager scheduler coupled with the Department of Education's TDClient® software. These tools allow for full automation (upload and download) of ISIR, COD (Pell and Direct Loan), and correction files. Additional details outlined below.

Proposed Services:

Tasks	Hours
Functional and technical consulting	
• Implement and configure TDClient® software (including custom scripts)	120
Total Hours:	120

Summary of Estimated Costs:

Labor:	Travel Expenses:	Total Cost:
\$18,600	\$3,400 (2 on-site weeks)	\$22,000

Notes:

- Rate: \$155/hour for on-site and remote delivered services through June 30, 2018; rates may increase by \$5/hour effective July 1, 2018, and on each subsequent year.
- SIG will invoice only for the consulting hours and travel expenses actually used.
- The hours estimate includes project management, preparation time, travel time, on-site and remote labor, and the development of trip reports.
- Approximate hours and costs are based on the estimated tasks to complete this project as described in the attached "General Outline of Services." This may vary based on the assumptions listed and changes in MTSAC's needs.
- Travel expenses, if applicable:
 - Travel time is capped at 8 hours per trip.
 - Travel expenses are estimated at \$1,700 per consultant, per week.
 - SIG will make every attempt to reduce travel costs, including coach airfares and the use of the client's recommended lodging.
 - Actual travel expenses may be lower or higher than estimated. Labor costs may be adjusted to accommodate this as long as the total cost is not exceeded.
- Costs exclude all state taxes, if applicable.
- SIG will invoice for meals and incidental expenses on a per diem basis. Receipts will not be provided. Per diem rates are generally based on GSA guidelines. Per diem rates are: \$64 per full on-site day \$48 per partial day

For Mt. San Antonio College:

For Strata Information Group:

DocuSigned by:

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Sep-26-2017

Dr. Audrey Yamagata Noji
Vice President of Student Services

Date

Henry A. Eimstad
President

Date

General Outline of Services

These services are subject to change depending on MTSAC's priorities, needs, and availability of staff and systems.

Detailed tasks:

1. Engagement management (remote)

- Facilitate project planning kick-off conference call/initial introductions
- Review topics and facilitate preparation of agenda in advance of on-site visits
- Coordinate and test remote connectivity for SIG consultants
- Monitor budget and project tasks
- Monitor trip reports and escalate/resolve issues as needed
- Facilitate project update conference calls, as needed

2. TDClient® implementation – configure TDClient® (1 week on-site, plus remote follow-up)

- Work with IT and the designated Financial Aid staff to download the TDClient® software
- Define how to manage the EDConnect® and TDClient® passwords
- Create all needed directories
- Identify current use of all Department of Education message classes and files
- Determine which can be downloaded by TDClient® and the desired timing whether daily, specifically:
 - Days, weekly, or others
 - Determine which files are not being downloaded, but could or should be
 - Determine which files will be managed by TDClient® using Automic® Applications Manager.
 - Design Windows batch scripts or UNIX shell scripts, depending on environment, to manage and archive incoming and outgoing files including, but not limited to the following:
 - File concatenation
 - Stripping of header and trailer records for incoming files
 - Adding of appropriate header and trailer records for outgoing files
 - Build processes to download files via TDClient® using Automic® Applications Manager to pass the files to anner® and run Banner® processes
 - Test both incoming files and exported files
 - Complete knowledge transfer and training on the Automic Applications Manager TDClient® implementation

3. TDClient® implementation – configure processing chains (1 week on-site, plus remote follow-up)

- Link to Banner® from Automic® Applications Manager
- Process creation
- Perform job building
- Setup of parameters, variables, and prompts
- Manually execute job scheduling chains
- Build and test the Automic® Applications Manager batch processing chains
- Assist the designated Financial Aid and IT technical staff member in the build processes, as identified in #2 above, in a test instance
 - Test in parallel manually running jobs in Banner® and running the Automic® Applications Manager
 - scheduling chain
 - Ensure that dynamic parameters, particularly dates work as defined in Automic® Applications Manager
 - Complete testing and move to production

4. Project wrap-up & follow-up (remote)

- Document activities in comprehensive report
- Provide remote follow-up support (not to exceed the scope of this engagement)

SIG assumptions and access requirements to be provided by MTSAC, as applicable:

- Provide a designated, single point of contact for SIG staff to coordinate planning and logistical needs
- Provide secure local and remote access to all required systems, software tools, or applications as required with the most current data available for SIG staff access
- Assist with installation and configuration of necessary hardware and software agreed upon prior to SIG beginning its work
- Provide existing documentation as determined in initial conference calls and during on-site visit
- Provide access to IT staff, key functional users, or other staff as needed in a timely manner throughout the engagement
- Provide timely technical support to the SIG consultant(s) when needed; SIG's ability to perform requires timely support from the MTSAC staff
- Provide a dedicated meeting room(s) and/or work space with audio-visual equipment as necessary during on-site visits for consulting, one laptop computer as necessary with Microsoft Word®, Excel®, PowerPoint®, and other software necessary to access systems required to perform the work
- Advise SIG of vacations, holidays, hardware maintenance, planned power outages, or other scheduled activities that would impact delivery of service