PAGE 1 / 3 - MAJOR SYSTEM RECORD

ONE MAJOR PLATFORM OR SYSTEM - IDENTITY, DESCRIPTION, ACCESS AND OWNERSHIP

System Name:		**Vendor / Provider:**	
Product Line:		**Version / Edition:**	
Internal Owner:		**Business Owner:**	
Review Date:		**Next Review:**	
System Type:	**Primary Users:**	**Support Contact:**	**Contract Start:**
Renewal Date:	**License Scope:**	**Hosting Type:**	**Criticality Level:**

System Classification

☐ SIS	☐ Identity / SSO	☐ Analytics / dashboard
☐ LMS	☐ Communication	☐ Content repository
☐ Assessment	☐ Finance / HR	☐ AI-enabled system
☐ Curriculum	☐ Operations	☐ Other

System Description

Describe the purpose of this system, major functionality, users served, business owner, operational importance, and known limitations.

Ownership & Operational Role Questions

Technical Evidence Question	Y	N	Notes / Evidence
Is this system mission-critical, instructional-critical, operational support, optional, or unclear in the ecosystem?	☐	☐	
Is there an internal owner and business owner responsible for decisions, support, renewal, and data governance?	☐	☐	
Which groups depend on this system daily, weekly, seasonally, or only during specific administrative cycles?	☐	☐	
Is the system substituting for, duplicating, or overlapping with another platform or manual process?	☐	☐	
Are support pathways, vendor contacts, escalation paths, and documentation accessible to the right staff?	☐	☐	

Access & Authentication Questions

Does the system use SSO, MFA for admins, role-based access, and least-privilege permissions?	☐	☐	
How are accounts created, updated, suspended, archived, and deleted?	☐	☐	
Are student, staff, admin, and family access roles clearly separated and documented?	☐	☐	
Can access changes be audited by user, date, role, and action?	☐	☐	
Is there a reliable process for offboarding users and removing unnecessary access?	☐	☐	

Auditability

☐	Documentation Available
☐	Evidence Available
☐	Vender Verified
☐	Archived

ONE MAJOR PLATFORM OR SYSTEM - DATA AND SECURITY

System Name:

Data & Security Questions

What student, staff, financial, behavioral, academic, assessment, or identity data is stored or processed?	☐	☐	
Is data encrypted, backed up, retained appropriately, deletable, and recoverable?	☐	☐	
Does the vendor use data for product improvement, analytics, AI training, or third-party processing?	☐	☐	
Are DPIA/DPA/privacy documents, breach procedures, SOC/security reports, and compliance evidence available?	☐	☐	
Is auditability sufficient for logins, admin changes, data exports, AI actions, and integration events?	☐	☐	

Data Sensitivity Flags

☐ Student PII ☐ Staff PII ☐ Assessment data ☐ Health/IEP/plan data	☐ Financial data ☐ Behavior data ☐ Identity data ☐ AI/chat logs	☐ Usage/clickstream ☐ Exportable data ☐ Third-party processing ☐ Unknown

Workflow & Integration Snapshot

Connected System Name	Data Exchanged	Direction	By API	Manual	Notes
		Sends / Receives / Both	☐	☐	
		Sends / Receives / Both	☐	☐	
		Sends / Receives / Both	☐	☐	
		Sends / Receives / Both	☐	☐	

Integration Reliability Questions

Technical Evidence Question	Y	N	Notes / Evidence
Are integration owners, technical contacts, refresh schedules, and failure alerts known?	☐	☐	
Are any workflows dependent on CSV uploads, manual exports, screenshots, email, or human re-entry?	☐	☐	
Are API scopes, permissions, tokens, secrets, and data fields documented and reviewed?	☐	☐	
What happens when the integration fails, duplicates records, sends stale data, or mismatches identities?	☐	☐	
Can integration activity be audited, including data transferred, timestamp, source, destination, and error state?	☐	☐	

Integration Methods Present

☐ API ☐ SFTP / file transfer ☐ CSV upload ☐ LTI	☐ OneRoster ☐ Clever/ClassLink ☐ Manual entry ☐ Manual export	☐ Email attachment ☐ Webhook ☐ Unknown ☐ Not integrated

ONE MAJOR PLATFORM OR SYSTEM - RISK, SUPPORT, LIFECYCLE AND RENEWAL DECISION

System Name:

Operational Risk Questions

Technical Evidence Question	Y	N	Notes / Evidence
Is there a single point of failure in ownership, data access, integrations, vendor support, or institutional knowledge?	☐	☐	
Is uptime, performance, incident history, support responsiveness, and vendor reliability acceptable?	☐	☐	
Does the system create manual work, duplicated data entry, unclear ownership, or shadow workflows?	☐	☐	
Does the system overlap with another system enough to consider consolidation, repositioning, or retirement?	☐	☐	
Is staff training, documentation, and support capacity sufficient for sustainable use?	☐	☐	

Lifecycle & Renewal Questions

Is the system still aligned to instructional, administrative, compliance, or operational priorities?	☐	☐	
Are cost, usage, support burden, integration complexity, and risk justified by current value?	☐	☐	
Are contract terms, renewal windows, data return/deletion, and exit requirements documented?	☐	☐	
What work would be required to migrate, replace, consolidate, or retire this system?	☐	☐	
Does this system require leadership, privacy/legal, finance, academic, or vendor review before renewal?	☐	☐	

Risk / Review Flags

☐ Security risk ☐ Privacy risk ☐ Integration risk ☐ Data quality risk	☐ Vendor reliability risk ☐ Cost increase ☐ Low adoption ☐ High manual workload	☐ Training gap ☐ Redundant system ☐ Contract risk ☐ Migration risk

Technical Recommendation

☐ Keep / maintain ☐ Improve workflow ☐ Improve security controls ☐ Reduce manual process ☐ Replace / retire possibility	☐ Needs vendor review ☐ Needs privacy/legal review ☐ Needs cost review ☐ Needs training/support plan ☐ Escalate to leadership

Final Technical Rationale

Summarize the technical decision, key evidence, risk level, required follow-up, and recommended next action.

DEVICE FLEET SUMMARY

SUMMARIZE DEVICE CATEGORIES, QUANTITIES, CONDITION AND REPLACEMENT NEEDS

District / School:	Prepared By:	Review Date:	Refresh Cycle:

#	Device Category	Approx. Count	Primary Users	Assignment Model	Condition	Refresh / Need Notes
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						

Fleet Status	Priority Need	Next Review
☐ Adequate ☐ Shortage ☐ Aging devices ☐ Mixed condition	☐ Replacement ☐ Repair backlog ☐ Spare pool ☐ Inventory cleanup	☐ Usage data ☐ Budget estimate ☐ Leadership decision ☐ Vendor quote

SECTION 3 - TECH MANAGEMENT

INFRASTRUCTURE & SPECIALIZED TECH RECORD

DOCUMENT NON-STANDARD ASSETS, INFRASTRUCTURE, SPECIALIZED TOOLS, SPACES, AND SUPPORT NEEDS.

Asset / System Name:	Location:	Owner / Custodian:	Review Date:

Asset Category	Purpose	Location / Space	Users Served	Condition	Support Notes

Asset Type	Support Need	Risk Area
☐ Network	☐ Vendor support	☐ Aging
☐ Display / AV	☐ Internal support	☐ Single point failure
☐ Lab / maker	☐ Training	☐ Limited access
☐ Assistive tech	☐ Documentation	☐ Security concern
☐ Security / safety	☐ Replacement plan	☐ Unfunded need

Implementation / Maintenance Notes

DEVICE ASSIGNMENT LEDGER (FRONT)

TRACK DEVICE ASSIGNMENT, LOCATION, USER/GROUP, AND RETURN/STATUS NOTES.

Ledger Type & Model & Location Issued **Ledger #________________________**

Status	Assignment Model	Issuing Location:
☐ Assigned ☐ Available ☐ In repair ☐ Needs Part or Cord ☐ Missing ☐ Retired	☐ 1:1 ☐ Cart / shared ☐ Lab / fixed ☐ Checkout ☐ Staff device	____________________________________ **Actions >** ☐ To Repair ☐ Order Replacement ☐ Collected ☐ Retire
Device Brand:	**Asset Manager:**	

#	Asset Tag / ID		Model Number			
1						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
2						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
3						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
4						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
5						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
6						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

SECTION 3 - TECH MANAGEMENT	DEVICE ASSIGNMENT LEDGER (BACK)

Ledger Type & Model & Location Issued **Ledger #_______________________-2**

#	Asset Tag / ID		Model Number			
7						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
8						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
9						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
10						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
11						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
12						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date
#	Asset Tag / ID		Model Number			
13						
	Image Ref. No.	Assigned To Name / Group	> Campus/ Room	Issued Date	Action >	Action Date

DEVICE IMAGE RECORD

DEFINE THIS ONE DEVICE IMAGE FOR STANDARD SOFTWARE, SETTINGS, SECURITY & ANY OTHER DEPLOYMENT BASELINE.

Image Name or Number:	**Tech Coordinator:**
Device Group:	**Version / Date:**

☐ **Teachers**	☐ **Students**	☐ **Staff**
Security Baseline ☐ Endpoint protection ☐ Device encryption ☐ Content filter ☐ Admin restrictions ☐ Patch policy	**Access Setup** ☐ SSO ☐ Rostering ☐ Local profiles ☐ Accessibility tools ☐ Language tools	**Deployment Notes** ☐ New device ☐ Refresh ☐ Repair return ☐ Summer reset ☐ Pilot group

No.	Component Area	Brand/Name	Standard Included	Version / Setting	Notes
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					

Notes:

TECHNOLOGY VENDOR RECORD

DOCUMENT VENDOR CONTACT, SUPPORT, CONTRACT, RENEWAL, AND OTHER NOTES.

Vendor / Provider:	Product / Service:	Internal Owner:	Account Number:
Notes:			

Contact / Role	Email / Phone	Contract / Term	Renewal Date	Support Notes

Value	Risk	Decision
☐ High use	☐ Privacy / security	☐ Renew
☐ Critical system	☐ Integration risk	☐ Renegotiate
☐ Good support	☐ Cost increase	☐ Replace
☐ Strong data value	☐ Vendor reliability	☐ Monitor
☐ Low value	☐ Low adoption	☐ Escalate review

Action to Take	Owner	Due Date	Decision / Status	Notes