Detailed Requirements Document FSA Financial Partners Portal - Release 2

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1 Executive Summary

High-level summary of the Financial Partners Portal Project and a brief description of the purpose of this document.

Project Overview

The FSA Financial Partners channel portal will bring together, in one simple, personalized Web page all the information and productivity tools relevant to FSA's customers, employees, and partners to make informed financial aid decisions and empower financial partners to assist students. The personalized "front door" will automatically identify and distribute content relevant to each user. The portal will integrate with existing FSA sites (e.g., FMS, NSLDS, Financial Partners Data Mart, etc.), and external sites, using the ITA infrastructure. The portals will be the glue that bonds all of FSA's web services together providing a uniform starting point for channel staff and financial partners to access FSA.

The purpose of this document is to provide a high-level overview of the features, design and functionality of the FSA Portal's Financial Partners Channel.

Scope

The scope of this document will present FSA with the framework for building upon the Financial Partners portal to allow users increased access to Financial Aid information

The end result of this project will be a long-term business architecture strategy for the FSA Financial Partners Portal. Release 2 will include enhanced integration with PEPS and Data Mart and the lender payment process.

Other requirements the Financial Partners Portal will include:

- **Release 2**
  - Build Content Management Tool for Financial Partners Portal
  - Update the following portlets: headlines, calendar, community search, search, and feedback/survey
  - Add additional FSA links, content, and pages
  - Provide ability to interface with systems such as PEPS and DataMart
  - Expand community members search databases and functionality
  - Reorganize and update pages such as Contact Resources and Loan and Grant Resources
  - Build email links directly from the Financial Partners organization chart and include links to other channels' organization charts
  - Build link to Financial Partners "What's New" page
  - Provide notification of updates to interest rate information for Financial Partners
  - Provide posting/modification information for Financial Partners documents and presentations
  - Build an alert for when users leave the FSA portals and go to non-governmental websites

Business Needs

FSA's Internet channel has more than 35 web sites connected to multiple back-end systems. The FSA websites do not provide for a unifying theme or a consistent common look and feel across all sites. Financial Partners do not have one single entrance point to access FSA's Internet services; they must access multiple URLs to retrieve financial aid information. FSA web sites need a personalized starting point for Financial Partners to enter through one "front door" to access a single view of internally and externally stored content/information, application/services, business processes, and knowledge assets for every channel.

Business Problem:
- No single starting point for FSA customers
- No single view of information that can be personalized for Financial Partners
- No integration across multiple websites and systems for internal and external use
- No uniform common look and feel for FSA web site(s)
- No consistent standards and architecture
- No common customer care component across all sites

The Requirements and Design Process

The process of defining the functional and technical requirements for the Financial Partners Portal Release 2 has been a joint effort between FSA, the FFEL Community, financial aid professionals, and the Mod Partner team led by Accenture. The project team interviewed and conducted focus groups with several individuals from various groups within FSA Financial Partners Channel and external partners, to gather requirements and ideas, review design decisions, and obtain feedback.

The Project Requirements Document

The purpose of this document is to outline the business requirements for the second release of the Financial Partners Portal, which is expected on or about September 30, 2002. Future releases and/or enhancements to the system may expand upon these requirements and provide additional functionality to the system's users.

As described in the Table of Contents, this document will detail the content and functional requirements for the Financial Partners Portal.

Federal Student Aid (FSA)
Portal Rollout Project
Financial Partners Portal– Release 2

2 Functional Requirements

2.1 General Requirements

2.1.1 Window Alert for Non-Governmental Sites

Notify user when they leave the ed.gov site. Either a “disclaimer” icon or a window alert that appears whenever the user leaves the portal site to go into a non-ed.gov site will fulfill this requirement.

2.1.2 Document Posting/Modification Information

A ‘last modified’ stamp will appear next to a document each time the document is updated. Also, when a page is modified there will be a ‘last modified’ stamp at the bottom displaying the date that the modification took place.
*Note: Interwoven (or other source code control application) will be used to track when these modifications or changes are moved into production

2.1.3 Document Format Tag

Add a tag next to each document posted on the site that clearly states what format it is in (PDF, Word, HTML, etc.) Note: There will always be a 508 compliant format.

2.2 Left Navigation

2.2.1 THOMAS Link

Add a link to THOMAS (Thomas.loc.gov) on the Publications page.

2.3 Content Management

2.3.1 Content Management Tool – Interwoven

See Detailed Requirements for Interwoven.

2.4 Community Members Search

2.4.1 Data Updates from PEPS and Data Mart

Extract data for FFEL schools, Lenders and GAs from PEPS and Data Mart. Frequency and level of automation are to be determined. This data will appear when users search for information via the community search function.

2.4.2 Secondary Markets Category

Add a consolidated list of Secondary Markets to the Community Members Search. Users will be able to query for these secondary markets using the Community Locator, the Category Search, or the Alphabetical Search.

2.4.3 Search ‘ALL’ Option

In the ‘Search by Category’ section of the Community Members Search page, both drop-down boxes on the left-hand side should include an ‘ALL’ option. This allows users to either perform an alphabetical search across all the community members or perform a search by category across all community members.

2.4.4 Lender Ids and Locations

Lender IDs and locations will be added to the list of Lenders in the Community Members Search. The data needed are the City, State, and Zip. This information will be pulled from legacy systems (FMS/Data Mart) and it will be a one-time population.

2.4.5 Direct Loan Schools

Data consisting of Direct Loan Schools will be added to the Community Members Search. This information is in PEPS. There were 1700 records as of 4/26/02.

2.5 Contact Resources

2.5.1 State Contact Information

The state contacts for each region will be added to the specific regional pages. The map will remain regionally divided, but within each regional page the user will see the name of the region, the name of the Regional Director, the RD's email and phone number, the mailing address for that region, and the state contacts. The state contacts will be listed alphabetically (by state) and will include the contact's name, email, and phone number. Also, the RD's description at the bottom of the page will be removed.

2.5.2 Map Legend

On the Contact Resources Page, beneath the map, there will be a legend stating which color represents which region. This requirement is intended for 508 purposes.

2.5.3 Mail Client Hot Link on Organization Chart

When a user clicks on a person on the organization chart they will see a pop-up window with information on that individual. In that pop-up window they will see the person's name, title, location, e-mail address, phone and responsibilities. When the user clicks on the person's email link it should automatically open their default mail client with the person's email address pre-populated in the 'To' field, also known as a "mail to."

2.5.4 FSA Organization Charts

Financial Partners Organization Chart page, in addition to the chart provided, will have links to other channel's organization chart. These other organization charts will have to be recreated from the FSA Intranet because currently external users cannot access them. The organization charts that need to be recreated are Schools channels, Students channel, CFO, and CIO.

2.6 Loan and Grant Resources

2.6.1 Reorganization of Loan and Grant Resources Page

The resources listed on the Loan and Grant Resources page will have short descriptions introducing the resource.

2.6.2 Students Portal Link

There will be a link at the bottom and top of the Loan and Grant Resources Page that reads 'If you are a student looking for counseling resources or loan/grant information, please see our Students Portal at www.studentaid.ed.gov (hyperlink)"

2.6.3 Feedback Link

There will be a 'Feedback' link at the bottom of the Loan and Grant Resources page in case the community notices any critical resources that are not listed. The link will go to the following address: fpportal@ed.gov.

2.7 Publications

2.7.1 Reorganization of Publications Page

The publications listed on the Publications page need to be organized more logically. For example, all of the handbooks, the user guides, the Acronym List, the NSLDS Status Codes, and the Lender Audit Guide should be in a general “Reference Material” (Documentation) section within the Publications page. Also, the regulatory and legal information such as New Federal Registers, Dear Partner/Colleague Letters, and Electronic Announcements should be grouped within a “Regulatory and Legal Information” section on the Publications page. There should also be a “Statistics and Trends” section that contains Top 100 Originating Lenders list and the Default Rate Materials information.

2.7.2 Remove VFA Initiative

The VFA Initiative needs to be removed from the Publications page. Any information that is not already in the VFA Initiative section of the Current Activities page should be moved from the Publications page to the Current Activities page of the portal.

2.8 Counseling Resources

This page will be deleted from the portal.

2.9 Community Calendar

2.9.1 Email Link to FPPORTAL@ed.gov

There will be an email link to fpportal@ed.gov at the bottom of the Community Calendar page so community members can inform the team of new entries.

2.10 FMS

2.10.1 User Buttons

There will either be FMS ‘user buttons’ added to the top of the FMS page (in addition to the user buttons that are already at the bottom of the FMS page) or the scrolling will be minimized such that the users can see the existing ‘user buttons’ (at the bottom of the FMS page) without scrolling down.

2.11 Interest Rates

2.11.1 Flag New Interest Rate Information

Whenever new Interest Rate information is posted, the user will be notified on the 'What's New' page and in the 'Interest Rates' box on the home page.

2.12 Search/Advanced Search

2.12.1 Department of Education Link

There will be a link to the Department of Education at the bottom of every Search/Advanced results page. There will also be text explaining to the user 'If you have not found what you are looking for, you can also try searching the Department of Education's website at www.ed.gov'

2.13 What's New Page

2.13.1 News, Posting, and Announcements

There will be a new page created on the portal called the 'What's New' page. This page will contain only recent news and/or postings (i.e. new forms, meeting minutes, presentations, announcements.) This page will be as dynamic as often as the page is updated.