

# CA - PMM

**Project Name:** Expand External Interfaces - Upgrade CalSOAP to Oracle  
**OCIO Project #:** 7980-  
**Department:** California Student Aid Commission  
**Revision Date:**

## Concept Statement

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### Description

**Brief description of the proposed project:**

This project is will be done in collaboration with the CalSOAP regional offices throughout the state. CSAC will develop a central Oracle system with web enabled screens that will allow for the CalSOAP regions to enter data into a central repository. This will allow CSAC to generate reports for the LAO at any time.

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### Need Statement

**High Level Functional Requirements:**

CSAC will need to procure mail room equipment to be able to take over the mail room operations. CSAC will hire staff, write procedures, policies and guidelines for these staff.

**What is Driving This Need?**

The current CalSOAP system is an Access system that has a web front end. The vendor who owns and updates the system has allowed each region to customize their database thus having many variances for each region. CSAC who over sees and funds the CalSOAP regions must report to the LAO on the regions workload. With varying database, the collection of data is difficult to compile. CSAC must report to LAO on the CalSOAP progress and funding needs. The current vendor charges each region for their system and any changes they need/want.

**Risk to the Organization if This Work is Not Done:**

CSAC will have to continue to do additional work to compile information from each site to monitor their workload and spending. CSAC manages each regions transaction and must approve any spending with justifications. With each system different, there is a challenge to understand each region's requests. If CSAC does not manage the regions effectively the program will be cancelled and awareness to students will cease.

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## Benefit Statement

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### Intangible Benefits

**Process Improvements** (describe the nature of the process improvement):

The regions will have a universal system which will help them perform their duties in a uniformed way. Training for all regional offices could be done by CBTs.

**Other Intangible Benefits:**

CSAC will be able to monitor and report on the region's activities effectively. The Managing and monitoring of transactions at each region will be universal and make it easier for CSAC staff to manage.

### Tangible Benefits

**Revenue Generation** (describe how revenue will be generated):

The CalSOAP System will be an Oracle in house system that CSAC staff can support.

**Cost Savings** (describe how cost will be reduced):

CSAC staff will be able to enhance and fix issues at a reduced cost since it will not be proprietary software.

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**Cost Avoidance** (describe the cost and how avoided):  
 Utilizing experienced CSAC staff to develop and implement a CalSOAP system comparable to the existing CalSOAP system. The CSAC Staff have Oracle experience and already support the WebGrant system.

**Risk Avoidance** (describe the risk and how avoided):  
 CSAC will utilize experienced programmers, testers and project managers to complete the project. CSAC will reuse functionality and processes from other projects developed at CSAC.

**Improved Services:**  
 CSAC will develop and enhance the CalSOAP system to ensure the program is run and managed effectively.

## Consistency

"No" Responses →		Rationale	Action Required
Enterprise Architecture	Yes	Reuse and share existing tables and stored procedures.	
Business Plan	Yes	Provide education and awareness to students.	
Strategic Plan	Yes	Provide information to all users so processes are understood by all staff.	

## Impact to Other Entities

### Nature of Impact to Other Entities

**Entity:**  
 Describe the nature of the impact:  
 The Commission will develop a CalSoap system that will replace their existing system. There will be a small learning curve but overall the system will be more user friendly.

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user identity.

**Entity:**  
*Describe the nature of the impact:*  
Currently each region has it's own database with different data fields. Regions will be able to assist each other with a universal system and shared data.

**Entity:**  
*Describe the nature of the impact:*

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### Solution Alternatives

#### Alternative 1:

Develop a universal system that will provide data into a central repository for the regional offices. This project will replace a web enabled access system that has separate distributed systems that report via excel export to CSAC. This solution will be a web enabled system with a central database. The system will have precann reports and allow for data sharing. CSAC will procure and install a webserver and database for CalSOAP.

#### Technical Considerations for Alternative 1:

This solution will comply with the CSAC strategic direction of providing data exchange. The solution will reuse existing table structures and stored procedures to allow for ease of maintainence. This new system will eliminate a proprietary vendor and allow CSAC to query information on CalSOAP at any time. This user friendly system will eliminate the special training now required by the customized systems that have been developed.

ROM Cost: to

Note: high end of range must not exceed 200% of low end of range

#### Alternative 2:

status quo

#### Technical Considerations for Alternative 2:

None unless we must interface with the vendor.

ROM Cost: to

Note: high end of range must not exceed 200% of low end of range

#### Alternative 3:

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Technical Considerations for Alternative 3:	
ROM Cost: _____ to _____	Note: high end of range must not exceed 200% of low end of range

### Recommendation

**Comparison:**

Alternative 1	ROM Cost	Risk
Develop CalSOAP sytem	\$0 - \$0	
Alternative 2	ROM Cost	Risk
Status Quo	\$0 - \$0	<i>schedule and budget risks when forced to change</i>
Alternative 3	ROM Cost	Risk
	\$0 - \$0	

**Conclusions:**

1	Complete Alternative 1 to meet all the requirements while staying in budget, scope and costs.
2	
3	
4	

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**Recommendation:**

Alternative 1 will provide the CalSOAP regions with a central system that CSAC can access. It will allow for universal functionality and canned reporting functionality. CSAC currently used Oracle and has skilled Oracle programmers. This will reduce the overall enhancements costs that each region currently pays a vendor. CSAC will share servers, stored procedures and skills in developing thsi solution. This solution will assist CSAC in managing and monitoring CalSOAP transaction at each region.

### Project Approach *(if known)*

<b>System Complexity:</b>		System Business Hours: <i>(e.g., 24x7, 9am-5pm)</i> :			
Architecture	<input type="checkbox"/> Mainframe	<input checked="" type="checkbox"/> Client Server	<input checked="" type="checkbox"/> Web Based	Num. of New Databases:	existing
Technology	<input checked="" type="checkbox"/> New	<input checked="" type="checkbox"/> New to Staff	<input checked="" type="checkbox"/> In-House Experience	Interfaces:	External
Implementation	<input checked="" type="checkbox"/> Central Site	<input type="checkbox"/> Phased Roll-out		Num. of Sites:	1
M & O Support	<input type="checkbox"/> Contractor	<input type="checkbox"/> Data Center	<input checked="" type="checkbox"/> Project	<input checked="" type="checkbox"/> In House	
Procurement Approach: Procure the mail room hardware and software including maintenance and any technical support via CMAS. Hire mail room staff to perform the duties.				Number of Procurements:  1	
Open Procurement?	Yes	Delegated Procurement?			
Scope of Contract	<input type="checkbox"/> Development	<input type="checkbox"/> Implementation	<input type="checkbox"/> M & O	<input checked="" type="checkbox"/> Other:	Mail room equipment
Anticipated Length of Contract:	3	Years /	extensions for	years	