



Pre-Launch Technology Considerations and Sample Checklist

Purpose:

This resource outlines key considerations for ensuring technology is set up before launch in a way that supports the success of CBE students. It is comprehensive but not exhaustive. This document also includes a sample go-live checklist. Remember, functional testing should take place at least 3 months prior to the start date of your pilot and should be repeated periodically.

Pre-Launch Technology Considerations Unique to CBE

- **Users (students, faculty, and staff) may need to regularly access systems outside of normal business hours.**
 - ◆ Consider how this impacts standard procedures like overnight maintenance outages.
 - ◆ Users may need access to tech support after normal business hours.
 - ◆ It may be helpful to establish maintenance schedules and share them with CBE students well in advance of potential conflicts.
- **Faculty and staff may perform more manual data entry than normal to accommodate CBE processes (e.g., transcripts).**
 - ◆ Create a list of faculty and staff who will be involved in data entry.
 - ◆ Focus on designing processes that minimize the likelihood of human errors (e.g., guidance for processing smaller batches of data, requirements that staff engaged in data entry are consistent, instructions for how and when data will be reconciled, etc.).
 - ◆ Consider how the timing of human data entry processes aligns with the timing of automated processes (e.g., will automated processes interrupt manual data entry, or vice versa, etc.).
 - ◆ Work to move away from manual entry over time. Identify a continuous improvement process for technology that leads to as much automation as possible. This approach could involve identifying a dedicated person for collecting ongoing feedback from users to identify challenges with manual entry and opportunities for automation.
- **CBE students may be connected to systems that other students are not or may use existing systems in different ways from traditional students**

- ◆ CBE students may access a different learning management system, integrated learning tools (LTI tools), or CBE-specific transcription services.
- ◆ Some CA CBE Collaborative institutions are piloting Regent Education's financial aid management software with CBE students; while this is not a software that students use directly, it is a system that houses their personal data and consideration should be given to what impacts that has on students now and in the future.
- ◆ Check data governance and security agreements to ensure students are providing all consent required to access systems and for the college to use and store their personal information in the ways planned (e.g., do students need to know which systems will include their data, do they have a right to request copies of their data from different systems, etc.).
- ◆ CBE students may need customized instructions for access to common enterprise systems (e.g., do CBE students using Canvas receive instructions that are different from what students normally receive given how modules have been structured).

Sample Go-live Checklist

- ***Test Everything And Prepare For Worst-Case Scenarios***
 - Test the functionality of each system including any integrations
 - Ensure redundancy and backup systems are in place
 - Complete an accessibility check to ensure compliance and ease of use (e.g., check fonts, colors, alt text, links, volume controls, keyboard navigation, screen reader and assistive technology compatibility, etc.) Remember all colleges must comply with state and federal requirements related to accessibility for individuals with disabilities. [WCAG](#) is an internationally recognized standard for making content more accessible.
 - Test the functionality of mobile-friendly sites and any dedicated apps
 - Conduct stress and penetration tests
 - Establish or update existing risk mitigation plans to ensure new systems are considered
- ***Prepare For Users***
 - Use a sandbox to help determine which roles and permissions are most appropriate
 - Configure and test functionality of roles in each system (Adjust permissions as needed)
 - Allocate licenses
 - Design content for professional development and training with different audiences and levels of digital literacy in mind (e.g., training videos, FAQ docs, user guides, etc.). The [CBE for Canvas Training Guide](#) developed by the CA CBE Collaborative may be a helpful resource when designing training.
 - Update tech support knowledge bases
 - Issue account log-in information and any instructions for users to set up accounts
 - Deliver training and provide ongoing support
 - Incorporate user notices and reminders into the system (e.g., If following a subscription based model, include a reminder to students that their access to the course content will only be the length of the term, instructions for enrollment in the next course, etc.)
 - Review costs associated with institutional and user tech support and allocate resources appropriately (e.g., some vendors charge for phone-based support, etc.)
- ***Create Channels For Receiving And Responding To User Feedback***
 - Provide the student's experience requesting support and design for ease of use (e.g., include a "Questions/Help" section at the bottom of each page to allow students to contact Faculty, Counselor, Fin Aid, A/R, Staff Support, Academic Supports (Tutoring), or Library, etc.)

- Consider using [Canvas Impact](#) to provide automatic contextual help for users. Note: colleges may incur a set-up fee for this service.
- ***Help Faculty And Staff Test Systems And Adhere To Best Practices For Tech Management***
 - Provide guidance for faculty and staff so they can clearly document processes and procedures that utilize technology
 - Help faculty and staff validate any data migrated to new systems
 - Encourage faculty to test all course content, resources, and assessments are accurate and functioning correctly (including external links and third-party educational tools)
 - Ensure faculty, staff, and students understand institutional rules and policies for technology usage that apply to them, partners, and to students (e.g., what are the procedures for securing student permission to share information about course performance with an employer sponsoring incumbent worker training, will the institution use a system like Canvas Credentials or Canvas Portfolium to enable students to share academic achievements with employers in a secure way, etc.).