Resnick Alumni Tracking System

Prepared By:

David Fiel

Aditi Rao

Jeremy Shaughnessy

Joseph Michel

Theodosios Bligiannos

Client:

Resnick Academic Support Center for Student-Athletes

Contact: Alyssa Draschlin

Statement of Work

Overview/Executive Summary

The Resnick Academic Support Center supports student athletes with various support services such as supporting academic success, tutoring programs, proactive mentoring, and career development in a welcoming physical setting. The center stores and tracks information on student athletes as they become alumni using a manual system for alumni tracking. The Center actively engages their student athletes' alumni and wants to make sure to keep them engaged with the Center and Temple University post-graduation. They track the alumni careers, invite them to events, and ask them to participate as mentors and speakers to the current student athletes.

Current System

What are they doing now?

The current Student Athlete Alumni Tracking Process uses an Excel Spreadsheet with information on alumni, which is shared by several employees in the Resnick Center.

The current spreadsheet tracks alumni information on TUID, Name, Major, Sport, Graduating Year, Temple Email, Personal Email, Phone Number, LinkedIn profile and active status, Current Employer, Current Position, and Additional Email/Phone.

What is done manually?

The tracking information of each alumnus is entered manually by a Resnick Center employee or intern.

Emailing for updated information and event coordination is also done manually by the Resnick staff.

What is automated?

Nothing is currently automated.

What current websites are related to this project?

There are no related websites currently, but the Center does use LinkedIn to help in the manual tracking process for career information.

Who would use the system?

The system is used by the Resnick Center Office Staff, and Temple employees only.

System Goals

The goal for automation of the Resnick Center Alumni Tracking System is to provide a new system to track important alumni information, regarding their academic, demographic, and career information. This system will allow Resnick Center employees to edit alumni information and keep a record of alumni demographics, sports played, major program, and employment history. Additionally, the system will allow for the entry of notes on an alumnus' profile. The newly organized interface should optimize tracking and communication processes and should be accessible to interns and other Temple employees.

System Users

Standard User – Access the Alumni Tracking System to view and edit Alumni information

Administrator – Abilities of Standard User, as well as designating permissions for AccessNet accounts

Scope of Work

Definition of Users

Ability for an Administrator to manage the employees who will have access to the system and restrict access to the system to only authorized accounts

Alumni Profile

Ability to enter information about student athletes, including:

TUID

Name

Major

Degree

Sport played

Graduating Year

Temple Email

Additional Email

Residing City & State

Number of Semesters completed at Temple

Transfer Status

Last Advisor Contact

Phone Number

LinkedIn profile URL & Activity Status

Ability to update an individual Alumnus profile manually in the system

Ability to maintain multiple data points for an Alumnus' employment, sport played, education information

Ability to maintain notes associated with an alumnus for future reference

Ability to download alumnus profile as a PDF file

Alumni Identification

Ability to search and filter for a student alumnus, based on information such as major, graduation term, or industry.

Student Athlete Alumni Data Conversion

Ability to import data from current spreadsheet system into the new system

Ability to import student athlete graduation data at the end of every semester

Ability to download alumni information via Excel file so they can be contacted for future events

Possible Future Features

Embedding of LinkedIn profile for ease of access

No automated scraping of LinkedIn Information

Event Tracking

Ability to create alumni events Ability to manually associate specific alumni to events as prospective attendees and track RSVP status

Ability to track alumni engagement in events through the system

Ability to manually search and match alumni to an event through the system

Ability to filter alumni profiles based on prior engagement, industry, sport, played, or graduation year

Expected Benefits

A more organized system than the current Excel spreadsheets, making it easier to search and track alumni information

Increase efficiency due to ease of use

Access Controls – reduces risk of data being accessed and modified by unauthorized users

Effect of Time in Proposed System

Information will be updated every semester end with the information of students that applied for graduation

Data can be modified as needed to update alumni information in the future

Project Timeline

Analysis Phase (semester 1):

Project Team will provide Client with various requirements gathering and analysis documents throughout the entire semester. Client will review all documents, and answer questions in a timely basis

Each document will further define the requirements of the system

Design Phase (semester 1):

Team will move from analysis to design, building screens and other user interface items. Client will review all documents and provide feedback

Build Phase (semester 2):

Team will work in 3 iterations, or sprints, to develop the software

Client will review the software and be required to devote time to testing after each phase

Teams will also test via a defined Quality Assurance and Testing Plan

Implementation Phase (semester 2):

Team will fully document the system via a User Manual and a Support Manual

Team will move the software from development to QA, to a production environment

Team will train main users

Client will sign off

Activity Diagram

Use Case Diagram

User Stories

Data Model

User Interface

Login Page

This is the login page, where a user enters their AccessNet username and password to access the Alumni Tracking System.

Alumni List Page

This page is the central list of imported alumni to the database where admins can filter or manually search for certain alumni based on either keyword or filters. The filtering for TUID, First and Last Name, Year, and email will be done via text entry. The sport and major filters will be dropdowns to pick from a list of sports or majors respectively. Engagement status will have its own filter dependent on survey results. The clear button in the top right of the window will reset the filters and/or manual search. The export button will download the current search as a spreadsheet. The buttons on the bottom right of the window manipulate the data onto different pages.

View Alumnus Dialog

This screen is displayed in front of the alumni list upon selection of an alumnus as well as after the creation of a new alumnus profile. From this screen, all the fields of an alumni profile can be viewed and edited, with the exception of TUID and Temple Email, which are read-only fields. Education records, sports played, employment history records, engagement survey results, and notes for an alumnus are displayed inside of collapsible sections, where a user can add and view the respective information.

View Alumnus Dialog – Information Sections

These sections allow for the user to view and add entries for education, sports played, employment history, engagement results, and notes to an alumni profile

Create Alumnus Profile Page

This page allows the user to manually create a new alumnus profile in the system. The user can enter all fields for an alumnus profile, with TUID, First Name, Last Name, Temple Email, and Graduating Year

being mandatory. Education, Sports Played, Employment History, Engagement Status, and Notes are added in the View Alumnus Dialog, which the user will be redirected to after the creation of the profile.

Upload Graduate List Page

This page will allow the user to upload graduates using the template provided on the page. The user can either drag and drop the file they want to upload, or they can select it. There is an upload log at the bottom of the page that will show you which files have been uploaded successfully.

Upload Alumni Data Page

This page will allow the user to upload an alumni profile using the template provided. The user can either drag and drop their file or select it. The upload log at the bottom will show what has been uploaded successfully.

Initial Spreadsheet Conversion

This page will be responsible for the initial spreadsheet conversion. The user will be able to drag and drop the file or click to select the file. The user will then click the upload button and it will upload each person existing within the file. The upload log at the bottom will show what has been uploaded successfully.

User Role Assignment (Admin) Page

This page allows an administrator user to view the collection of allowed system users that displays their AccessNet Username, First and Last Name, and defined role type. The administrator will have the ability to edit another user's role type allowing them to add or remove admin privileges from any user. The administrator will also have the ability to delete a user or add a new user to the system.

Add/Edit User Dialog

This page is the pop-up dialog box that appears when the "Add User" button or the "Edit" button is clicked from the User Roles Assignment page. It allows an administrator to enter a user's AccessNet Username, set their role type, and set their active status. Once an AccessNet Username is entered the first and last name of that user will populate below the form. When the administrator clicks the "Save" button the new user will be added to the system and their AccessNet Username, First & Last Name, and defined role type will be displayed in the table on the User Roles Assignment page.

Validation Table (Admin) Page

This page lists all the validation tables in our system in the left navbar. When a validation table is selected in the navbar, the table content will appear on the right. Here, an administrator will be able to edit and add data entries in the validation table. A validation table stores the accepted entries for a data point (college, sport, industry, etc.), and these tables are checked when new alumnus profiles are created through the upload of a spreadsheet. If a spreadsheet contains data for an alumnus that does not exist in the validation table, then the import for that specific alumnus will fail.

Validation Table - "Add" Pop-Up

After clicking the "Add Entry" button for a specific validation table, this pop-up page will load. Here an administrator will be able to add and save new data entries or click cancel to close the pop-up.

Validation Table - "Edit" Pop-Up

After clicking the "Edit" button for a specific row in a validation table, this pop-up page will load. Here an administrator will be able to edit and save the data entries that are currently in the table row or click cancel to close the pop-up.

Traceability Matrix

Meeting Agendas and Meeting Minutes

Meeting 1 Agenda

Objective of Meeting:

Discuss the current process being used by the Resnick Academic Support Center to store and track information on student athletes as they become alumni and gather requirements for the design of the new student athlete alumni tracking system.

Meeting Date: Thursday, September 8th, 2022

Meeting Time: 04:00PM EDT

Meeting Location: Resnick Academic Support Center, Pearson Hall

Client Participants

Alyssa Drachslin, Coordinator for Leadership and Professional Development

Email:

Project Team Participants, Roles, and Contact Information

David Fiel, Client Contact, Meeting Leader

Email: Cell: (215) 526 – 3677

Aditi Rao

Email: Cell: (267) 992 – 7050

Jeremy Shaughnessy, Note Taker

Email: Cell: (570) 899 – 2876

Theodosios Bligiannos, Note Taker

Email: Cell: (267) 438 – 5346

Joseph Michel

Email: Cell: (717) 424 – 1797

Interview/Discussion

Can you tell us what you're currently doing to track the student athlete alumni?

Which parts of the process do you feel are successful?

Which parts create the most issues?

Who from the Resnick Center accesses this spreadsheet and what are the responsibilities of each individual persons?

What information is currently being tracked in the spreadsheet?

What specific personal information do you gather on each alumni to properly identify them (ex. full name, TUID, email addresses)?

What type of demographic information do you focus on?

How is the spreadsheet updated?

Where is the information sourced from?

What aspects of the current spreadsheet are functioning properly?

What aspects of the current spreadsheet need improvement?

Could you walk us through the process of notifying alumni about an event?

Is it a single person manually sending out emails?

How do you determine which specific alumni to contact for a certain event?

What information is most important to consider: the sport they played, their major, their career, professional activity, graduation year, or something else?

How do you track the alumni's engagement with Temple?

Do you keep track of participation, number of Alumni events attended, response time, number of interactions, and number of Temple connections?

How do you track their career activity and how often do you update this?

What is the end of semester process for updating the alumni information?

Where is the information sourced from?

What format is it in?

What types of communications with alumni will be recorded with this system?

Are you looking for a log of communications sent from the Alumni Tracking System?

Or a space to be able to add comments/notes to an alumni's "file"?

Meeting 1 Minutes

Meeting Date: Thursday, September 8th, 2022

Meeting Time: 04:00PM EDT

Meeting Location: Resnick Academic Support Center, Pearson Hall

Attendees: Alyssa Drachslin, David Fiel, Jeremy Shaughnessy, Theodosios Bligiannos, Joseph Michel

Summary of Developments:

This meeting served to discuss the current process being used by the Resnick Academic Support Center to store and track information on student athletes as they become alumni and gather requirements for the design of the new student athlete alumni tracking system.

Current System for Alumni Tracking

Completely manual process

Tracks TUID, Name, Major, Sport, Graduating Year, Email, Phone Number, LinkedIn profile and active status, Current Employer, Current Position, and Additional Email/Phone

Stored in a number of disconnected excel spreadsheets

Only praise is that its information is accurate

Slow updating process, leading to stale information.

Information is updated from the Alumni Survey, Temple's Banner system, the Athletics Teamworks software, and LinkedIn

New System Requirements

The system shall track alumni data as well as alumni events

Alumni are selected for events based on prior participation, industry, sport played, age range, or are selected manually

Alumni engagement/participation is not currently tracked but shall be by the new system

New alumni shall be added to the system based on the report of students who apply to Graduate

Communications with alumni shall be sent through the system and recorded for later review

The system shall allow for the addition of notes to an alumnus' profile

The new system shall be able to be accessed by interns and other temple employees.

The new system shall allow for the storage of multiple data points for employment and education records in an alumnus profile

Follow-Up on Action Items from Previous Meeting: Confirm list of data points to be stored and tracked

New Topics and Materials to Discuss:

Differences in Transfer Graduates vs Typical Graduates

Next Meeting Topic: Reviewing Statement of Work and Activity Diagram

Next Meeting Date, Time, and Location: Thursday, September 22nd at 4pm EDT in Resnick Center (Pearson 105)

Meeting 2 Agenda

Objective of Meeting:

Review the Statement of Work and Activity Diagram to ensure the alumni tracking process has been completely documented, document the differences between a transfer student versus a standard student, and confirm the list of alumni data points to be stored.

Meeting Date: Thursday, September 22nd, 2022

Meeting Time: 4:00PM EDT

Meeting Location: Resnick Academic Support Center, McGonigle Hall

Client Participants

Alyssa Drachslin, Coordinator for Leadership and Professional Development

Email:

Project Team Participants, Roles, and Contact Information

David Fiel, Client Contact

Email: Cell: (215) 526 – 3677

Aditi Rao, Note Taker

Email: Cell: (267) 992 – 7050

Jeremy Shaughnessy, Meeting Leader

Email: Cell: (570) 899 – 2876

Theodosios Bligiannos, Note Taker

Email: Cell: (267) 438 – 5346

Joseph Michel, Note Taker

Email: Cell: (717) 424 – 1797

Interview/Discussion

We have a few things we want to discuss in relation to our last meeting:

We discussed a number of data points to be collected by the system. We would like to confirm them with you, and ensure there isn't anything we missed, or that we currently have but do not need.

TUID, Name, Major, Sport played, Graduating Year, Email, Phone Number, LinkedIn profile URL & Activity Status, Education, Current & Past Employers & Positions

You mentioned wanting to be able to filter Alumni based on age range, but date of birth is not currently in the list of information to be tracked. Should we plan to track this information, or is that information unnecessary?

You mentioned there may be differences in the information needed to be tracked for transfer alumni vs typical alumni. Can you share more information about the differences between these two cases, if any?

We have produced a Statement of Work for this project. It provides an overview of the project, a description of the new system's goals, a detailed scope of work, possible future features, expected benefits, and a project timeline. We will walk through this document.

We have produced an Activity Diagram for this project as well. It provides an outline of the decision flow for the different actions associated with the prospective tracking system. We will walk through this document.

Meeting 2 Minutes

Meeting Date: September 22, 2022

Meeting Time: 4:00pm EST

Meeting Location: Resnick Academic Support Center, Pearson Hall

Attendees: Alyssa Drachslin, David Fiel, Jeremy Shaughnessy, Theodosios Bligiannos, Joseph Michel, Aditi Rao

Summary of Developments:

During our second meeting with our client, we cleared up topics of interest that both Alyssa and we have about the project:

DOB is not needed, graduation year is fine

Transfer vs. Typical Alumni

Manual input of transfer of number of semesters (if desired)

Boolean to indicate if they were a transfer student

Data points needed to be added:

Current residing City & State

Industry

Alyssa provides the list of industries, wants to know if list of industries can be edited

Semesters completed at Temple

Last advisor contact information

System roles are fine, no restrictions on regular users as opposed to the admin

Filtering based on present employer vs past & present employers

Follow-Up on Action Items from Previous Meeting:

Confirmed list of data points to be stored and tracked

New Topics and Materials to Discuss:

Example Cognos report for end of semester upload process

Next Meeting Topic: Review User Stories, Use Case Diagram and discuss your user interface

Next Meeting Date, Time, and Location: TBD

Meeting 3 Agenda

Objective of Meeting:

Review the User Stories, Use Case Diagram, and discuss the user interface. We would also like to discuss what kind of data will be pulled from an end of semester Cognos report.

Meeting Date: Thursday, October 13th, 2022

Meeting Time: 4:00PM EDT

Meeting Location: Virtual, Zoom Link:

Client Participants

Alyssa Drachslin, Coordinator for Leadership and Professional Development

Email:

Project Team Participants, Roles, and Contact Information

David Fiel, Client Contact

Email: Cell: (215) 526 – 3677

Aditi Rao, Note Taker

Email: Cell: (267) 992 – 7050

Jeremy Shaughnessy

Email: Cell: (570) 899 – 2876

Theodosios Bligiannos, Note Taker

Email: Cell: (267) 438 – 5346

Joseph Michel, Meeting Leader

Email: Cell: (717) 424 – 1797

Interview/Discussion

We have one thing we want to discuss in relation to our last meeting:

We would like to see an example of a Cognos report to see what data will be pulled from it and how we will format the data for the end of semester upload process.

We have provided the Use Case Diagram for this project. This gives us a look at what parts of the system users will interact with and the actions they can take. We will walk through this document.

We have provided the User Stories for this project. These stories represent every action our system would need to perform for each system user. We will walk through this document

Meeting 3 Minutes

Meeting Date: Thursday, October 13th, 2022

Meeting Time: 4:00PM

Meeting Location: Virtual, Zoom

Attendees: Alyssa Drachslin, David Fiel, Theodosios Bligiannos, Joseph Michel, Aditi Rao

Summary of Developments:

During our third meeting with the client, we reviewed the User Stories and Activity Diagram, as well as received copies of the Graduate Application list and the Alumni Survey results.

Use Case Diagram and User Stories look good

Add data from Alumni Survey to alumni profile

Include in filtering

Include in data conversion process

Add to User Stories

Add to Statement of Work

Graduate Application list will be uploaded to load graduate info

Separate template upload to update data and add manual fields

Alumni Survey currently on Google Forms

Will be moved to a different system in the future

Follow-Up on Action Items from Previous Meeting:

Received copy of the Graduate Application list and the Alumni Survey results

New Topics and Materials to Discuss: N/A

Next Meeting Topic: Review Data Model and UI Mockup

Next Meeting Date, Time, and Location: TBD

Meeting 4 Agenda

Objective of Meeting:

Review the data model alongside the user interface documents.

Meeting Date: Tuesday, November 1st, 2022

Meeting Time: 3:00PM EDT

Meeting Location: Virtual, Zoom Link:

Client Participants

Alyssa Drachslin, Coordinator for Leadership and Professional Development

Email:

Project Team Participants, Roles, and Contact Information

David Fiel, Client Contact

Email: Cell: (215) 526 – 3677

Aditi Rao, Meeting Leader

Email: Cell: (267) 992 – 7050

Jeremy Shaughnessy, Note Taker

Email: Cell: (570) 899 – 2876

Theodosios Bligiannos, Note Taker

Email: Cell: (267) 438 – 5346

Joseph Michel, Note Taker

Email: Cell: (717) 424 – 1797

Interview/Discussion

We have one outstanding topic we want to discuss from our last meeting:

We would like to review the data from the Alumni Survey sent via Google Forms. Our data model will be influenced by this data, as will our UI

We have designed a mock User Interface for the system. This provides a general idea of the look and feel of the system, and outlines most of the pages and data fields that make up the system. We would like to review every page of our mockup for your comments

We have designed a Data Model of the proposed system. This model is a diagram listing all of the different data elements of the system, their associated data points, and the relationships between entities. We would like to review all entities to ensure we have captured all the necessary data.

Meeting 4 Minutes

Meeting Date: Tuesday, November 1st, 2022

Meeting Time: 3:00PM EDT

Meeting Location: Virtual, Zoom

Attendees: Alyssa Drachslin, David Fiel, Jeremy Shaughnessy, Theodosios Bligiannos, Joseph Michel, Aditi Rao

Summary of Developments:

During our fourth meeting with the client, we reviewed the Data Model, User Interface mockup, and the Alumni Survey results.

Figma UI and Data Model both look good

Filtering by TUID and email can be removed from alumni list

Sport ID will be three letter abbreviation

Degree code needs to be implemented instead of degree ID

IDs should be hidden on the following Validation Tables:

LinkedIn Activity

Industry

Institution

Degree

Potential Data Issues

For the survey, TUID is not a reliable key since people don't always remember it

Continuing Studies alumni, not sure how to handle

Need to determine what platform the Alumni Survey will use for the future

Follow-Up on Action Items from Previous Meeting:

Received copy of alumni survey results

New Topics and Materials to Discuss:

How to match survey results without TUID to Alumni profiles

How to define Major IDs for alumni

Determine what platform the Alumni Survey will use for the future

Next Meeting Topic: Review of System Prototype and Updated Data Model

Next Meeting Date, Time, and Location: Thursday, November 17th, 2022 at 4:00PM EDT, Zoom

Meeting 5 Agenda

Objective of Meeting:

Review the User Interface prototype as well as the updated Data Model.

Meeting Date: Thursday, November 17th, 2022

Meeting Time: 4:00PM EDT

Meeting Location: Virtual, Zoom Link:

Client Participants

Alyssa Drachslin, Coordinator for Leadership and Professional Development

Email:

Project Team Participants, Roles, and Contact Information

David Fiel, Client Contact

Email: Cell: (215) 526 – 3677

Aditi Rao

Email: Cell: (267) 992 – 7050

Jeremy Shaughnessy

Email: Cell: (570) 899 – 2876

Theodosios Bligiannos, Meeting Leader

Email: Cell: (267) 438 – 5346

Joseph Michel

Email: Cell: (717) 424 – 1797

Interview/Discussion

We have two outstanding topics we want to discuss from our last meeting:

How to match the responses of the Alumni Survey to specific alumnus entries in the system.

What platform the alumni survey will use for the future.

We have created a prototype User Interface based on the mockup reviewed in the previous meeting as well as the feedback received. The User Interface is visually accurate of the final system, however much of the system's functionality will not be present. We would like to review the prototype to ensure it meets the visual needs for the system.

We have updated the Data Model that was reviewed in the previous meeting to include the survey response information and change tracking metadata. We would like to review the Data Model again to ensure all necessary data is stored in the system.

Meeting 5 Minutes

Meeting Date: Thursday, November 17th, 2022

Meeting Time: 4:00PM EDT

Meeting Location: Virtual, Zoom

Attendees: Alyssa Drachslin, David Fiel, Jeremy Shaughnessy, Theodosios Bligiannos, Joseph Michel, Aditi Rao

Summary of Developments:

During our fifth meeting with the client, we reviewed the User Interface prototype as well as the updated data model.

Take off "s" from Sport(s).

Make TUID required for create alumnus but not Temple Email.

Need a list of Industries that she wants added which she will provide (TBD when)

Sport code added to the validation table.

Create an engagement status filter for the alumni list

Engagement status validation- High, Low, Inactive, and N/A.

Create Sport Status validation table

(IA – inactive, AC- active, VZ – Needs to be investigated)

Follow-Up on Action Items from Previous Meeting:

TUID and AccessNet will be optional fields in survey

Missing TUIDs will be manually filled in before import

New Topics and Materials to Discuss:

Ensure Google Forms is a viable platform for future use

Investigate what VZ means for sport activity status

Next Meeting Topic: Final Presentation

Next Meeting Date, Time, and Location: Thursday, December 8th, 2022 at 4:00PM EDT, Location TBD