

# MyCampus Lessons Learned Review

## Final Report

February 2012

**Review Panel:**

Mr. Fred Cartmel, Senior Lecturer and Chief Adviser, Social Sciences

Prof. John Chapman, Vice-Principal and Head of College of Science and Engineering

Prof. Frank Coton, Vice-Principal (Learning and Teaching), (Convener)

Ms. Karen Lee, Consultant to SLP Team

Mrs. Janice McLellan, Student Lifecycle Support Manager (Clerk)

Mrs. Lillias Robinson, Head of School Administration, School of Life Sciences

Dr. Don Spaeth, Senior Lecturer, History

Prof. Joe Sventek, Head of School of Computing Science

Mrs. Eleanor Waugh, Student Lifecycle Project Team Advising Functional Lead

## **Executive Summary**

The Lessons Learned Review Panel was created to review the initial implementation of MyCampus, with emphasis on Registration and Enrolment during Summer 2011, to understand the problems experienced and make recommendations for changes and improvements to ensure these are not repeated in future. The Panel has undertaken an extensive consultation with the user community and has tested its findings with that same community. It has also consulted with the Student Lifecycle Project (SLP) team and with staff from Queens University Belfast who had previously implemented the same software platform for their registration and enrolment processes.

The feedback from the user community and the SLP Team highlighted a wide range of problems associated with the software implementation. The manifestation of these problems resulted in an excessive load being placed on staff in Colleges, Central administration and the SLP Team itself during the first few weeks of the academic year. The problems also caused confusion and, in some cases, distress amongst the student community. There is still an ongoing effort to resolve these difficulties.

This report identifies a range of issues some of which are specific to either this project or the software platform and others that are general to large-scale software implementations across the University. Consequently, some recommendations are made that apply to the future development of MyCampus and others that are relevant to other future projects of this type and scale. The scale of the task of improving MyCampus to address the many problems experienced by users should not be under-estimated. The report makes 17 specific recommendations for improvements/changes in communication, user engagement, user interface, training, support and documentation, and policy.

In going forward, it is important to recognise that mistakes were made during the implementation and that these have alienated and angered large sections of the user base. It is imperative now that MyCampus is improved and future developments are properly implemented.

## **Background and Working Methods**

The Lessons Learned Review Panel was created to review the initial implementation of MyCampus, specifically Registration and Enrolment during Summer 2011, to understand the problems experienced and make recommendations for changes and improvements to ensure this is not repeated in future.

The Panel initiated a period of consultation with a range of user groups (Advisers, administrators, students, etc.) comprising a series of meetings, individual email submissions and a review website which was open to comments from all staff. The panel also consulted the SLP team to gain an understanding of the issues that the SLP team had witnessed from their perspective.

The contributions made during the consultation phase were subject to analysis by the Panel, leading to a summary report (Appendix A) describing the key issues which were grouped under the following themes:

- User Interface
- Student Finances
- Enrolment
- Access to Information
- System Performance
- Data Management
- Communication
- Training and Support.

This report was published to both staff and students and their feedback invited to ensure that the issues listed under the themes adequately reflect what was raised by the user community and to allow the user community to indicate the priority they would place on each theme.

In parallel with this second consultation exercise, the Panel met with representatives of the SLP team to discuss the issues raised and to carry out a preliminary investigation of potential solutions. Potential solutions to several of the specific issues raised have already been identified and these are provided in the initial response of the SLP Team shown in Appendix B. This will form the basis for a revised detailed implementation plan that should be shared with the user community in early 2012.

The Panel has also consulted with members of the Queens University, Belfast (QUB) team to discuss their experience of using the system and the solutions they have deployed to overcome difficulties initially experienced with their implementation, particularly those which are in common with the experience at Glasgow. The Panel also explored how the QUB implementation differed from the Glasgow implementation in areas where Glasgow had experienced problems that QUB had not.

The second-stage feedback from the user community (Appendix C) suggests that the issues identified by the panel were representative of the concerns raised in the first consultation phase. In general, the community ranked these relatively uniformly with staff putting marginally more emphasis on the user interface, enrolment, communications and data management and students

highlighting enrolment, the user interface, communications and student finances. Several respondents provided further comment and many indicated that a high priority should be placed on addressing all of the issues.

In the following sections, recommendations are made for changes that could or should be made to policy and practice to improve the staff and student experience of registration and enrolment in the future.

## **Policy Issues**

***Phasing of registration and enrolment:*** At present, students are required to register before enrolling on classes. Registration has two parts; academic registration and financial registration. Overseas students often have particularly complex funding arrangements and many of these students were effectively held up from enrolling on classes because financial registration took a long period of time. An alternative would be to split the registration process into two parts with academic registration happening prior to provisional enrolment and financial registration happening after. This would allow international students to enrol on classes and then either complete financial registration before coming to Glasgow (the normal case) or complete financial registration on arrival in Glasgow by interacting directly with a staff member here. While this approach may have implications for debt collection, it is strongly recommended that the University considers adopting this approach for either all students or, at least, for international students.

**Recommendation 1:** The University should allow students (especially international students) to enrol before completing financial registration.

**Advising:** The remit of the Review Panel did not extend to suggesting modifications to the advising system. It is clear, however, that different parts of the University have different types of interaction between the Adviser and the student during the enrolment process. In the general degrees, the flexibility of student choice necessitates an interaction between the student and the Adviser to either validate the choices the student has made or advise the student on appropriate choices. While no specific recommendation is made in respect of policy here, we note that it is the expectation of the advising system that, in all but a limited number of the professional degrees, Advisers should have contact with students as part of the process of ensuring that students have selected an appropriate curriculum. We feel this is sensible. The timing of this interaction will depend upon the specific degree programme and may happen either before or after students have enrolled on courses. In the latter case, this should happen when there is still time to make adjustments to the student selections. In some areas, in the former general faculties, Advisers are now being expected to enrol students on honours electives for the first time. This should be considered as part of a review of the advising role.

**Recommendation 2:** The University should review the relationship between MyCampus and advising and the role of advisers in MyCampus.

**Guiding Student Choice:** The concept of student choice is enshrined in the MyCampus system but the system currently allows students to make choices that are not compatible with their programme

of study. At present, students can bypass “My Requirements” and make course selections in an unconstrained way from the course catalogue. This introduces a degree of freedom within the system that students should not actually have and this has contributed to some of the problems experienced this year. For this reason, it is recommended that the option for students to bypass “My Requirements” is removed. This will ensure students have choice where it is appropriate to have choice.

**Recommendation 3:** The option for students to choose courses directly from the course catalogue should be removed, so that they have to use MyRequirements.

### **Overarching Operational Issues**

In addition to the specific themes identified during the consultation, there are some over-arching issues that must be addressed. These are as follows:

- 1 A clear and shared vision of ownership of what the system should look like and what it will deliver for the user community must be established. That said, we accept that no implementation will satisfy completely all the requirements of all users. Nevertheless, if this is done correctly, the community will be adequately prepared for and will understand the scale of change associated with future phases of the implementation of the project. Where standardisation of process has already been agreed, this must be implemented if future operating benefits are to be gained. Ultimately, the success of the implementation will depend on realistic expectations being set and delivered against. As things stand at the moment, there are very different views amongst that user community about what MyCampus can currently deliver and what it is expected to deliver in the future.
- 2 To achieve 1 above, there must be a much higher priority put on communications with the user community. The revised project plan should be shared with the community and there should be regular reports on progress.

**Recommendation 4:** The revised SLP project plan, as well as regular reports on progress, should be shared with the University community.

- 3 It is essential to clearly establish where accountability lies for delivery across various areas in the University. In revising the engagement mechanism it is essential that the staff involved have the necessary accountability/authority to ensure previously agreed procedural/system changes are actually implemented. This encompasses not only the Project Team and the Project Board but also those in Central Services and in the Colleges who have a role to play in developing and delivering the system.
- 4 In relation to 3 above, the communication lines that pass information to and from the SLP project team must be urgently revised to ensure that information reaches the appropriate individuals in a timely manner and that these individuals are clear on who to contact within the SLP team.

**Recommendation 5:** Information about contacts within the user community and the SLP team should be published widely.

- 5 In responding to the problems during the implementation phase many workarounds were put in place as overrides to established policies. In a fully functional state the system must

be configured to comply with these policies. In moving forward it is essential that these policies are implemented correctly by all constituents and adhered to.

- 6 Usability and the user experience of both staff and students must be given a very high priority in MyCampus and the way different categories of users interact with the system must be clearly defined "*a priori*". All system configuration, testing and user training must be consistent with this.

**Recommendation 6:** Usability and the user experience of staff and students should be given the very highest priority.

- 7 In relation to point 6 above, particular emphasis must be put on ensuring compatibility between MyCampus and the role of Advisers of Study such that MyCampus properly supports the intended role of the Adviser. In this respect, an Advisers' MyCampus handbook should be produced to provide guidance on how the Adviser interfaces with the system to fulfil his/her role. A similar approach would also be appropriate for key administrative staff.

**Recommendation 7:** MyCampus handbooks should be produced for Advisers, administrative staff and appropriate academic staff.

- 8 The current mechanisms to channel the concerns of the user community to the Project Board are not working effectively. This should be addressed immediately. It is recommended that the membership of the Board is changed to include two new members who can represent the user community more effectively. Specifically, a member of staff representing the administrative users and a member of staff representing the academic users should be added to the Board. These individuals should, in turn, convene user groups from the communities they represent and should express the views of these groups at the Board. Administrative support for both of these groups should also be provided to ensure they operate successfully. In order to secure the short term goals the proposed user groups should be set up initially as transitional groups to oversee the introduction of changes identified by the user community ahead of 2012/13. It is anticipated that in the longer term user groups will continue and the remit of these groups should be fully defined and membership established.

**Recommendation 8:** Two new members should be added to the Project Board to represent the user community, including one representing administrative users and one academic users. Each individual should convene a user group, which should receive administrative support.

- 9 An appropriate cross-section of the user base must be directly involved in the process of identifying refinements across the system. This should happen before sign-off of the new requirements. The two groups identified in point 8 above could provide this input. A broader cross-section of the community should then be involved in comprehensive system testing and bug-fixing. Finally, comprehensive training should be provided in a timely manner ahead of roll-out and appropriate support mechanisms should be put in place to support the roll-out phase.

**Recommendation 9:** The user groups should be involved in comprehensive system testing.

**Recommendation 10:** Comprehensive user training should be provided in a timely manner ahead of roll-out.

**Recommendation 11:** Appropriate support mechanisms should be put in place to support users during the roll-out phase.

- 10 In moving forward with addressing the issues raised and ensuring MyCampus is fit for purpose the operational/support implications such as the management of security and access; training and support; and the further development of user guides and support materials must be fully assessed and provided for. The current provision of user guides and quick reference guides is inadequate and this must be urgently addressed.
- 11 The project implementation protocols must be more robust. These include; requirements gathering, specification and design approval, development, testing and training. Protocols were in place but these did not work effectively.

**Recommendation 12:** Project implementation protocols should be reviewed and made more robust.

- 12 User acceptance testing and training must seek to replicate 'real life' experience and scenarios in order to fully test the system and prepare users for live operation. Consideration should be given to creating a replica of the live database to allow users to be trained in real scenarios.

**Recommendation 13:** If possible, a replica of the live database should be provided to facilitate user testing.

- 13 The academic plans that were developed ahead of the implementation require to be checked to ensure progression rules etc will operate correctly. It is recommended that serious consideration is given to securing the services of an individual or group of individuals to review the plans in a holistic way rather than relying solely on the individual plan builders to do this. There is a lack of consistency in the style of the plans that should ideally be addressed as this potentially impacts negatively on those first year students whose programmes involve contributions from different disciplines and on joint honours students.

**Recommendation 14:** The services of an individual or groups of individuals should be secured to review academic plans in a holistic way.

### **Recommended Actions and Timescales**

The SLP team have developed a preliminary assessment of changes that can be made to MyCampus to address the issues raised under the specific themes during the consultation (Appendix B). This must be evolved into a project plan, with clear milestones, that can be shared with the user community by mid-February 2012.

In developing this plan, there are immediate issues that should be addressed by mid-February 2012

- Queries – a bi-query tool for MyCampus should be introduced as soon as possible
- Permissions – individual access to data should be determined with Colleges and University Services and permissions set accordingly. The list of users/permissions should be updated regularly.
- Communication lines – accurate lists of Advisers and administrative staff and their roles should be created to facilitate future communications.

**Recommendation 15:** Issues concerning queries, permissions and lines of communication should be addressed immediately.

Members of the Lessons Learned Task Group have produced lists of tasks, at operational level, that have been identified through the consultation. These will be passed to the new User Groups and the SLP team to inform their work and to allow the changes to be progressed within the timescales noted below.

Any major changes to the system should be completed by late April to allow time for training and familiarisation. The plan should also include a clear schedule for the start of registration and enrolment for the academic year 2012/13. The Group recognise some of the changes may require longer term solutions.

A properly trained and adequately staffed “Help Desk” should be set up to help students through the mechanics of registering and enrolling in classes such that Advisers are not inundated with queries. The target response time from this help-desk should be less than 24 hours.

**Recommendation 16:** A properly trained, adequately-staffed and appropriately empowered Help Desk should be set up to assist students with registration and enrolment.

The Project Board should ensure that the resources identified to support the plan are provided and are appropriate. They should also ensure that appropriate monitoring is put in place to ensure actions are progressed as planned.

### **Implications for Future Projects**

Considering the broader implications of the experience and the critical learning points for the University, the Panel has identified the following matters for consideration which transcend the specific implementation of MyCampus:

- The tensions within any project of managing time, functionality and resource must be carefully balanced in order to deliver an effective and appropriate system. The MyCampus implementation was primarily constrained by time and resource (missing the go-live date would have introduced a 12 month delay and significantly increased expenditure), which compromised decisions around, and full consideration of, delivered functionality.
- Consideration needs to be given to the make up and operation of project boards for major projects to ensure utilisation of appropriate expertise, effective community engagement and rigorous testing of assumptions and decisions. This may involve introducing some new members and standing others down as the project evolves.
- A representative user group should be involved in the specification, development and testing of the solutions identified and future system enhancements and upgrades.
- Clear lines of communication and responsibility must be established and understood prior to roll out – identifying who to speak to when help is needed, who can resolve problems. During registration and enrolment with MyCampus, unrealistic expectations were placed on, for example, Advisers of Study because lines of communication and responsibility were not clear.

- Communication and engagement with the user community must be given a very high priority, with input and feedback being properly acknowledged and responded to. The communication lines used in support of the MyCampus implementation were fractured during the restructuring of the University and not enough effort was put into re-establishing these as the project moved forward.

**Recommendation 17:** In undertaking any substantial project in the future, the University should learn the wider lessons from the MyCampus implementation captured in this report. Specifically, robust project governance and best practice in project management disciplines must be employed, allowing adequate time and appropriate user engagement at each stage. Benefits management should be fully embedded from the outset such that success criteria are clearly identified and understood by the user community as a whole.

## **Concluding Remarks**

The implementation of MyCampus has been extremely problematic and caused considerable upset in the staff and student communities. Despite this, staff from across the University went to extreme efforts to support the students during this difficult time. Nevertheless, the load placed on the staff was unacceptable and the “lessons” from this review must be “learned” if we are to avoid problems of this type in the future.

The introduction of the new advising system was outside the panel's remit, but the usability and design of MyCampus is intimately linked with the nature of advising in future, to ensure that students get the advice they need and that the burdens on Advisers are not increased. This needs further consideration going forward.

Finally, the University community as a whole must accept that achieving the desired improvements and deriving the benefits to which we aspire is a shared responsibility – it is no one person’s or one team’s job to make this work. The Review Panel also recognise that the insight they have gained during the review period could be useful to the project going forward.

The Panel is extremely grateful to those who have contributed to this exercise in such a constructive manner.

### **Summary of Recommendations**

**Recommendation 1:** The University should allow students (especially international students) to enrol before completing financial registration.

**Recommendation 2:** The University should review the relationship between MyCampus and advising and the role of advisers in MyCampus

**Recommendation 3:** The option for students to choose courses directly from the course catalogue should be removed, so that they have to use MyRequirements.

**Recommendation 4:** The revised SLP project plan, as well as regular reports on progress, should be shared with the University community.

**Recommendation 5:** Information about contacts within the user community and the SLP team should be published widely.

**Recommendation 6:** Usability and the user experience of staff and students should be given the very highest priority.

**Recommendation 7:** MyCampus handbooks should be produced for Advisers, administrative staff and appropriate academic staff.

**Recommendation 8:** Two new members should be added to the Project Board to represent the user community, including one representing administrative users and one academic users. Each individual should convene a user group, which should receive administrative support.

**Recommendation 9:** The user groups should be involved in comprehensive system testing.

**Recommendation 10:** Comprehensive user training should be provided in a timely manner ahead of roll-out.

**Recommendation 11:** Appropriate support mechanisms should be put in place to support users during the roll-out phase.

**Recommendation 12:** Project implementation protocols should be reviewed and made more robust.

**Recommendation 13:** If possible, a replica of the live database should be provided to facilitate user testing.

**Recommendation 14:** The services of an individual or groups of individuals should be secured to review academic plans in a holistic way.

**Recommendation 15:** Issues concerning queries, permissions and lines of communication should be addressed immediately.

**Recommendation 16:** A properly trained, adequately-staffed and appropriately empowered Help Desk should be set up to assist students with registration and enrolment.

**Recommendation 17:** In undertaking any substantial project in the future, the University should learn the wider lessons from the MyCampus implementation captured in this report. Specifically, robust project governance and best practice in project management disciplines must be employed, allowing adequate time and appropriate user engagement at each stage. Benefits management should be fully embedded from the outset such that success criteria are clearly identified and understood by the user community as a whole.

## APPENDIX A

# Student Lifecycle Project Lessons Learned

Summary of Key Issues

## Introduction

This document provides a summary of the key issues identified through the consultation stage of the *Lessons Learned Review of the Student Lifecycle Project* and groups these into eight themes. It provides a statement of intent in relation to each theme along with examples of the issues that have been raised with respect to the theme. The first five themes are predominantly associated with the MyCampus system and the final three relate more to the human aspects of implementing and supporting the system.

In identifying the key issues and subsequently formulating recommendations for developments and enhancements to address these, we are conscious that there are a number of 'Year 1' issues which are an inevitable feature of any new system implementation and which we would not expect to recur in future years.

## Overarching Issues

In moving forward, and in addition to the specific themes identified in this document, there are some over-arching issues that must be addressed. These are as follows:

- 1 There should be a clear and shared vision of ownership of what the system should look like and what it will deliver for the user community. If this is done correctly, the community will be adequately prepared for and will understand the scale of change associated with future phases of the implementation of the project.
- 2 It is essential to clearly establish where accountability lies for delivery across various areas in the University. In revising the engagement mechanism it is essential that the staff involved have the necessary accountability/authority to ensure previously agreed procedural/system changes are actually implemented.
- 3 In responding to the problems during the implementation phase many workarounds were put in place as overrides to established policies. In a fully functional state the system is configured to comply with these policies. In moving forward it is essential that these policies are implemented correctly by all constituents and adhered to.
- 4 Usability and the user experience of staff and students must be given a very high priority in MyCampus and the nature of human interaction with the system of the different categories of users must be clearly defined "*a priori*". All system configuration, testing and user training must be consistent with this.
- 5 In relation to point 4 above, particular emphasis must be put on ensuring compatibility between MyCampus and the role of Advisers of Study such that MyCampus properly supports the intended role of the Adviser.
- 6 An appropriate cross-section of the user base must be directly involved in the process of identifying refinements across the system. This should happen before sign-off of the new requirements. A broader cross-section of the community should then be involved in comprehensive system testing and bug-fixing. Finally, comprehensive training should be provided in a timely manner ahead of roll-out and appropriate support mechanisms should be put in place to support the roll-out phase.

## **Process**

The user community will be invited to review this document and provide responses to:

- a) confirm that this summary adequately covers the range of issues identified?
- b) rank the themes identified– in order of importance

## Summary of Issues

### 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”.

#### *Issues:*

- Overly complex navigation
- Screen layout and system use unintuitive
- Language & Terminology (including: Americanisms; consumerist language; use of codes rather than text; differences from standard University terminology)
- Staff & students do not see same screens / information
- Visually impaired students cannot use the system independently
- Context is not maintained between screens
- Poor Adviser interface
- Interfaces with other systems not fully operational / not working as required (e.g. Moodle, accommodation, Library)
- Incompatibility with web browsers (e.g. Chrome and Safari)
- No clear confirmation message when a process is successfully completed
- A single logical change requires multiple changes to be performed in different screens
- Multiple steps (too many mouse clicks) for every task
- Error messages not intelligible

### 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”.

#### *Issues:*

- Incorrect fees recorded
- Process appears to be optimised for “normal” case (SAAS-funded students) and does not support non-standard cases well
- SAAS-funded students’ tuition fee appearing as a potential debit against their account without clear explanation.
- Advance payments, deposits, discounts and scholarships not reflected on account
- Language, process & navigation unclear - no confirmation of successful completion
- Verification of sponsorship taking undue time and preventing completion of registration
- Trivial debts prevent registration & enrolment
- On-screen messages/information can be misleading
- Full range of payment options not shown/available
- Range of problems specific to international students (including banking arrangements)
- Delays/errors in payment of bursaries/stipends

- Direct debit problems
- Linking enrolment to successful registration leads to problems
- Credit card charges not made clear
- Lack of (staff) access to student financial information
- Problems with card payments because payment often exceeds maximum allowed by card company

### **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”.

#### *Issues:*

- Lack of clarity for staff and students around the best methods to use in particular situations
- Timetable clashes were identified by class numbers (codes) with no indication of the class type, lecture, lab, tutorial etc, or course to which they related
- Timetable clashes are identified late in the process and cumbersome to resolve
- Process of enrolling is complex and not intuitive (e.g. use of 'view all' is not obvious)
- 'My Requirements' not working on occasions or not obvious, so not used
- Incomplete or errors in class scheduling contributed to difficulties and confusion
- Pre-requisites were inflexible, leading to much time spent managing, updating and over-riding
- Advisers spent too much time taking students through the mechanics of the process, leaving little or no time for curriculum discussion or advice
- Incorrect program/plan information recorded
- Erasmus/Visiting Students: arrangements for both incoming and outgoing students were not explained early enough
- Students were not aware they had to enrol for both semesters
- Course lists not appearing consistently for course selection
- Quick enrolment is not quick
- Student Groups were not fully set up or explained to relevant staff prior to implementation.

### **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.

#### *Issues:*

- Management of security access and the lack of a security/permissions led to:
  - Staff being granted insufficient access
  - staff not being able to access/update information to do their jobs and/or assist students
  - Lengthy delays in responses to requests for access
- Lack of access to disability information for Advisers and course organisers

- Delays or problems with the issue of student 'Account Access' information compounded other issues
- Lack of reporting tools means staff are reliant on SLP team to create queries
- Delay in the introduction of absence reporting
- Organisation of existing queries is hard to understand – no consistent naming conventions or information on the content
- Classification/glossary of existing queries required
- Full functionality of absence reporting must be achieved
- Reporting tools so that staff can create their own queries are needed
- Exception reports are not easy to use – lengthy text files, cannot be moved to Excel. – additional fields needed, including plan name
- The facility for a Chief Adviser to see another Adviser's list of advisees should be available
- Lack of a code for "year" (e.g. Sing Hons Politics Year 3) makes it laborious to send class emails.

### **Theme 5: System Performance**

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

*Issues:*

- Slow response/processing times
- Unintelligible error messages
- System is prone to freezing
- Time outs occur after relatively short time and do not take account of browsing for information as opposed to completing defined actions in the system
- There is no automatic update from one screen to another
- System is too interdependent, increasing both complexity to users and causing degradation of performance.

### **Theme 6: Data Management**

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

*Issues:*

- Lack of data cleansing prior to migration
- Questionable quality of data in the system
- plan rules not adequately tested, especially for joint/combined programmes (lack of ownership/coordination creates problems for some joint/combined programmes)
- Prior history/qualifications not imported from WebSURF
- Data Integrity has not been preserved
- Some students have multiple records on MyCampus
- Incorrect allocation/assignment of students
- Staff were not asked to contribute to data cleansing/data checking (beyond checking course and programme data)

## **Theme 7: Communication**

“Improve all aspects of communications through review & 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”.

### *Issues:*

- Poor communication & collaboration with users during implementation
- Staff and students do not know who to contact for help in resolving problems
- Staff were unaware of communications issued to students
- Insufficient information provided to users on new tasks and new features
- SLP Co-ordinator role as communication channel to Schools and Colleges was not successful as implementation approached
- Management of communications and information
- Communications with all stakeholders (students, Advisers, course co-ordinators, Disability Co-ordinators)
- Lack of clarity regarding responsibilities and communications
- Use of call centre leading to student anxiety
- Confusion over the use of ‘MyGlasgow’ and ‘MyCampus’

## **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”

### *Issues:*

- Insufficient time for training, hence delivered too late, and inappropriately focussed and inadequate
- Identification of appropriate staff to undertake support roles did not take place in time for training to be organized or appropriate system access arranged
- The impact of the complexity of the system was underestimated
- Range of staff for whom training was provided was limited – with some not targeted at all
- Lack of information and training for staff responsible for PGR students
- Better and accurate guidance, support materials and job aids should be provided
- Lack of adequately trained staff available in sufficient numbers to respond promptly to problems over the summer period
- Assistance provided through Helpdesk or Supportworks involved lengthy delays
- Staff and students were not well supported.
- Problems were passed from place to place due in part to a lack of ownership of problem resolution
- Multiple channels leading to duplication of calls and activity
- The support infrastructure was ill-conceived, poorly coordinated, with roles and responsibilities among the participants not well thought through.

# Appendix B

## Initial Response from SLP Team

### 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 are 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 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.

# APPENDIX C

## Summary of Outcomes from Second Stage Consultation

The Task Group agreed at its first meeting that consultation with users should be sought twice: first to identify the main problems experienced with registration and enrolment through MyCampus, and again after findings had been collated to identify priorities. As the report states, the perception that users have not been consulted or listened to is widespread, so users must be involved fully in efforts to remedy problems with the system.

### Statistics

Users were asked to indicate what priority should be given to addressing each of the eight themes identified by the report. This is not a straightforward task since each of the themes covers many problems with the system. Nonetheless, it was hoped that user priorities would enable aspects of the system to be ranked in the order in which they needed attention.

265 students and 88 staff responded to the survey.

The following table shows how staff and students prioritised the themes. The prioritisation is derived from a weighted score calculation which takes account of all scores for each theme. The percentages indicate the proportions where the theme was rated 'high priority'.

Students (n=265)			Staff (n=88)		
Priority	%	Theme	Priority	%	Theme
1	66	Enrolment and Timetabling	1	83	User Interface
2	49	User Interface	2	74	Data Management
3	52	Finance	= 2	75	Communication
= 3	44	Communication	4	69	Enrolment & Timetabling
5	42	Data Management	5	55	Training & Support
6	37	System Performance	6	57	System Performance
7	25	Access	7	57	Access
8	27	Training & Support	8	50	Finance

### Observations on the feedback

- As one would expect, student and staff reactions to the system differed somewhat, since they engage with system in different ways. This explains the greater student emphasis on enrolment and timetabling and of staff on data management and communication.
- Both students and staff placed a high priority on the user interface (83% of staff and 49% of students).
- Staff typically expressed stronger feelings about the system than students, with 64% of staff respondents identifying all eight themes as priorities or high priorities. Although student priorities are stated less strongly, some 42% of them identified all eight themes as priorities.

## Comments

Students and staff were also given an opportunity to comment on the report: 91 students and 56 staff did so.

Both groups considered that the report provided a comprehensive view of the problems encountered and an honest reflection of the comments made.

Of those students who responded just over 10% reported continuing problems which need to be resolved. A further (approx.) 10% commented on matters outwith MyCampus, such as Moodle, other University systems, teaching. The remainder were general comments.

Staff comments expressed frustration, especially where there are ongoing problems, and a general concern about the feasibility of 'fixing' the range of problems identified within a reasonable timeframe.

There were a number of comments made about the advising system and interactions between advisers, students and MyCampus. This clearly remains a matter of concern.

A number of people commented that the report did not go far enough in terms of the factors which were included in the review. However, it should be noted that the Lessons Learned Panel had a very precise remit and conducted the review within the terms and scope of this.

A recurring message from staff related to communication, with people often feeling they haven't been listened to or consulted. As noted elsewhere in this report this is a key learning point for the University and something to be addressed as matter of priority.