

# 1 INTRODUCTION

This Section provides an overview of the *Project EASI/ED (Easy Access for Students and Institutions/ United States Department of Education) System-Wide Design Standards Document*. It describes the purpose of the document, gives background information on Project EASI/ED and other related modernization initiatives, lists related documents, and describes the organization of the document.

This Section comprises the following subsections:

- Subsection 1.1 Overview
- Subsection 1.2 Document Purpose
- Subsection 1.3 Relationship to Other Documents
- Subsection 1.4 Document Organization

## 1.1 Overview

ED's Office of Student Financial Assistance Programs (SFA) became the U.S. government's first Performance-Based Organization (PBO) through last year's reauthorization of the Higher Education Act. SFA has since embarked on a modernization effort to transform itself into a truly customer-focused and performance-oriented organization. This modernization effort will improve service to customers and partners while efficiently managing program costs and making better use of information technology (IT).

While SFA's modernization initiative encompasses the entire operations of the PBO, a key component of the initiative is the reinvention of the processes and systems that support the delivery of student financial assistance. It is in this area that Project EASI/ED supports SFA's overall modernization goals. Project EASI/ED is the Department's initial effort to implement the Project EASI vision within its own systems and processes. Project EASI itself is an effort by members of the postsecondary education community to define and to implement a customer-focused "system" to support postsecondary education.

The Project EASI vision encompasses the entire postsecondary education community and its current customers. This includes prospective students, families, students, borrowers, schools, lenders, secondary markets, servicers, guarantors, state agencies, ED, professional organizations, and external organizations that may wish to share appropriate information (e.g., employers, financial counselors). Project EASI/ED encompasses ED's internal areas of responsibility as they relate to the overall vision, as well as ED's interactions with the postsecondary education community.

A major first step in SFA's progress towards modernization is the development of an SFA Modernization Blueprint (the Blueprint). The Blueprint will define a target IT architecture for SFA and will include a detailed strategy for implementing that architecture. Version 1.0 of the Blueprint will be completed on September 30, 1999. Existing and ongoing Project EASI/ED work, including this document, is being leveraged in the development of the Blueprint to ensure the continuity of SFA's modernization plans with the Project EASI vision.

## 1.2 Document Purpose

As the Blueprint moves towards implementation, it is anticipated that multiple, parallel development or acquisition efforts will be undertaken, utilizing multiple contractors. The purpose of this *Project EASI/ED System-Wide Design Standards Document* is to deliver a set of coordinated system-wide design requirements to ensure that design and development work undertaken by different contractors will be carried out in a consistent manner.

In addition, this document defines a single, overarching framework for the delivery of Blueprint functionality. This framework will provide a consistent set of processes and standards to ensure that all implementation efforts (acquisition of commercially provided functionality, reuse of current systems, or custom software) are well integrated with SFA's investment management, acquisition management, and IT architecture management processes.

## 1.3 Relationship to Other Documents

The relationship of the *Project EASI/ED System-Wide Design Standards Document* to preceding Project EASI/ED documents is listed below:

- *Project EASI Concept Document*, January 1997, was the baseline of the Project EASI/ED vision.
- *Project EASI/ED Business Area Requirements Document (BARD) version 2.0*, July 1997, defines the business requirements for Project EASI/ED. This document is being leveraged in the development of the Blueprint.
- *Project EASI/ED Configuration Management Plan*, December 1997, defines an SFA-wide configuration management organization and process, and is used as a source of content for the configuration management portion of Appendix C.
- *Project EASI/ED Application Services Definition Document (ASDD) version 2.0*, October 1998, defines the processes and data flows that support the Project EASI/ED business requirements. This document is being leveraged in the development of the Blueprint.
- *Project EASI/ED Logical Data Model Document (LDMD) version 2.0*, October 1998, defines the data required to support the Project EASI/ED business requirements. This document is being leveraged in the development of the Blueprint.
- *OSFAP Enterprise Information Technology Architecture Framework: Target Architecture*, March, 1999, presented a future IT architecture for SFA. This document is being leveraged in the development of the Blueprint, and is used as a source of content for the architecture management portion of Appendix C.

## 1.4 Document Organization

The *Project EASI/ED System-Wide Design Standards Document* comprises the following Sections and Appendices:

- **Section 2 - Framework for Blueprint Delivery.** This Section presents a set of processes and standards to ensure that Blueprint implementation efforts are coordinated with SFA's investment management, acquisition management, and IT architecture management processes.

- **Section 3 - Security Requirements.** This Section presents a set of SFA-wide security requirements.
- **Section 4- Performance Requirements.** This Section presents a set of high-level performance requirements for SFA's modernized systems.
- **Section 5- Interface Strategy and Standards.** This Section recommends standards to be used in the development of interfaces between SFA and its trading partners, and presents a strategy for the synchronization of information within SFA's systems.
- **Section 6- User Interface Standards.** This Section recommends standards to govern the development of user interfaces to SFA's modernized systems.

Detailed information supplementing the Sections noted above is presented in the following appendices:

- **Appendix A - Acronyms and Definitions.** Presents a full list of acronyms used in the *Project EASI/ED System-Wide Design Standards Document* and their corresponding definitions.
- **Appendix B - References.** Cites the principle references used in *Project EASI/ED System-Wide Design Standards Document*.
- **Appendix C - Framework Elements.** Provides a detailed description of the elements that comprise the Framework for Blueprint Delivery.
- **Appendix D - Technology Tools and Standards.** Provides a detailed description of the technology tools and standards presented in the Framework for Blueprint Delivery.
- **Appendix E - Access Rights Subject Area Definitions.** Describes the subject areas used in the definition of user access rights within Section 3.
- **Appendix F - High Volume and Performance-Sensitive Transaction Classes and Concurrent Usage Assumptions.** Presents details of transactions determined to be performance-sensitive in nature. This Appendix also includes assumptions used in developing concurrent user estimates.
- **Appendix G – Interface Standards.** Presents a list of the data flows identified in the *ASDD* with their corresponding recommended interface standards.
- **Appendix H - Interface Strategy.** Defines timeliness requirements for different types of information processed within SFA, and describes the approach to the selection of synchronization techniques and recommendations.
- **Appendix I - User Interface Format and Style Guide.** Defines a user interface model and navigation strategy for Web/Internet applications. Also includes a CD-ROM with a recorded demonstration of the Project EASI/ED Web user interface prototype. This clearly exhibits the format, style, and navigation strategy of the prototype Web site.