

Professional Service Catalog

Harris SME

Summer/Fall 2009

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Harris Education, Inc. offers a wide variety of services to help you leverage your SchoolMAX student information system investment whether you are on our Enterprise (SME) or Legacy (SchoolMAX) product.

We are offering several core services for both our Enterprise and Legacy customers, and our "Software for Life" policy provides our customers with great options going into the 2010 school year:

Legacy Upgrade – If you plan to stay on the Legacy SchoolMAX product for the next few years you will need to consider our Legacy Platform Upgrade option. With this option you may upgrade to the latest server operating systems and databases (Oracle or MS SQL server). This may be the time to install new hardware as well. The platform upgrade cutover can typically be accomplished in one weekend, with more time required for larger districts, and the great news is that the application will be exactly the same on the new platform. There is little or no impact on district users. Aside from the upgrade itself, this is a great time to consider staff refresh training, database health audits and custom reporting or application enhancements.

Migrate to SME – SME is gaining momentum and now is the time to start planning for a summer 2010 or 2011 go-live. If you are considering upgrading within this timeframe, we recommend getting started this fall with transition planning and data cleanup, or to take advantage of our SME Pilot option.

Cores Services – Both SME and SchoolMAX offer a wide range of configuration options, third party software integration, custom reporting opportunities and enhancements. From a services perspective the "Software for Life" policy allows us to focus on assisting our customers in continuing to shape the applications to meet changing district needs.

Our sales team and I are working together to help districts determine services and platform decisions that best fit each district. Please contact your designated sales representative or me for more information.

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TRAINING & CONSULTING

Our training and consulting services focus on helping districts leverage their investments in SME and SchoolMAX. Both applications provide several configuration options and approaches to using each module, and there are several modules. Most of our districts use portions of the application but not every module or feature. Subsequently, we approach training and consulting requests by trying to understand the business processes that are used by the district. In this way we target our efforts on addressing topics that are most applicable to the users that are being trained and the processes that have been defined by the district.

At times additional training is needed due to staff turnover and at other times it is needed in order to reinforce understanding on particular modules or to prepare for using modules that the district or schools haven't used before. Most training sessions can be conducted remotely via Web Ex, in which case sessions are usually planned for two to three hours at a time. If multiple sessions are required they are scheduled in such a way to best accommodate the trainees' schedules. Onsite training is often preferred for complex subjects like scheduling and YEP.

While we offer training and consulting on all aspects of SME and SchoolMAX, the following list of training classes describes the most popular topics:

State Reporting Configuration, Data Entry and Validation

This training focuses on making sure on a module by module basis that the configurations are properly set for capturing state reporting data, making sure users are trained on how to enter data properly for state reporting and how to use reports and queries to validate data during submission times. Often particular modules are focused on for particular audiences. For example, sessions can be focused on Census and Enrollment for registrars, Scheduling for counselors, etc.

Master scheduling Parts I and II

Part I covers scheduling preparation steps (ex. calendar creation, New Year Enrollment, Copying scheduling versions and course requests). Part II covers Course and Section balancing, setup for running the scheduler, reviewing scheduling results and walk-in scheduling. Part II is often split for the particular audience based on school type (ex. elementary, middle/jr. high, high).

Leveraging the User Interface Tools of SME

One of the powerful aspects of SME is the set of built in tools for modifying the user interface and configurations to meet district business practices. This training explores the UI Customization tools, Flex Fields, Security management and other options for customizing the look and feel of SME for your users.

How to Configure and Rollout Those Modules You Aren't Using

Graduation Standards, Programs, Parent Access, Online Course Registration, Counseling, Textbooks, Fees and Student Groups are some of the many modules that are available in SchoolMAX and SME that your district may not have rolled out yet. This training reviews the districts goals for using a module, goes over the available configuration for the module (if appropriate sets the configuration) and develops a rollout plan including how to prepare users for the change.

Grading and GPA configuration

Schools tend to change strategies for grading and GPA calculation from time to time, which affects report cards, honor rolls and transcripts. This training reviews the goals and policies a district or school has for grading and examines configuration settings to ensure they match and produce the intended outcomes.

iParent/Family Portal Management

This training is focused on preparing for and rolling out either iParent or the Family Portal and security maintenance.

Teacher Tools

Every year, and even on a term by term or grading period basis, teachers need to understand how to take attendance, configure their gradebooks, publish or enter grades and how this information impacts report cards and Parent viewing if enabled. Teacher Tools training can either be geared toward teachers themselves or district trainers who support teachers using Teacher Tools.

Intro to Database Querying

While SchoolMAX and SME are advanced database systems with vast numbers of fields for data storage, most requests for custom reporting and data extracts from district users fall into common categories (ex. census/enrollment, grades, scheduling, attendance, etc.). The Intro to Database Querying training focuses on using commonly available and inexpensive (or free) tools like MS Access and Oracle SQL Developer to connect to the SchoolMAX and SME databases and to create SQL queries for common user data requests. In addition to learning basic querying skills, users learn valuable insights into how the application and database are constructed which is essential to successful query building.

Advanced Database Querying

Many users are already familiar with the SchoolMAX and SME databases and are proficient in building SQL for common reporting requests, so Advanced Database Querying delves into more complex joins, dependencies and techniques. The sessions are customized for each audience and to focus on specific customer objectives.

Custom Report Development

There are two aspects to Custom Report Development, one is establishing the SQL needed in order to gather the data for a report and the second is manipulating the report development toolset for presentation and distribution of the report. This training assumes that trainees are prepared to develop the necessary SQL and therefore focuses on leveraging the reporting toolset for data presentation and report distribution. Trainees are encouraged to bring examples of reports that they would like or need to create.

- Pentaho Ad-hoc (web-based)
- Pentaho Basic
- Pentaho Advanced
- Pentaho Data Model Editor

Helpdesk Trouble Shooting Tips and Tricks

Understanding how to quickly and efficiently investigate, document and resolve user issues is paramount to keeping your users productive and your data accurate; however, resolving issues quickly also requires in-depth knowledge of the district's business practices, configurations and the way the application functions with them. This training centers on best practices for performing helpdesk support and reviews the intricacies of the application to help your support staff understand better diagnose and resolve user issues.

Keeping the servers running

For self-hosted customers making sure that servers are operating at maximum efficiency, backup strategies are followed and tested and routine maintenance is carried out are paramount to keeping the application up and running. This training focuses both on proper startup, shutdown and monitoring practices as well as best practices for routine maintenance.

How to Perform Application upgrades

Most self-hosted SchoolMAX districts are proficient at performing application upgrades, but refreshing this knowledge is helpful. For SME the environment is different and upgrades require a different set of procedures. Like the procedures for SchoolMAX, once an administrator has done it a couple of times it becomes routine. This training focuses on the procedures and best practices for performing application upgrades on either SchoolMAX or SME.

APPLICATION USAGE ASSESSMENT

We find in many districts that some practices or configurations were set during the initial conversion to SchoolMAX or SME and have never been reviewed or changed to make sure the application is configured to best serve the needs of the district's users. The Application Usage Assessment provides a review of how well the district is using the application and outlines a strategy for improving productivity and application utilization.

Scope

- Review the current business processes from a high level
- Perform a hands-on "Day in the Life" review of your business processes on selected modules
 - Key users/procedures
 - Issues/challenges
 - Manual tasks/automated tasks
 - Daily, weekly, monthly, yearly processes
- Review configuration and setup
- Review the parameters of your setup:
 - What function each parameter serves;
 - How it affects the system; and
 - What the options are.
- Review unused options and benefits
- Produce assessment report
 - Document findings and recommendations
 - Research major issues and determine a recommended course of action
- Follow-up telephone review of assessment report (if required):
 - Review the issues and recommended course(s) of action as outlined in the assessment report

SME PILOT

The SME Pilot is a low cost way to experience your district's data in the SME product. If you decide to move forward with a full implementation, the work performed for the pilot is credited toward the full implementation plan.

Scope

- Obtain a copy of the district's SchoolMAX database
- Convert the database to SME
- Provide secure SSL encrypted access to the converted SME database
- Four days (4) of on-site introductory training on SME
- 90 days of hosted ASP access to the converted SME instance

DATABASE MAINTENANCE AND HEALTH CHECKS

Most of our customers have solid database querying skills in house; however, not many districts can afford to have a DBA on staff to properly maintain the database.

Scope

- Conduct initial database health check
 - Establish a baseline review of the database
 - Provide a report of health status and recommended actions
 - Execute agreed upon actions
- Following the initial health check and cleanup, conduct monthly or quarterly health checks and cleanup

TECHNICAL SERVICES/UPGRADE SERVICES

Many of our districts perform their own server maintenance and application upgrades; however, another consideration is setting up a block of server administration time with Harris for doing server side maintenance and application upgrades. This is different than the DBA health checks, which only apply to the operational database, but we welcome structuring plans to accommodate both.

Scope

- Verify installed components
- Perform system health check
- Review backup and recovery mechanisms
- Perform application upgrades when new versions and patches are released

CUSTOM REPORTS/SQL QUERIES/INTERFACES

Creating custom reports from either SME or SchoolMAX requires both an understanding of how to structure and format reports and how to effectively create the SQL necessary to query the data needed to feed the reports. Harris has highly skilled report designers and database programmers who can build custom reports for use in your environment or assist you in creating SQL needed for reports that you have designed. In addition, we also have several methods for creating interfaces to third party systems. The approach we use depends on the requirements for frequency of updates.

ENHANCEMENTS

Harris monitors customer feedback and support information to determine priorities for ongoing improvements to our products; however, occasionally districts have specific features that they would like to add to the application in order to fulfill a business process need. Districts may request enhancements individually or in conjunction with other districts.

OUTSOURCED SIS MANAGEMENT

Need an extra pair of hands? Sometimes high turnover or temporary skill shortages can leave your district and your users without the manpower to run your SIS effectively. Also, at critical times, like at the start of school or during peak scheduling season you may need to augment your staff with additional resources without the cost of hiring additional full-time staff.

LEGACY PLATFORM UPGRADE

The Legacy Platform Upgrade extends the lifespan of the SchoolMAX Legacy product by moving the operating environment from non-supported third party applications to a fully supported platform. There is no change in software functionality, which makes this upgrade a very cost effective solution for extending the useful life of the application in your district. Your sales representative will provide you with the pricing for the upgrade and will provide our standard recommended hardware specifications.

Scope

- Planning and scheduling review – this is a conference call to review the hardware to be used, any third party components that need to be addressed and to verify the installation dates
- Backup existing Oracle 8i database
- Extract LINC data
- Partition hard drives

- Install Windows Server 2008 (Database: Windows Server Standard or Enterprise 2008 based on memory (32GB Standard 32+GB, Enterprise) Application Server(s): Windows Standard Server 2008; Web Server(s): Windows Web Server 2008)
- Install Oracle 11g or MS SQL Server 2008
- Install application and web tier servers
- Install Info Driver
- Configure Enterprise Output Manager (replaces Depcon)
- Import data into new database
- Complete readiness checks and installation checklist
- Conduct training on supporting the new environment

Optional Services

- Existing hardware viability review/capacity planning consultation
- Un box and rack new hardware
- Consult on backup strategy/configure backup solution
- Additional upgrade training (work side by side with one of our technicians during your next upgrade)

District Responsibilities

The goal for the upgrade is for it to be as turnkey as possible. However, the district will be responsible for providing the following:

- SSL Certificates from the district's preferred vendor (existing certs may be re-used)
- Network connectivity must be in place for the servers that will be installed or re-purposed
- All backup hardware and software (by default we will configure a full db backup to occur nightly to disk)
- All power and environmental server requirements
- Un box and rack new hardware if Harris is not contracted to do so
- Verify all custom reports are functional after upgrade

BUDGETING OPTIONS

Typically our services are offered a la carte on an hourly or daily basis. However, we recognize that it is often difficult to predict district needs for training or services, and as IT and professional development budgets get squeezed it is helpful to be able to budget for services in a block for the full year. Our maintenance cycle starts July 1 and runs to June 30, so in conjunction with renewing your maintenance contract we offer service blocks of time. Time blocks can be in any increment you need with discounted rates applying to blocks of 100 hours or more. Each month in which you use time from the block you will receive a statement indicating what you have used and what funds remain for that maintenance cycle.

Scope

You name it. The scope can be as simple as an 8 hour block of time for remote training or it can cover a flat rate for any services you might need including custom reporting and interface development.

STANDARD RATES

Training/Application consulting	\$150/hr. or \$1200/day
Server/Admin/DBA Technical	\$175/hr.
Project Management	\$200/hr.