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Desktop survey

If you've logged into Banner lately you may have noticed a pop-up asking you to provide information about your operating system and web browser to UNESIS Technical Project Manager Rob Hale. (Judging by the complaints we received you could hardly have missed it.) Irritating though this reminder may have been, it is very important that we get this information because Callista may not work with everybody's current setup. Some users may have to upgrade their OS or web browser in order to run the Callista application. So we need to know what you are using so that we can tell you what upgrades you will need to access Callista in September.

Upgrading will also be a useful exercise for FinanceOne users. Like Callista, FinanceOne will only run on an up-to-date system. Users with outdated operating systems and browsers need to upgrade to take advantage of its full range of functionality.

Before putting the pop-up on Banner we sent an email to the Banner users' email list but only a quarter of subscribers responded. More people have gotten back to us in the past week or two, but those

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2 MONTHS TO BLASTOFF



Callista lights the way through HESA



As if we didn't have enough on our plate implementing a brand new student system, we also have to cope with major changes to the student information we collect and report, necessitated by the Higher Education Support Act (2003). So wide-reaching are these changes that Callista Software Systems has initiated a whole new project to deal with them. "Project Lighthouse" will help Callista-equipped universities such as our own steer their way through the new legislation.

Rather than maintain their usual six-month release cycle, Callista are releasing new functionality almost as fast as they can code it. Starting with release 7.0.0 at the end of June, they will release four significant upgrades to their student management software within six months. These upgrades will allow for the recording of information such as the Commonwealth Higher Education Student Support Number (CHESSN) and "student status" codes, which will replace HECS codes.

By December UNE will begin invoicing students based on the new fee structure, which was approved 2 April 2004. UNE will also begin registering students for Commonwealth assistance using the new Commonwealth Assistance Forms (CAF), which will replace the HECS forms in use today.

To get a picture of how these changes will impact Callista, consider the DEST ruling that the number previously known as the Equivalent Full-Time Student Unit (EFTSU) will now be known as the Equivalent Full-Time Student Load (EFTSL). There are approximately 350 references to 'EFTSU' in Callista forms and reports. Every single one will have to be changed to 'EFTSL' to bring Callista into line with DEST requirements. That's 350 individual changes made necessary by the alteration of just one letter. This is only one example of one tiny change to a single data element. We will make *thousands* of such changes. As you can see, we have our work cut out for us.

But while bringing UNESIS up to speed with the new legislation will be a big job, we're in a much better position than universities with homegrown student systems, or American systems such as Banner. Geelong-based Callista understands the unique and changing needs of Australian universities. They're going to hold our hands as we go about the tricky business of

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Rob's survey

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who still haven't need to do so as soon as possible. Non-compliant systems must be identified now so that we don't end up with people unable to do their job when the new student system goes live.

If you will use the student system and you still haven't responded please contact Rob at rhale@pobox.une.edu.au or on extension 2814. ☉

Customer Relationship Management System

UNE is considering purchasing a Customer Relationship Management (CRM) system to track student enquiries and improve customer service. The new system will be used to log phone, fax, web and email enquiries, and will provide staff in the Student Centre with a comprehensive picture of all the communications that have taken place between the University and individual students. Staff will use the system to identify trends in student enquiries and information from the CRM will be shared with the Callista student system.

Project Officer Kim Guthrie and Student Account Manager Stephen Wright (see below) are looking into possible CRM software packages, including one from Callista Software Services.

In the future the system may be expanded to cater for Alumni, Marketing and Public Affairs and others, Ms. Guthrie said. ☉

SIS-terly movements

Student Accounts Manager **Stephen Wright** began with UNE last month. He moved to Armidale from Toowoomba, where he worked for NextEd, a substantially-owned subsidiary of the University of Southern Queensland. During his time at NextEd Stephen managed their support centre and later took charge of account services.

As Director of Account Services at NextEd, Stephen oversaw several system implementations, including introducing a CRM at USQ. He's putting that experience to good use at UNE, helping Kim Guthrie to choose a CRM to keep track of our student enquiries. Mostly, though, he will concentrate on student accounts, where he says he's looking

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Callista lights the way through HESA

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becoming HESA compliant. We also have the support of 12 other Australian universities that are going through the same process with their own Callista-based student systems.

Implementing the HESA changes will put an enormous strain on UNE resources, says UNESIS Business Manager Trevor Edgar.

"It means we will be under a lot of extra pressure around go-live. But on the plus side we do have resources in place to implement the changes. It would be even harder if we had already gone live and were in 'support mode'."

Another impact of the changes on users will be in their training. Users will complete initial Callista training shortly before the system goes live in September. Later they'll need to attend HEIMS workshops and receive update training to learn how use the functionality introduced in the post-launch releases. ☉

User Acceptance Testing

"It's just like a more advanced version of Banner," says Jennie Snell, without taking her eyes from the computer screen. Jennie is tapping away at a keyboard in the testing corner at the back of the UNESIS office. She glances at the testing 'script' sitting at her elbow, which describes procedures for enrolling new students using the Callista student system. She stops typing to confer with fellow-tester Janet Kolloosche. Testing Coordinator John Geerligs supervises.

Jennie, Janet and John are engaged in User Acceptance Testing (UAT). It is their job, along with Carolyn Kirk, Sally Dunbar and Greg Chappell, to get UNE's business users to accept the new student system. Not only the software, but also the procedures, documentation and training that supports it. If they give the new SIS the nod, then the business users can be confident that they will



Jennie Snell and Janet Kolloosche

be able to operate successfully with the new system after we go live in September.

"Actually, saying that we're 'testing' the system is a bit of a misnomer," says John. "A better word might be 'proving'. Basically, we're ensuring that all the gaps [between the UNESIS system and UNE business processes] that were identified in the original analysis have been addressed by procedures, reports or enhancements to the software. We're proving that the configuration, procedures and data migration have all been set up properly. We need to know the system is going to be up to the job in September, in terms of performance, reliability and capacity."

He adds with a grin, "We're going to give this system a real pounding."

Janet, who has been seconded from the new Student Centre

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User Acceptance Testing

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along with Jennie, says that while in mastering the new system she was on “a bit of a learning curve” she is confident that “anyone who currently uses Banner will have no difficulty getting used to the new system. It’s quite similar to what we have now, but with a bit more functionality, some different ways of doing things.”

Jennie backs her up.

“The more familiar you get with it, the easier you find it. The only people I could see finding it harder are those with no experience in data entry, and they’re going to have a lot to learn no matter what system we’re using.” ☉

What you’ve all been waiting for: training

“There is nothing training cannot do. Nothing is above its reach. It can turn bad morals to good; it can destroy bad principles and recreate good ones; it can lift men to angelship.” (Mark Twain)

With only two months to go until UNESIS go-live the big question on users’ lips is “how and when am I going to learn to use the new system?” Rest assured that the UNESIS team have been planning and preparing for user training for some time now. While we’re not sure that that the training will do everything that Mark Twain promises, we are confident that it will give you the knowledge and skills that you need to use UNESIS in your job.

Why are we confident about the training? For one thing it will be competency-based. This means that the training will match your specific needs. If you are a “view-only” or “inquiry” user who only uses the system to view student records or run reports, then you will be able to learn about basic system navigation and functionality in your own time and place via a web-based training module. If you are a more frequent “update” user who enters data into the system then you will receive more intensive face-to-face training and documentation that matches your job role.

Another feature of the training is that it will be delivered “just in time”. In other words the training will take place as close as possible to go-live, giving you the chance to apply your new knowledge while it is still fresh in your mind.

We are also going to make sure that you are not left on your own after we go live. We are building an online help facility that will guide you through the system and associated UNE procedures. If that doesn’t answer your questions you can always pick the brains of your colleagues who have been called upon to help out with the system implementation, for example through the testing process. As with Banner there will also be a dedicated team of IT and Student Administration staff on hand to solve any problems that you might encounter.

You will receive more detailed information about UNESIS user training soon. If you have any questions in the meantime please email unesis@une.edu.au, or call Anthony Rologas (UNESIS Change & Communications Manager) on extension 3606. ☉

Meet your SIS-ers

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forward to improving customer service processes and procedures.

Stephen says he expects his biggest challenges will be managing the HEIMS project, as well as student fees, sponsored student accounts and student accounts at our overseas partners, such as Wuxi.

“The University has invested heavily in people, but they are only supported by a thin layer of technology,” said Stephen. “I see my job as helping to get a better balance between people and technology.”

Stephen says he and his partner like Armidale and haven’t been scared off by the frosty mornings we’ve been having lately.

“Toowoomba weather isn’t all that different to Armidale. Now I just wear three layers of clothes to work instead of two.”



Stephen Wright



Gary Robertson

Analyst/Programmer **Gary Robertson** has left the UNESIS team to pursue his interests in forensic computing. Gary will take up a position with IT investigations company Forensic Data in Sydney. His supervisor Linda Wells said: “Gary has been a highly valued member of the UNESIS data migration team. His sense of humor will be missed almost as much as his excellent programming skills. We all wish him the best in his new position in sunny and warm Sydney.” ☉

Courses and Units Repository

Back in January *UNESIS Update* brought you news that UNE was to collaborate with Queensland University of Technology to investigate software to manage the units approval process and hold course and unit data. Consultant Graeme Burton was charged with reviewing the course and units

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Meet your SIS-ers

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development and approval processes at the two universities. He recently completed that review, and the project has now entered the planning phase, where a steering committee will be established to oversee the project, which has been christened the Course and Units Management and Publication Project (CUMaPP). Graeme has begun holding workshops with academics and business managers to identify the Project's scope and goals.

Several options are under consideration for acquiring the software:

- Acquisition of an off-the-shelf product that provides substantially what is required at UNE and is flexible enough to be able to change as the University's requirements change.
- Acquisition of a system developed by another Australian university that provides substantially what is required at UNE.
- Acquisition of a system developed at another Australian university that provides some of what is required at UNE and then collaboration to further develop the system.
- Development of a system by UNE resources alone.

Mr. Burton says that he expects the university to make a decision soon on which option to pursue. ☺

Communications Survey

A survey of UNESIS communications will arrive in your mailbox shortly. Please take the opportunity to tell us how you feel about the messages you're getting about your new student system. We'd love to hear your ideas for improving on what we're doing.

Talking shop with Edith Cowan



Tony Lazzara

When we go live with Callista in September we will be heading down a path well trodden by other Australian universities before us. Edith Cowan University, Charles Darwin University, the University of Canberra and others all recently launched their own Callista-based student management systems. *UNESIS Update* spoke to Tony Lazzara, Assistant Director of Student Systems and Information at Edith Cowan (and Project Manager of the ECU Callista project), to get the inside story on launching Callista at ECU.

Update: You went live in June. How's it going?

Tony: Things have gone pretty smoothly so far. There have been a few teething problems, as you'd expect, but for the most part it's going well.

Update: What sort of 'teething problems'?

Tony: Callista Connect's online enrolment functionality has given us some minor headaches. We've had an online enrolment system for many years now. In fact we were one of the first universities in Australia to offer it. Connect does things a bit differently to our old EC UWES [Edith Cowan University Web Enrolment System] so that's taken some getting used to.

Update: It's probably a good thing we're not trying to go live with online enrolments in September, then. So what sort of training did you offer your users?

Tony: We ran a series of familiarisation sessions early on for key student administration people. As we got closer to go-live we brought in a formal trainer to do regular familiarisation sessions and we opened up a "play" database for general staff to go in and have a look. It was compulsory to attend either one of those familiarisation sessions or enquiry user training before you received specialist training in your area.

Update: Did you offer mostly online training or face-to-face?

Tony: A mixture of both. At the familiarisation sessions we issued attendees with a folder and the basic enquiry module, and then they could add modules to that from subsequent sessions or what they downloaded off our website.

Update: Any advice for us as we approach go-live?

Tony: Communicate! Good communications are absolutely essential. It doesn't matter how much you think you've communicated, you can always do more. We had a newsletter and a website and we ran roadshows that went out to every campus. Aside from that, testing is crucial. We actually had IBM come in and do an independent audit before go-live, which was very useful, especially for establishing go-live criteria. We all live in the aftermath of RMIT, so it's important to cover all your bases. ☺

Talk to us

There are a number of people participating in the UNESIS implementation project in one way or another. If you're particularly interested in helping implement your new SIS, but haven't yet been tapped on the shoulder, let us know you want to join in. Send an email to unesis@une.edu.au, use the 'Contact Us' link on www.une.edu.au/unesis/ or call **extension 3328**.