

**Information Services
Knowledge Strategy Committee**

20 February 2008

EUCLID Project

Brief description of the paper

This paper provides the Knowledge Strategy Committee with an overview of the EUCLID Project since the last update on 17 October 2007.

Action requested

For information

Resource implications

Does the paper have resource implications? No

Risk Assessment

Does the paper include a risk analysis? No

Any other relevant information

Paper to be presented by

To be presented by Dr Veena O'Halloran (Project Director) and Dr Bruce Nelson (Project Sponsor)

Freedom of information

Can this paper be included in open business? Yes

EUCLID:

Edinburgh University Complete Lifecycle Integrated Development

1. Introduction

This paper provides the Knowledge Strategy Committee (KSC) with an update on the EUCLID Project ¹ following the first go-live and on plans for the remainder of the project, 2008-10.

2. EUCLID Vision

As part of its cross-cutting supporting goal of delivering quality services, the University has a strategic target to *'agree a plan for radical business process simplification and re-engineering in the student record area'*. EUCLID 's primary objective is to develop a streamlined, modern approach to interacting with applicants and students which reflects our international standing and the calibre of our teaching and research. This involves:

- using online technology to communicate with speed and facilitate global access;
- reducing paperwork so that the focus is on core University activities - teaching, research and supporting students and the University;
- developing integrated, efficient processes to be used across the University;
- sharing a single student system that provides accurate student information to everyone who needs it.

3. First go-live

New software to support undergraduate admissions was first implemented on 19 October 2007, just four days after the scheduled date. The new software provides a significant step towards paperless working, and is increasingly providing benefits as users become more familiar with it. Feedback from Tribal is that our implementation is the most advanced web-based admissions system in the country. We are also getting positive responses from applicants to new electronic approaches to communicating with them.

This implementation was not without difficulties. Some of these were anticipated given the major changes to UCAS' approaches to electronic data transfer with institutions, and the fact that external fixed deadlines forced on us the need to overlap configuration, testing and training activities in ways which we recognised in advance were likely to create difficulties and enforce the need for shortcuts.

In view of the experience of the first implementation the Project Board reviewed the schedule for the remainder of the project in November 2007 and decided to re-phase the implementation of student administration in the interest of delivering on-line PG admissions in 2008. The remainder of this paper outlines the experience of the first implementation, lessons learned and actions taken as a result and the revised schedule.

¹ Further information on the EUCLID Project can be found at www.euclid.ed.ac.uk

4. UCAS/GTTR Admissions

Following go-live on the UCAS/GTTR functionality a change control process has been put in place to manage bug-fixes and enhancements to the software, with attention focussing on issues constraining the Colleges in making offers quickly. Considerable progress had been made with critical and high priority bugs resolved. Colleagues in the Colleges have also worked hard to use the software as effectively as possible to make offers for next admission cycle.

System performance has been an issue for the admissions process and the EUCLID team and Colleges have executed workarounds and other solutions to ensure that the University does not fall behind on last year's figures for making offers. The software supplier (Tribal) has also set up a process to review system performance and issues related to the underlying software and web-enablement.

Overall the Colleges have made excellent progress in getting offers out and the position continues to improve, in a context where we have received 6192 more applications in January 2008 than in January 2007. The Colleges are confident that they will finish processing within the same timeframe as in previous years.

The EUCLID team is now engaging with College Office staff on how best to utilise the new business processes built into the software e.g. electronic rather than paper transfer of data from colleges to allow schools to invite applicants to visit the University. Work is well underway to ensure delivery of the second part of UG admissions - new Clearing and Confirmation Functionality - in May and July 2008.

5. Key Lessons and impact on project planning

The Project Board and Project Team are very conscious of the impact of the first go-live on end-users and valuable lessons have been learned, which have been considered at recent meetings of the Project Board. The EUCLID Board and Team are determined to ensure that this learning is applied to the future phases of the project. A cautious and phased approach to future software releases will be adopted to avoid risks to business continuation.

Initial planning for the project took place on the basis of knowledge available at the start and in the absence of experience here, or elsewhere in the community of Universities using the software, of an implementation and change project of this kind. The plan represented best endeavour in that context and the Project team now has real experience upon which to base future plans.

Another key learning point was that despite senior management commitment to the vision for the project, the team encountered an unexpected degree of general reluctance (and in some areas resistance) to working differently. The expectation amongst users was that the software would deliver change and benefits rather than benefit resulting from changes to business practice, supported by the software. This meant that the team was unable to shut down discussion with stakeholders and had to spend considerable time justifying decisions/facilities provided.

A further complicating factor was that implementing web-based processes onto a client-server system proved more time-consuming than expected. Creating a web screen from a client-server screen is a relatively simple process – but building the workflow and in-tray messaging is complex. This was difficult to foresee as the extent to which the web-based processes are being used was a first for both the University and for Tribal. This knowledge is informing forward planning and scope definition for future releases.

These concerns were borne out by the assessment of the external Reviewers (Valuta) in September 2007. The review team expressed concern at the level of risk in the project caused by the compressed timetable for the externally driven October go-live, which created the risk of overlap between process and software design, configuration, testing and training. They regarded the formal separation of these areas as essential. While these concerns were largely about project timing decisions being driven by external deadlines, the risk highlighted was that such an approach to project management would be particularly dangerous if carried forward to future phases.

In view of all of this, the Project Board agreed in November that attempting to progress with the planned implementation schedule would result in the implementation of substantially less than desirable PG functionality and would create risks to ongoing student administration. It was decided to focus effort this academic year on the University's highest priority area for the project, i.e. aiming to deliver online PG Admissions from EUCLID, in support of Strategic Plan priorities. Web enabled admissions processes will represent a significant improvement to current business practices and will impact positively on the student experience.

6. Future deliverables

This decision enables the project team to focus on implementing change and enabling the University to develop more student-centric processes and faster, standardised ways of working in student administration. This will ensure that PG Admissions is developed into EUCLID properly (fully tested and with appropriate training) and delivered to users successfully. There are (excluding academics) over 270 support staff involved in PG administration who need to be trained and the team will be seeking co-operation and support from Implementation Co-ordinators and Subject Matter Experts to engage in a variety of training methods.

This impact of this decision is re-phasing the implementation of the remainder of the project and delaying Student Administration, Assessment and PCAM/CCAM until academic year 2009-10. This in turn means that DACS and WISARD will continue in use for student administration for one further session, 2008-09. This re-phasing will allow time for proper evaluation of major business process improvements in student administration, in line with the Project's Vision. Other advantages are that the implementation of student administration will fit better with the review of academic and pastoral care for students and additional time will be available to address complex assessment requirements.

The EUCLID components for programme and course creation, approval and maintenance, (PCAM / CCAM / Publishing of online programme information) are now expected to go live towards the end of 2008. This means that the existing CCAM system will be used for the current academic year, with existing procedures used for programme approval. The project team is working with the Web Development Project on implications for future updating of online programme and course information.

Work on DPTs is continuing in preparation for migration into the system. Schools have been asked to continue working on their DPTs, as anything that can be done by Boards of Studies this year to tidy DPTs will reduce workload next year. The DRPS will need to continue for a further year in its existing format, with courses from CCAM being delivered into the DRPS and DPTs updated through existing processes..

The decision to re-phase the remainder of the Project provides more time to consider assessment and the policy issues that will have to be discussed across the University before making decisions on the implementation of new assessment processes. As the capabilities of the software are now clearer, there may need to be a significant amount of work done to find the optimum solution for our assessment requirements. The EUCLID Assessment Working Group has been set up to prepare our assessment practices for

implementation within EUCLID. The Group, convened by Professor Nigel Seaton, held its first meeting on Monday, 11 February and will meet a further three times before presenting proposals to the APC in April 2008.

7. Conclusion

EUCLID is a business-led programme, the size, scale and complexity of which has never before been attempted in the University. We are increasing our knowledge at each stage and adapting our approach as lessons are learned.

This approach outlined above is in keeping with the vision for the project and the drivers for change. It provides the opportunity to reaffirm that this is a business change project, and not just software implementation. Priority is being given to the strategic priority area of PG Admissions and PG functionality will be delivered much sooner than would have been possible if the original plan was pursued.

The project has recognised the need to re-embrace the Project's Vision, which requires renewed emphasis in the team and across the whole University on standardised customer-oriented business processes rather than complex software delivering simply more efficient versions of current business processes.

We are, with the appointment of our strategic change manager last month, now in the position to begin to support colleagues more in using the software and in reviewing the different business processes and practices in the three Colleges.

Veena O'Halloran
Project Director