Blog XCRI CAP project - UWE

March 2013

Final blog

The final report is produced and ready for sign off by the sponsors. The last work is done on the feed, in order for it to ready for production and for the business to add the courses when the data quality of the course is correct.

The UWE JISC project website will be updated with all the products that have been made during the project.

After the project

After March the project JISC-XCRI will stop, but work will still continue on the data quality, online form for data collection. If the aggregators and particularly UCAS will use the feed, production of the UWE feed will resume. If the business cases show there is value in continuing some work, this will be managed as business as usual.

This project has been very helpful in getting a good insight in the course data collection process, it helped people in different departments to communicate together and will help in improving the data quality of the courses within UWE.

Final report

Work is done to make the final report, clean up the project site, do the surveys and manage the budgets. Also some business cases are made to make sure the business don't lose the momentum of change. The marketing and admissions team would like to see the feed working for their internal processes, even if the external aggregators are not present yet. But this needs to be offset against the work needed to get all courses clean for the feed.

Review feed

JISC has reviewed the feed and apart from a few suggestions, it was accepted.

UWE has managed to be the first to ask for the review.

Data feed testing

We have managed to get the data feed through the validation process and can now finally see the end product on the aggregator site. The search options of the aggregator by K-INT, is seen is a very helpful tool to solve our search engine problems on the UWE website. The IT development team have now stopped working on the project, but there are still some issues left, one of which is the option to add courses to the feed by the business.

Data feed testing

The development of the Data feed is on track. We have mastered the technical issues and are now testing the actual data on the feed. We still have some issues: one field is mysteriously deleted from the database; some courses have missing links to the location fields.

The business have started to test how it looks like, but find it difficult the view the courses in the xml format. And since we have no validated feed yet, we can't show it in a different format.

The feed will still only contain a small number of the courses, but the IT department will leave an option to add courses to the feed without having to ask for their resources.

Online form and To Be processes

Continuation of work on the online form and the To Be processes. Reviews of the online form are good, a sponsor from another project have taken this form on board to lead it further after the JISC XCRI project has finished. It improves bit by bit, almost done as far as the data on the form are concerned. Then work needs to be done on the views for the different stakeholders.

To be processes are completed as far as the new programmes and change programme processes are concerned. The new maintenance processes for the feed have to be reviewed in the next weeks. The board has signed off the new and change programme processes.

Final report (draft)

The project manager has worked hard to make the draft version of the final report. JISC has reviewed this and came up with helpful suggestions for the final report.

Online form and To Be processes

More work is done to design the online form. The form needs to be reviewed now. We have made a master record form, we have done an analysis on who makes, updates and views the course information. Overall goal is to improve the visibility and availability of the course information for everyone involved. We are also solving the technical challenges of designing good forms and workflows without adding too much complexity.

The To Be processes are in review. The processes will show an improvement on the handling of the course information by integrating course information, cutting down on tracking systems and improve the trail for getting the course information details.

Work is also started to make sure the projects recommendations will have a follow up in the organisation when the JISC funding stops.

JISC and Show and Tell Event

Work is been done to present the project to the JISC Show and Tell event. We have made a presentation in Prezi and a poster. Unfortunately the resolution of the Prezi download was not good enough to present the Prezi page on the poster.

We have also started to work on the final draft, which needs to be ready at the end of January.

December 2012

Online form

The XCRI project and the improvement of the course approval in QMEF will jointly design a new online form for course information.

To Be processes, online form and workflow

Start of the TO BE processes based on the recommendations list. A workflow is being developed to use with the current SharePoint site. Also an online form is under development. First review is positive.

Federation process

A meeting was scheduled to discuss the process of marketing federation courses. Since the government has changed the HEFCE codes for a number of partners of UWE it has been difficult to process this information. The meeting was successful in bringing together all stakeholders and to define a way forward. A next meeting will be scheduled.

Benefits/impact analysis for change

The benefit work we did before now has resulted in a benefit document that will be presented to the board. These benefits have been discussed and prioritised by the team. Work that we can do to change the current situation within the project or after the project has ended, has been documented. Some of the changes we can do during the project, but a number of changes will have to proceed by the business as part of business as usual. The document will document an owner of the change.

Start of the development of the data feed

We have started the feed development on the basis of the exemplar courses. Still some issues left, but development can start. Planning for development and test discussed. All exemplar courses now checked.

November 2012

Present input for external sites

Presently UWE will provide data for a number of sites:

- UCAS will ask for extra input to their website data collection.
- UCAS will then provide the HE information to Hotcourses.com. The non HE information on Hotcourses.com is no longer provided via the UCAS route. The information became out of date and needed extra work to update the non HE information.

- Masterscompare have offered space on their website. This request is currently under investigation.

We have made a list of the fields these 'aggregators' will ask and how well the XCRI data feed would solve the manual updates necessary for complying with these aggregators. To be continued …

Exemplar course Check

We have checked three of the exemplar courses. All fields are present in SITS, except for Mode of Attendance, Attendance Pattern and Study Mode. We have identified that a course that is taught at St. Matthias needs to be recorded as main campus for finance reasons. This will be another issue to research the impact of.

JISC

Interim report made and reviewed. The project manager and Business analyst have been to conferences: Exeter Criate, XCRI progress meeting.

It was very good to meet other universities that deal with the same problems. More ideas about benefit measurement and the feeling UWE is not too bad off. Most processes are in place, but need updating rather than starting from scratch. Also UWE does not have to deal with the modules as part of the recruitment; this is done via other systems.

Stakeholders

Talking with other projects, like during the Exeter CRIATE conference, we discussed adding other stakeholders to the review processes. The academic staff is owner of the data, but the process owners are Corporate and Academic Services, Admissions and Marketing & Communications. After discussion in the board it was decided not to include the academic staff as stakeholders. Other group to be looked at might be students who use the course information. This is currently not asked as part of consumer surveys.

Recommendations for improvement of the course information

The recommendations we are going to present to the board are categorised in process changes, IT changes and changes with a big impact. Process changes are to be implemented in the scope of the project. IT changes will probably be met after the project and will need to be planned. The other changes need to be reviewed and an impact analysis made. We have started to work on an impact analysis.

Vocabularies

We still have a problem of identifying the right place for the items that will use vocabularies. Terminology is one issue, but also where the information would come from if we don't use the term in this way already. Example is: Mode of Attendance/Campus or Distance: we currently record distance learning as part of the delivery text and will add this to the title, but we don't record this anywhere else in the database. Three issues here: a change in the terminology we use, how will we get the information and where do we record it.

Also subject is under investigation: should we follow JACS coding or add coding that marketing finds useful?

But this is almost the last of the mapping issues. Data quality improvements are left to tackle and are already underway.

Exemplar courses

We have identified six courses that we will use to validate the feed and show it through the aggregator validation. They are showcasing the different type of courses and the different intakes and locations of courses. We have already identified a number of exceptions in even the reasonably normal courses!

Benefits measurements/Requirements

Based on the course marketing strategy use cases are made to reflect a number of personas who would benefit from the data feed. This is then used for completing the requirements for the data feed and the business processes.

Federation partners

On the JISC meetings contact was made with Hazel English from the City of Bristol College, a federation partner. We identified a problem with how to present courses that are part of a partnership where the other provider now holds the HEFCE code. The marketing of UWE does not show this change yet. This adds a process to be reviewed and it has links to our Academic Partnership project.

Resources

Lead member of the team for admissions left UWE, so a little slippage in the project. Luckily admissions tried to fill the gap quickly.

October 2012

Technical
Technical discussion

Will the feed be made from the SITS xml file which will also feed the public facing web site or will a separate web service be made to serve both feeds? Since resources are tight, the feed will be made directly from the database and not interfere with the live web site.

Any development for the WEB will not be processed during the XCRI project unless necessary for keeping the production web site going after some changes have been made, but recommendations will be made to improve search functionality on the UWE website.

Ultimate goal is to get to one web service that serves the UWE WEB site as well as XCRI, but this will be outside the scope of the project.

Work Packages 7 to 11

The content of the Work Packages are reviewed. The development of the data feed will start, but resources of IT still tight. The priority does not lie with the XCRI project. If time is available the work will start whilst still continuing to improve the data quality or find solutions to the last issues. Requirements are made and under review. To Be processes work is to start.

Structure problems in SITS

The presentation side of SITS does not show all occurrences for all kind of reasons: how applications work or for finance reasons. Any decision on this affects other systems. It is therefore not possible yet to include all instances of a course. Recommendations will be made to improve this in the future if we can't solve this during the XCRI project.

For now: the data feed will be made in the basis of one occurrence with improvements of data in SITS (only mandatory) to be able to make the feed with exemplar courses. This feed will be made by Business Systems or ATG and will surpass any production system outside SITS.

Data flows

Where is a data field made in the process? The data flow diagram shows that the same information is used a number of times and always added manually again from a word document. An online form would benefit this process greatly. This will be part of the recommendations, if we can't improve it during the scope of this project.

Business processes

The As Is processes are documented and recommendations for improvements are discussed at board level.

- 'New programme' process: Course Approval (CAS, already present), Course recording (AID, M&C, present as a workflow) agreed. This will be published on the UWE internal website
- Change programme process discussed, to be reviewed
- Recommendations for TO BE processes: some areas of possible changes identified,
  - Some will be part of the review of the Quality Management and Enhancement Framework (Course Approval Process),
  - Some can be taken on by the JISC project,
  - Some will be put on a wish list.

Mapping current SITS usage to requirements of the data feed from XCRI

We have gone through this several times, but progress is difficult because of the problem with the way SITS is currently structured.

If no current field available, we will try to find a solution in adding narrative fields or adding content in records on SITS or identify business rules to solve the issue: we have identified a number of solutions for the mandatory fields only, but some fields still issue:

- Usage of XCRI required vocabulary in particular different usage of Mode of Attendance,
- Start date of presentation: which start date to enter here and where to enter the actual data
- Subject field: according to JACS?

Work is done to find 'exemplar' courses. We can use them to validate our decisions, to make the feed with proven data and to test the feed against it.

Course marketing strategy

M&C have identified a course marketing strategy, as part of an overall marketing strategy. The timing of this was not easy; the overall business strategy was not ready yet. This strategy was used for identification of areas of interest for the course data feed.

August 2012

Overview systems

Course information is at the heart of the universities business. It is a complex area and most staff will know only parts of the overall system architecture and how they are linked. The business analyst has made a context diagram to show course information from the concept to marketing it via website and from admissions through the student journey. This was very helpful to understand the complexity of recording course information within the university. The diagram is now used more widely in UWE to clarify the system architecture.

Business Case Agreed

UWE is seeking to find improvements on the following items:

Improve applicant experience, improve coverage for 'hard to find' courses, improve data quality, achieve process efficiencies, provided clarity about the workflow for course information, better monitoring customer behaviour, improve management information about unmet course's needs, improve efficiency data input, improve time to market courses.

July 2012

Mapping data dictionary XCRI-CAP to UWE data

Work has started on mapping the data to be used for the data feed, based on the JISC XCRI data definitions document.
The good news is: a number of items are easily mapped to available narratives in SITS.
The bad news is that most of the vocabularies of XCRI-CAP are difficult to map: UWE uses free texts fields to show on the website, which makes it difficult to find extra discrete fields in SITS. Also the XCRI terminology for certain fields is used differently. An example of this is: Mode of Attendance is not used; Study mode is currently free text Delivery.
The standards discussion would impact the whole university from Course approval to Student recording. Decision made to enter the fields in SITS, but don't change the usage of mode of attendance through the university, but translate where necessary.
The guidelines that Marketing has developed to improve consistency will be updated if necessary.

Planning Work packages

13 Work Packages are developed to make sure the data feed is produced and a business process is built around it and can sustain after the project. Work has started on Work Package 5 and 6, with emphasis on the data mapping. Work Package 3 and 4 also in progress.

Resourcing

This is getting better: Project manager and business analyst from ITS Services are on board.

March- April 2012

Proof of Concept

The proof of concept showed that the best option for UWE for the feed would be the SITS 'course database'.

The student administration system SITS:Vision (Tribal) is used for the admission and marketing only. The student journey is recorded in the- in house developed- Ingres Student Information System (ISIS) system. SITS sends out an xml file, which is used for presenting the courses on the public facing UWE Website.

Modules are currently not recorded on SITS, unless they are also recruiting as Professional Courses. The marketing of the Professional courses via the UWE web page is variable: some faculties only recruit the top 20 of their courses via the website; bespoke courses will not be marketed.

Planning and Resourcing

The Work plan is developed, but there is a resource problem: Admissions are to lead this project, but limited resources available and the project manager left UWE, also IT have limited resources available.

Start of the project

Funding is acquired, admissions to lead this project. Marketing& Communications and IT services will provide team members. A project team is set up.