**Annex 3**

**Lessons Learned Themes: Proposed Actions**

***Report to SMG***

**Community Engagement**

A recurring theme in the Lessons Learned review has been the need to re-engage with the community and to work closely with them in the development and deployment of any new/enhanced functionality.

Linked to this we need to formally establish robust communication mechanisms, with clearly identified responsibility and accountability.

To this end we propose:

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.

**Theme 1: User Interface**

*"Improve the navigability and clarity of language, supported by improved on-screen messages/information, user guides for each aspect of the system and on-line help for all users. Usability and the user experience of staff and students must be given a very high priority in MyCampus".*

***System enhancements***

Navigation and usability will be improved over time starting with the next upgrade coming from Oracle which emphasises improved functional configuration (rather than customisation). This will also address concerns with respect to the ease and time taken to input and/or update data in MyCampus. It is expected this upgrade will be applied in the first quarter of 2012 after which the team will begin reviewing configuration for various processes with the Adviser interface being the first priority.

In addition to the Tools upgrade Oracle releases quarterly bundle packs that correct reported problems and incorporate new features as requested by customers. One of these includes the use of English rather than American spellings/terms, although at this stage it is unclear how far-reaching the changes will be. The SLP are currently in the process of applying the most recent bundle packs

and will be able to report on this functionality in early 2012.

Many usability features can be managed by users setting defaults based on personal preferences. However, through feedback from users it is recognised it would be beneficial to change some settings centrally, e.g. setting institution to GLSGW, term to default to the current year and carrying student ID from page to page. These can be turned off by individuals as some may prefer not to have these defaults switched on.

Search functionality within MyCampus does not always allow sufficient criteria to adequately narrow the results. The SLP team are currently investigating enhancements to two key components, Student Services Centre and Student Summary Page which will refine the results returned by the search facility and benefit navigability throughout MyCampus.

Some system generated error messages are confusing to the end user and could be more intuitive. For example, an error message about class time conflicts used the four digit code assigned to the class as opposed to meaningful information about the course and class. So instead of a message that reads "class 4173 conflicts with class 4092" a user will see "BIOL 1001 Lab 2 conflicts with CHEM 1001 Lecture". Block Enrol has already been changed to allow staff to see reasons for errors without having to look at each student.

The message catalogue can be updated with more user friendly information but it is important to note there are thousands of messages in the system and agreement should be reached regarding which get updated and the language to be used. It is also important to point out that the technical information needs to be retained in the error message as this is meaningful to the technician responsible for resolving any problems.

The registration process was designed to specification but it is now clear that more detailed messaging is required to improve the student experience. For example, when a student opts to pay using Direct Debit or Credit Card, they are taken to the Barclaycard pages to enter their details. It was not clear that they then needed to return to the registration process to complete financial registration. For students applying for SAAS awards the fee is not shown as paid until SAAS has confirmed the funding however this is not clear on the registration pages and a simple onscreen message will clarify this. The SLP team will work with the user community to reach consensus on how they want the process to work and collect any additional requirements in advance of next year's registration period.

**Theme 2: Student Finances**

*"Revise and enhance financial registration, in both the system and supporting business processes, so as to improve the student experience and avoid students being unnecessarily prevented from progressing through completion of registration and enrolment".*

***System enhancements***

Fee calculation: There was no automated fee calculation in the legacy system and any errors or discrepancies between the fees quoted when an offer of a place was made and registration could be changed manually. In MyCampus fees are calculated automatically in accordance with rules set and the fees in the approved fee schedule. If fees quoted to students did not conform to the rules set or were not as in the approved fee schedule they would not appear correctly in the students MyCampus record. Once the Direct Admissions module goes live fees will be automatically

calculated for inclusion in offer letters and this should ensure that there are no longer discrepancies between the fee in the offer letter and the fee invoiced. (However, it should be noted that if offers are made before fees are set an estimated fee based on the current year will be given.)

Presentation and messaging to students: Improvements to the registration pages and associated messages will be made before registration for 2012/13. Two examples where improvements will be made:

- For students applying for SAAS awards the fee is not shown as paid until SAAS has confirmed the funding, however a simple onscreen message (such as 'Awaiting payment by SAAS' could alleviate student concerns.
- The range of payment options shown are the online options. Other options are described in guidance and web pages. The information on the registration pages will need to incorporate other payment options or links to details of them.

Advance payment and deposits: Once the Direct Admissions module goes live advance payments can be made on line through MyCampus. An interim solution to capture Bank Draft reference on screen to help with reconciliation queries during registration is being explored.

It should be noted that there will be substantial work required this year on the Student Finances module to update the fee matrix from the approved fee schedule and take account of the changes to funding arrangements for students from England, Wales and Northern Ireland.

***Process Changes/Adoption***

Incorrect Fees: The issues which have arisen during MyCampus implementation in relation to fee setting and recommendations as to how these should be addressed are detailed in a separate paper to SMG. If these recommendations are approved and adopted by all Colleges then many of the difficulties that students encountered in getting clarity on the level of their fees will be resolved.

Debt preventing registration and enrolment: There were some examples of where a student had cleared all but a small amount of a debt or had had charges applied by their bank when making a payment. This resulted in a service indicator being applied to their account, preventing registration. The process for application and removal of the service indicator for debts will be reviewed prior to registration in 2012/13.

Scholarships and discounts: The process for managing scholarships and discounts was new and to work effectively required information to be supplied by RIO and Colleges and entered in MyCampus prior to registration. This year the information was recorded by the SLP team and there were some delays in the process. Going forward, this process will be managed locally and over 80 staff across the University have been trained to record scholarship and discount details for which they are responsible. This process will need to be carefully monitored to ensure that relevant scholarship and stipend information is recorded before registration is open so that the student view of fees owing takes account of scholarships and discounts prior to registration.

Verification of sponsorship: The difficulties experienced this year are partly linked to the requirement for both new and continuing students to upload the evidence/sponsor documents, which proved to be confusing for continuing students. There were some delays in processing the third party contracts; this will be addressed in the workload and resourcing of the new central Accounts Receivable Team who will be responsible for this.

Cash payment: It was noted that cash payments are not accepted by University above £50. Concerns

about this have been raised and the level will be reviewed. The University cannot accept large sums of money because of the legal implications of money laundering.

Requirement to complete registration prior to enrolment: This was the process defined, with extensive user input through the business process workshops. It has been a particular concern for international students and will be reviewed by the Project Board in conjunction with relevant staff. Recommendations will be taken to SMG with regard to any policy changes required to improve the student experience and avoid unnecessary delays to enrolment.

Credit/Debit card payments: The pages the students see and the process are managed by Barclaycard and the onscreen messages in the set-up and payment process cannot be changed by the University. However, we will review and improve the guidance given to students (e.g. on card limits/large payments) and the relevant messaging in the registration pages.

Charges for credit card payment is under review following a request from RIO that the service charge should be removed for international students.

**Theme 3: Enrolment**

*"Enhance the processes associated with enrolment and timetabling in order to improve usability, taking account of the specific requirements of particular cohorts such as Erasmus/Exchange and PGT students".*

***System enhancements***

The SLP team has reviewed the current enrolment processes, taking into account feedback from students and staff and has identified several areas for improvement comprised of a combination of cosmetic and configuration changes to help guide students through the process in a more logical and understandable manner. Proposed changes include simplifying the class results screen to show only enrolment components and 'open' classes, redesigning the class search options page, allowing instant validation of class selections and providing a means for students to view their current timetable whilst selecting additional classes. The delivered functionality for managing the processing of enrolments needs to be retained so the enhancements for the immediate term will focus on how information is presented to students. Going forward, Oracle will deliver an Enrolment Web Services Framework which will provide the ability in the future to develop a bespoke 'skin' for the enrolment process.

Program Enrolment functionality which may support automatic enrolment onto compulsory courses is due to be delivered by Oracle but is likely to be a couple of years away. Currently, students are enrolled onto class sections within a course so automatically enrolling them on a course is not a complete solution and would not generate a timetable.

It has been suggested that students should not have a choice about the method of enrolment – it should always be by 'My Requirements' which guides students in their choices by displaying the mandatory, recommended or optional courses for their current Plan. Whilst the system could be changed to force this to be the case it requires a policy decision and consideration of the impact on part-time and Erasmus students. This will be taken forward with relevant stakeholders prior to the next enrolment cycle.

Interfaces with collaborative partner institutions will be reviewed in the coming year and updated as needed to ensure a seamless process for these students.

The 'Quick Enrol' function has caused particular frustration because, even though this is the most efficient way to correctly enrol students in MyCampus, it still requires a large number of keystrokes and is not perceived as being "Quick" – particularly compared to enrolment in WebSURF. In MyCampus, students are being allocated to specific class sections rather than just the overall course and this generates student timetables, class and attendance rosters. Potential improvements to this process have been identified including giving staff a more streamlined list of classes to initially select, displaying the status of classes so it is clear which are full or closed before they are selected and looking at ways to display days and times of related class sections so it is clearer to users which class they are selecting. Setting some user defaults (e.g. Term and Institution) will also make this process slightly faster.

For enrolment processes that require the user to set a certain number of overrides or to follow specific instructions (e.g. Exams Only or Audit Only), the SLP team are considering development of a separate Enrolment page that will allow these overrides to be automatically set based on the 'type' of enrolment being processed.

***Process Changes/Adoption***

Advisers must check and confirm a student's curriculum, particularly in the general degrees to confidently determine that a student is fully enrolled. There is a service indicator (R05) on the record that should be removed by the adviser once the curriculum is checked indicating they agree the student has met the enrolment requirements. If this discipline is applied consistently it would be a clear indicator that a student is properly enrolled.

A complete review of all pre-requisites needs to be undertaken by Colleges and Schools to ensure they are required, accurate and complete. This must also include a review of what information is given to students about pre-requisites. Greater clarity is required about when a pre-requisite can be over-ridden and who has the authority to do so.

**Theme 4 Access to Information**

*"Ensure appropriate access to information through effective management of security and permissions; provision of reports and queries; and enabling access to specific information and data sets e.g. disabled students, absences etc."*

Several queries have been written by the SLP team and are available to users through MyCampus. The team is currently reviewing these queries and will provide more intelligible naming, language and explanations and they will then be made available through web pages. Publication is scheduled for mid December 2011.

An interim solution for ad-hoc reporting using BI Query will be available mid-January. Development of the models and tables which will go into BI-Query is underway. The longer term solution to reporting, including use of OBIEE, will be considered once the interim solution is in place.

SLP Project Management will work with College Support Teams to refine the current levels of permissions in MyCampus. The aim is to align permissions with user roles to ensure appropriate levels of access. This will require the Colleges to clearly define roles and responsibilities within their respective areas.

**Theme 5 System Performance**

*"The performance of the system should be robust and optimised, taking account of user activity profiles".*

System performance is closely monitored and work is ongoing to mitigate any risks. At the request of the Project Board a representative group of users will be created to provide ongoing feedback on performance. Colleges are currently nominating members of staff from each user area to ensure feedback is received from all business areas and geographic locations.

Enhanced performance monitoring tools from Oracle are being investigated in addition to investigations into enhancing the web tier hardware during peak periods such as registration and enrolment / release of exam marks.

Further load testing will be undertaken week commencing 19th December to ensure access to January exam results performs well.

Progress on developing email functionality to allow exam results to be emailed to student's University email address is progressing well and it is anticipated this will be available in time for January. This should, to a degree, help spread the load and reduce overall performance risk. Over time as students become accustomed to the email option it would be expected the load on Campus would further reduce.

**Theme 6 Data Management**

*"Data stored in or generated by the system must be accurate and a comprehensive record maintained".*

***System enhancements***

The data that was migrated from WebSURF was of questionable quality in some instances and a more thorough data cleansing exercise was required. A review of all data has been undertaken in MyCampus and clean-activities initiated where required. Another large scale migration will be required for Direct Admissions and more time will be devoted to data cleansing.

Plan rules have yet to be fully tested by appropriate staff within Schools and Research Institutes. The SLP technical team provisioned a dedicated environment for this purpose which is refreshed weekly with data from MyCampus to ensure up to date information.

**Theme 7: Communication**

*"Improve all aspects of communications through review and revision of the mechanisms for dissemination and engagement with the user community in order to increase understanding of the system and what it will/should deliver".*

The need to rebuild the communication channels and ensure appropriate authority and accountability is recognised as a critical area and there needs to be a collective view on how to address this (see also 'Community Engagement' above).

**Theme 8 Training and Support**

*"Ensure comprehensive training is provided in a timely manner ahead of roll-out of future functionality and establish appropriate support mechanisms to support the roll-out phase"*

Approaches to training delivery and channels used (i.e. online guides/job aids, instructor led, etc.) are being reviewed and revised accordingly. It is recognised that improvement is needed in relation to identifying training needs, defining roles and developing more of an end to end approach to training rather than task-based training.

The timing of training delivery is dependent on the availability of new/enhanced functionality, including changes arising from this review. Therefore a detailed training schedule will be produced once the development plan is approved early in the New Year. It was noted that April was felt to be an optimum time for training staff on functionality they will be expected to use from next Summer.

There is a wide range of resources, including user guides and support materials, currently available on the SLP website. Further promotion of this material and restructuring of the website is underway. Job Aids will continue to be developed for all areas of functionality and will be further enhanced by the proposed development of the short-form Job Aids (crib sheets).

The 'New Business Model Packs' will be updated to map the tasks to be undertaken and the roles/responsibilities to system functionality and security roles, then link to individuals. As part of this some logical thinking about how tasks are undertaken and the impact of process change on individual job roles will be required. The recommendation to work individually at College, School, Research Institute and University Services level to map responsibilities to functionality and access is noted.

Consideration is being be given to provisioning a 'play' environment populated with real data and reflecting the range of anomalies and variables encountered in reality to be used in support of both training and testing. Investigations into security are being undertaken.

9th December 2011