

SMG Extracts

21 June 2011

SMG/2010/183 Student Lifecycle Project (Verbal report)

The item was not discussed at the meeting but deferred to the PAG meeting of Tuesday 5 July.

25 July 2011

SMG/2010/198 Student Lifecycle Project (DN) (Verbal Report)

SMG received a tabled paper and an oral update from the joint Directors of the Student Lifecycle Project (SLP).

It was noted that the pilot of MyCampus in Science was operating well and there had been a good uptake by the student cohort. Not all students had completed the registration and enrolment process in full, but this was not a concern; it was expected that students would 'dip in and out' of the system. The process for providing support to students was working well and the majority of issues/queries had been resolved. The nature of the issues/queries was being collected on a systematic basis and, where possible, the guidance would be updated or improved to address the issue. Information would also be shared with other Colleges in advance of the launch of the system. The largest proportion of issues/queries related to Enrolment (third course choice, change of programme of study and qualifications - eg equivalents or having necessary pre-requisites). It was noted that there had been no specific feedback from students on MyCampus, but none had been requested.

The SLP team was working with Colleges and University Services to review their readiness (set up, communications, of support teams, training needs, etc) prior to the Registration and Enrolment rollout, and a similar process would be implemented for each subsequent rollout. The main issues in relation to readiness were class creation and plan building/sense checking of plans, but particularly the latter. Sense checking of plans was important as, in some cases, it had revealed problems with the plan build, which had to be resolved. Heads of Schools/RIs had been asked to ensure that all plan building work and sense checking was completed by 27 July, and Heads of School Administration had been asked to check that all classes had been created by the same date. It was noted that the Deans (Learning & Teaching) were overseeing the process within Colleges.

Details of any outstanding work were to be submitted to the SLP joint Directors on 27 July and this information would be passed to the Project Board, along with priority actions. It was agreed that the information should also be shared with the Heads of College and with SMG.

Action: CRL and SMacd

System testing was in progress and would continue until 5 August. Testing of the conversion process was underway (ie the transfer of data from Websurf and related systems into Campus Solutions) and, to date, the error rates were at an acceptable level. Errors were generally associated with data quality and not limitations of the system. Load testing (modeling the expected usage by simulating multiple users accessing the programme concurrently) against Campus Solutions, the CRM and Sharepoint had been undertaken successfully. Conversion would go live and full data transfer would commence on 29 July until 5 August. Relevant systems would be brought down at that time; communications about this had been issued to staff and students. MyCampus would be available for student registration and enrolment from 8 August and a schedule would be drawn up to stagger access to MyCampus and communicated to various student cohorts (eg new students, continuing students, etc). It was noted that there would be an opportunity on 4 and 5 August to add or correct data (eg plan builds following sense checking) before the go-live date of 8 August, should this be necessary. The Secretary of Court supported the use of 4 and 5 August to maximize the robustness of the system and enhance the successful transition to and implementation of MyCampus.

The Senior VP thanked the joint SLP Directors for their update, and noted the good progress.

8 August 2011

SMG/2011/6 Student Lifecycle Project (Verbal report)

The Secretary of Court provided a brief verbal update on the SLP. He reported that the pilot project for Science new entrants had been successful. It closed on Friday 29th July.

During this current week, the system had been closed to allow the legacy system data to be converted to the Campus Solutions live environment. It was intended that the data would be transferred by the 10 August.

The plan was for Campus solutions to go live for new students on 8 August and for continuing students on 15 August. He also indicated that load testing had been carried out over July and the results, in terms of the resilience of the IT infrastructure, had been encouraging.

He noted that continuing progress across Schools and Institutes to build and test the programme rules had also been encouraging. While there were still areas to be completed, these had been identified and were to be given priority in the lead up to the system going live again on 8 August.

Overall, the Project Board was satisfied with progress.

The SMG noted the report. It noted that the pilot run had been very helpful in building working relationships with the College and the SLP team. It had also provided a positive view of Campus solutions. While there were a number of queries from users, the issues raised were not complex and were easy to resolve. Members noted however that there may be a strain on support teams once the system goes live if the number of queries dealt with in the pilot scheme was indicative, though as noted, this was likely to be an issue of volume rather than complexity.

It was confirmed that Advisers will be scrutinising study plans to ensure that the system was working.

21 September 2011

SMG/2011/19 Student Lifecycle Project (DN) (Verbal Report)

The SMG received an update report from the Secretary of Court and Director of Student Services.

The Secretary of Court confirmed that the system had gone live for new students on 8 August and for continuing students on the 15 August. He reported that on the positive side the software and hardware appeared to be robust, and over 20,000 had completed registration. The Director of Student Services tabled an up-to-date Registration and Enrolment Statistics paper which indicated that 95% of UG had started registration and 91% had fully registered.

On the negative side he reported that there continued to be a large number of support calls to Schools and this was placing a heavy burden on staff. The key area of concern was the transition from completed registration to full enrolment which for UG was 91% UGs fully registered, 59% fully enrolled; for PGT 63% fully registered 26% fully enrolled. The Director of Student Services also highlighted that there was a gap between UGs who had started enrolment (84%) and those that had completed (59%).

The meeting recognised that support staff and schools were doing their utmost to make enrolment to classes happen and that that students and Schools were bypassing the system (use of Moodle for example) in order to get classes underway. The situation on the ground was therefore likely to be further advanced than the figures indicated by My Campus.

Various reasons were given for the problems with enrolment.

Among them was the robustness of the rules and the inability of IT systems to override pre-requisites which were either incorrect or surmountable through human judgment and intervention. The Director noted that where pre-requisites were being overridden on a consistent basis, then the rules could and would have to be amended.

Timetable clashes also appeared to present problems, though again, the Director suggested that some of the problems lay in the design of the drop down class options menu (there were more options available to students than might at first appear) and this had to be, and could be remedied.

The Director also suggested that the unfamiliarity of the system had caused some problems which, through time and as staff gained in knowledge and confidence, will be addressed. It was argued however that part of the problem stemmed from the lack of training and/or lead in time for staff to build up sufficient understanding of the system.

Delays had occurred (particularly in the Business School) as PG students were put on hold on the basis that full fees had not been paid, though this had now been addressed and enrolment was proceeding on partial payment. In addition the system had thrown up fee issues, though again it was noted that this was not peculiar to MyCampus and that in past times the Registry usually spent considerable time around registration and beyond sorting out fee matters. MyCampus had in effect made visible an aspect of registration/and enrolment that predated the introduction of the system.

In terms of systems issues, a problem with class emails had been identified and was being addressed. This had made communication with new classes/tutorials difficult and in conjunction with delays in enrolment, it was likely that classes/tutorials would be missed.

A question was raised over the PGR numbers (74% started registration, 57% completed) though Colleges confirmed progression of PGRs and there was less concern over their status particularly as arrival and enrolment amongst the PG cohort was traditionally slower.

The Head of College Arts asked the other Colleges if the problems with MyCampus had in their view discouraged PG/PGT to come. The Colleges of Social Sciences and Science and Engineering did not think so, and the College of MVLS had no evidence to hand one way or the other.

The SMG was once again mindful of the efforts colleagues were making across campus to work through this challenging time. It was aware that the introduction of the new system had absorbed a lot of staff time and it was therefore important to ensure that as other elements of MyCampus were rolled out that any further disruption was kept to a minimum.

That said, it also recognised that MyCampus was a complex system and its introduction was always likely to pose challenges. A great deal of knowledge and experience had been gained by staff and students over the previous few weeks of its introduction and this should not be lost. It was important that the focus was now on remedies and taking the project forward and not on apportioning blame. The long term goals of the project were still critically relevant to future and enhanced service delivery and had to be reasserted continually. It was important that students were reassured that if they encountered any difficulties, solutions were available and that they should continue to contact their advisers.

The Secretary of Court reminded the SMG that he intended to send a message to all staff which acknowledged the difficulties of the last few weeks and that lessons would be learned as further aspects of MyCampus were introduced and the full value of the system began to be realised.

Action: DN

24 October 2011**SMG/2011/36 SLP - MY Campus (DN) (Paper)**

The Secretary of Court drew attention to the update report circulated to SMG, and summarised the position under three headings, Action to ensure full enrolment, Project Plan, Lessons learned.

Action to ensure full enrolment for 2011/12

He noted that the most urgent task at present was to ensure full enrolment for this current year.

With regard to Undergraduate enrolment he reported that the majority of students had now completed their first-semester enrolment. He noted that they had been sent a standard annual message drawing their attention to the need to ensure that records were accurate for the December exam diet and giving them a deadline of 19 October to complete enrolment. He had used this message to apologise for any difficulties students might have encountered in the enrolment process.

With regard to Postgraduate students, it was evident that many had still to enrol fully. In most cases, there were good reasons for the delays. One area of difficulty however related to fees for continuing part-time PG students.

The Project Plan

Continuing progress was being made with the Project Plan, with a commitment to minimise any additional workload this may place on staff in Schools. UCAS admissions had gone live and was working satisfactorily. It was planned to use the new MyCampus Direct Admissions System for non-UCAS entrants in September 2012. This would be subject to satisfactory testing with staff in RIO and with approximately 20 non-RIO staff based in Graduate Schools.

He also noted that Gradebook would be considered next semester and after a pilot had been run to check reliability.

Lessons Learned

The report noted the membership of the Lessons Learned Panel which comprised of:

Professor Frank Coton, Vice-Principal Learning & Teaching (convener)
 Fred Cartmel, Chief Adviser, Social Sciences
 Professor John Chapman, Vice-Principal and Head of College
 Dr Don Spaeth, Senior Lecturer, History
 Karen Lee - SLP Team
 Lillias Robinson, Head of School Administration, Life Sciences
 Professor Joe Sventek, Head of Computer Science
 Eleanor Waugh, SLP Team
 Janice McLellan - SLP Team (secretary)

The VP (Learning & Teaching) updated the SMG on current activity noting that it had had its first meeting and an extensive consultation exercise was now underway with staff and students. The Review would also include consultation with Queen's University. The panel intended to report to the SLP Project Board on 5 December, and thereafter to Senate (8 December) and Court (14 December).

Concerns were raised over outstanding fee issues and the fact that temporary arrangements with regard to email accounts for example had come to an end. This had to be addressed as soon as possible.

Members also discussed ongoing concerns surrounding the advising system, and the need for earlier intervention for curriculum advice. While understanding the need, it was also agreed that the overhaul of the advising system arising out of the review Chaired by Professor Noreen Burrows and its drive to shift the focus onto the pastoral side of advising should not be abandoned. Further thought should be given as to how best to meet the needs of the students and at what critical points in their interaction with the enrolment process and beyond.

In addition, the SMG agreed that it was imperative that Assessment functionality was sound; that an independent assessment of the robustness of the technical base, proceed (the Director of Finance confirmed that Deloitte had been approached to undertake this work); and that PGR admissions was addressed and introduced under MyCampus only after sufficient testing had been undertaken.

16 November 2011

SMG/2011/51 SLP (DN)

The Secretary of Court updated SMG on current progress.

Enrolment: UG enrolment was progressing well and PG enrolment was improving.

Registration: there were still some issues around fee levels and sponsors to be resolved. Identity card provision for those who had been unable to complete transactions had been fixed.

Examination marks/returns: user testing over a two week period was planned later in November.

Management reports: the capacity to generate management reports was to be given priority over the coming weeks.

The SLP Board was due to meet on the 5th December and it would review the go live timings for Direct Admissions and Gradebook.

With regard to the Working group established to review lessons learned, the VP (Learning & Teaching) advised SMG that he hoped to have the key issues identified and itemised by the time of the Board meeting. He noted that it was important to tease out the limitations of the system where and if they existed, from errors in its use. He highlighted the importance people gave to trialing and that this should be capitalised upon and that advising and what's expected of advisers was still an issue for many. Student feedback suggested that they did not find the system intuitive. The SMG recognized that a balance had to be struck in developing the system between limiting options for students where possible and desirable, while retaining choice where it was needed. The VP commended the membership of the group and its hard work in gathering and analyzing the feedback.

The reliability of admissions data was also raised and it was agreed that the VP (Strategy & Resources) and the Secretary of Court would investigate the matter further. There was also a need to ensure accurate enrolment figures for the forthcoming SFC return in that there were consequences for either inflating or undercounting final student numbers. The VP (Strategy & Resources) would consult with Registry staff and the College secretaries to establish as accurate a picture as possible.

Finally it was noted that the visit of the Head of Student Services and the Secretary of Court to the Colleges had been helpful and constructive.

15 December 2011

SMG/2011/67 SLP Project Board (DN) (Paper) (Annex 1) (Annex 1a) (Annex 1b) (Annex 1c) (Annex 2 cover) (Annex 2) (Annex 3)

The Secretary of Court highlighted the main issues relating to the SLP project and as discussed at the most recent Project Board held on Monday 5 December.

1 Short-term priorities

The facility for Direct debits was due to come on stream on 16 December.

A recent User Acceptance Test for exam mark recording had been very positive and, in December and January, a series of workshops were being run for those staff who will be loading exam marks onto MyCampus. A paper was attached to the report, identifying the participants involved in the workshops. It was noted that, though the system was simple to operate, it was imperative to have all those required to key in exam results attend a workshop to ensure complete coverage. It was agreed that College Secretaries should liaise with the Director of Student Services to ensure that all schools were covered and the relevant people trained by mid January. Lists of essential staff, should be agreed by the PAG meeting scheduled for 19 December.

Action: DN, HofC

2 Project Plan : Future Functionality

A key aim of the Board was to implement new elements of functionality only where there was a high level of user confidence and where it was satisfied that training had been thorough.

With regard to Direct Admissions, the Board agreed to retain the University's current system for the remainder of this session and to implement MyCampus Direct Admissions in July 2012. It agreed to pilot the MyCampus Direct Admissions system, focusing on Exchange students and Part-time Undergraduates, in the second semester of this year.

It has also agreed not to introduce Gradebook, as Oracle was developing new functionality in this area which will be superior to what Gradebook currently offered.

3 Fees-setting

A particular area of difficulty encountered this summer had been the complex arrangements for setting tuition fees, leading to many students experiencing lengthy delays in the Registration process. A policy paper, prepared by the VP (Strategy & Resources), Director of Student Services, and Director of RIO, had been prepared which aimed to streamline the current approach and establish responsibilities more clearly. The paper would be discussed under Item 11 of the SMG agenda.

4 Lessons Learned

The VP (Learning & Teaching) then summarised the key findings of the Lessons Learned Group and which were included as an annex to the paper. Actions proposed by the SLP Team to address them were also included.

A range of improvements required were noted and grouped under 8 themes: The User Interface; Student Finances; Enrolment; Access to Information; System Performance; Data Management; Communication; and Training & Support. He highlighted the following:

User interface

It was recognised that this was not as good as it ought to be and improving it had been given a higher priority going forward. It was also noted that the interface between MyCampus and advisers had not been as effective as it ought to have been resulting in additional work for advisers.

The intention was to improve navigation and usability over the next quarter. The Secretary of Court noted that there had already been some redesign of screens, that would be shared with user group late January. The aim was to have a fuller re-design in place for April. Error messages which were obscure were being addressed with a view to making them more meaningful; Oracle was also releasing an English spelling and terminology version.

Student Finance

There was no automated fee calculation in the legacy system and so in the past, all discrepancies had been adjusted manually. My Campus calculated fees automatically based on the rules set and against the fees schedule. Any deviation from the rules would result in discrepancies with the My Campus student record and so it was imperative that ad hoc agreements outwith the rules should not be made. As there will be a direct link with Direct Admissions when that module goes live, fees will automatically be calculated for inclusion in offer letters from 2012/13..

Improvements to the presentation and messaging to students for fee related matters were being undertaken. It was noted that substantial work would be required on the Student Finances module to take account of changes to RUK funding arrangements.

With reference to Process Changes/Adoption the Secretary of Court drew attention to the requirement to complete registration prior to enrolment. This had proved particularly problematic in relation to international students and it was intended that recommendations will be brought back to SMG with regard to any policy changes required to improve the (international) student experience and to avoid any unnecessary delays to enrolment.

Enrolment

Class screens and class options pages were to be simplified. It was also intended to pursue the 'My requirements' option which would guide students in their choices, essentially by limiting options, by presenting mandatory, recommended or optional courses for their current Plan. This would require a policy change and the implications for Erasmus and part-time students, which were significant, would need to be fully explored. It was intended that this should be undertaken involving the relevant stakeholders prior to the next enrolment cycle. The functionality 'Quick Enrol' had created frustrations and steps were being taken to improve it. A complete review of all pre-requisites was to be undertaken by Colleges and Schools to ensure they were complete and accurate, and to clarify who had the authority to over-ride which ones and when.

Access to Information

The VP (Learning & Teaching) noted that an interim solution for ad hoc reporting using BI Query will be available mid January. It was confirmed that this would be available on 15 January. A longer term solution would be considered once the interim solution was in place. Queries developed by the SLP were being refined and were to be released mid December.

System Performance

System performance was continually monitored and a representative group of users had been created to provide feedback on performance.

Data Management

SMG noted that data migrated from WebSURF had been of questionable quality and a more thorough data cleansing exercise was required. The issue of data quality was being given higher priority. Plan and progression rules were also being tested and reviewed.

Training & Support

It was acknowledged that training had to be improved and that while the materials were available, they needed to be promoted to encourage better engagement. Timing of training and the identification of the right people to be trained in the most appropriate areas also had to be addressed. The possibility of providing a 'play' environment populated with real data and reflecting the range of anomalies and variables encountered in reality to support training and testing was being considered.

In addition to these specific areas the VP (Learning & Teaching) highlighted some general points of note.

He suggested that there appeared to be no shared vision across the campus as to what the SLP could or was intended to do. To an extent this presented the challenge of reinforcing the intentions behind the project while managing expectations. It appeared that members of the community saw the SLP as an imposition and there was a challenge to turn this perception around. It was also the case that not all the problems identified could be fixed and that a distinction had to be made between people's wish for a different system and what was achievable within the MyCampus capability.

The Senior VP suggested that it would be helpful, and provide positive impetus, to involve students in the ongoing development of MyCampus, making them part of the solution. The original concept that the SLP project was good for students was and remained a strong and positive message.

The combined effect of restructuring and roll out of MyCampus had created problems of ownership and spheres of influence: staff were not always clear what their role would be and therefore the nature and level of engagement they would be required to have with the new product and systems.

There was also a lack of clear accountability: the Project Board was seen as the ultimate and only 'real' body responsible for roll out of the system and that if the product was to be rolled out successfully there had to be levels of accountability across the system and organisation.

Equally the Project Board felt that its engagement with the project was not always as informed as it should have been and that the membership was perhaps not as representative and therefore as able to assess the reality on the ground as necessary. The VP raised the question as to whether or not the current Project Board had the right combination of skills to carry the project forward and the right level of representation to encourage trust and engagement.

This raised the more general concern over the way the University established Project Boards and what was expected of them.

On the positive side, colleagues had rallied round to help students through the process of registration and enrolment.

In the course of implementation, and in order to ease the path for students, overrides had been put in place and there was now a need to understand those that were still necessary and those that were not and which, as a consequence, could be removed from the system.

The Project Board had considered practical steps that might be taken in the coming year and that will have a positive impact before next summer, and those actions that will require a longer timescale to complete.

It intended to agree a detailed action plan and to review the resource requirements associated with it and this should be in place in time for the next SMG meeting in January. If an increase in the Budget was required, a formal request would be made to SMG at that time.

The SMG agreed the three key proposals noted in Annex 3 of the update report and which were:

- a) to work with key stakeholders comprising senior managers across the University to determine the appropriate communication channels and audiences and to identify the appropriate staff to be engaged in the groups outlined in b) and c) below.
- b) to establish a representative group of senior managers from Colleges and University Services who will manage and be accountable for buy in and adoption of the agreed developments and processes in their business areas.
- c) to establish representative User Groups, involving Subject Matter Experts, who will work closely with the SLP Project team and the ongoing Student Lifecycle Support and Development team on all aspects of new functionality (including requirements gathering, design and development, testing, training and deployment). This Group must be empowered to make decisions and sign-off system developments and processes on behalf of the business area which they represent. The stakeholders identified above will then be responsible for ensuring adoption throughout Colleges and University Services.

In agreeing these proposals, the SMG agreed that communication and engagement were key priorities and discussed in more detail and in the context of these proposals various ways in which they might be achieved. These included: ways in which the Project Board might be enhanced through better representation of users - students, advisors, and those with learning and teaching responsibilities; greater importance given to CMGs throughout the process to ensure ownership and responsibility for taking matters forward with Heads of School and College Secretaries, and mitigating against the temptation to push the problem out to others; and Deans of Learning and Teaching to be utilised more

It was also noted that Court had requested that once the new system has stabilised that a review of the way projects were generated, developed and subsequently managed should be undertaken.