Kuali Student Update
Not Just the Right Information
Changing Education Models

School of One

moodle

skype™ Sakai
Affiliation Types

Adopters
• Pay NO licensing fees
• Can use Commercial Affiliates

Members
• Pay annual membership dues
• Vote for Board members
• Enjoy reduced conference fees

Partners
• Have seat at the governance table
• Provide technical and functional resources
• Retain deep knowledge of Kuali projects
Criteria for Selecting Release 1

Kuali Student Functional Priority Rating
December 2006 Workshop

- Risk
- Value to Community (Founding Institutions)
- Customer Contact
- Degree Audit
- Scheduling
- Awards
- Enrolment
- Student Financials
- Concierge

Curriculum Development

Low

High

Low

High

Value to Community (Founding Institutions)
Release Sequence Priority Criteria

- Logical build sequence
  - Highest priority
- Development Risk
  - Deliver higher risk as R2 - tackle and resolve performance issues early
  - Deliver lower risk as R2 - test a slightly higher volume module
- Implementation ease
  - Minimize bridging for immediate implementation
- Institutional benefit or current need
  - High benefit to students should be considered early
- Marketing Benefit
  - Deliver modules to increase early adoption
  - Attract partners as early as possible for tier 3 development
- Vendor Options currently exist
  - Board recommends delaying Scheduling Algorithm & Financial Aid
Overall KS Release Plan

Key – Logical Groupings
- R1 – LUM, PI & Infrastructure
- R2a & b – LUI person offering, Program Audit, Learning Plan & Results
- R2c - Enrollment – registration, LUI person relationship
- R3 - SFS
- R4 - Admissions & FA
- R5 – Scheduling

Release 1

- Infrastructure Components e.g. search, communications, configuration, etc.
- Person Identity
- LUM
- LUI Offering
- Enrollment (Registration)
- Admissions
- Enrollment Learning Unit Results & Learning Plan
- Program Audit and Evaluation
- Student Financials
- Financial Aid

Exchange data
Provides criteria for
Uses
Products for assessment
Provides criteria & uses
Methodology

**Sources of Information**

- Registration/Enrollment Unit, Office of the Registrar
- Classroom Management Unit (Scheduling Office), Office of the Registrar
- Information Services and Technology Division
- Selected Department Schedulers

**Description**

This page describes UC Berkeley's business requirements for the Course Offerings Lifecycle. It is primarily concerned with the processes involved in the initial setup of course offerings for a forthcoming term, and the management/maintenance of those course offerings over the term's duration.

**Overview**

[Flowchart showing the course offering lifecycle]

**Process Diagram**

[Complex flowchart detailing the process steps]
# Methodology

## BRT Course Offering - Berkeley Data - CRSEOFFR Table

It is not assumed that KS will adopt the same data elements (or a similar data table structure) as what is currently being used. The decisions surrounding which of the current data elements will be needed for KS, as well as how the data will be stored/managed, is out of scope for the purposes of this document.

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<th>INCLUDED IN CARRY-FORWARD?</th>
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Overall KS Release Plan

**FOUNDER & PARTNER SCOPE**
The core functionality that the Founders/Partners are committed to developing and implementing as first priority.

- Architecture
- Infrastructure
- Learning Unit Management & Person Identity
- Enrollment (including Learning Plan)
- Program Audit & Evaluation

**CONCIERGE**

- Student Financials
- Admissions & Financial Aid
- Scheduling

**COMPLEMENTARY MODULES**
Future partners are encouraged to take on these functions once the service contracts have been designed and published.

**CONNECTORS TO OTHER SYSTEMS**
To be developed along with the appropriate KS module.

- Alumni, Athletics, Elections, Event Management,
- Family Financial Planning, Housing, Recruitment, Student Life
- Facilities Management, Financial System, Learning Management System,
- Library System, Parking System, Student Portfolio, Degree Audit
Release 1 - Learning Unit Management

- Manage catalog of Learning Experiences
  - e.g. Courses, Programs, Credentials
  - Learning Objectives
  - Support rules for transfer credit, program audit
  - Support flexible time periods
- Manage creation, approval new LUs
  - Configure new Learning Unit Types
  - Workflow for course and program creation and modification
- Manage evaluation, review of existing LUs
  - Curriculum review process
- Publish online catalog
Release 1 - Person Identity

• Person Identity
  – Manage person information
  – Support authorization and authentication
  – Manage groups and organizations
  – Manage contact information
  – Support workflow between individuals and committees
Release 2 - Enrollment & Program Audit

- Enrollment – back end processes (Release 2a & 2b)
  - Create Learning Unit Instances (i.e. sections, program offerings)
  - Maintain historical academic records
  - Collect learning results (grades collection)
  - Program Audit and Evaluation
  - Transcript
  - Learning Plan
- Enrollment – Registration (Release 2c)
  - Registration and tying all Enrollment components together
- Infrastructure enhancements (R2a, b & c)
  - Expand infrastructure & Person Identity components from R1
Release 3

• Student Financials
  – Product pricing
  – Assessment of additional fees
  – Determine invoice and payment plans
  – Payment processing

• Infrastructure enhancements
  – Expand infrastructure & Person Identity components as appropriate
  – Expand Concierge & reporting capabilities
Release 4 and 5

- **Admissions**
  - Capture application info
  - Manage evidence
  - Automate process workflow
  - Evaluate learner’s qualifications

- **Financial Aid**
  - Manage awards, financial aid resources
  - Maintain student characteristics and needs
  - Assign awards to students

- **Scheduling (R5)**
  - Manage LU “offerings”
  - Schedule and optimize resources
  - Manage calendars
Kuali and Standards

- We are committed to following them
  - Open Source
  - Data
  - Industry
  - Government
  - Foundations
- We may have to drive them
  - New paradigms of management
  - New structures and rules
- We hope to leverage or integrate with them
  - Existing standards orgs
  - Vendors
  - School nurtured