

September 20, 2013 Curriculum Central Campus Administrators Transition to Quali 2

Present: Brian Richards, Kevin Morimatsu, Kahele Dukelow, Thanh Giang, Susan Pope, Ryan Bungard, Myrtle Yamada, Pete Gross, Tammie Napoleon, Kathleen Lee, Terri Ota, Mitch Okuma, April Scazzola
Unable to attend: Jon Awaya, Russell Uyeno

Materials have been shared on Google Drive with all participants:

Folder 1: Sept 20 Handouts (documents were printed and handed out for use in the meeting)

Folder 2: Sept 20 View on Drive (documents can be viewed as needed during the discussion)

Today's Objectives:

1. Identify core items in the course proposal
2. Identify Quali Course Management functions: what Quali CM can do and what additional functions are needed, either added to Quali or otherwise available/implemented
3. Next steps

Sept. 25: Joanne and April meeting with CCCAO group

Sept 25: April meeting with Banner group

October 18: Joanne and April meeting ACCFSC

October 3-4 Michelle Appel from University of Maryland coming to meet us and help with work on RFP

Working principles:

- What we decide today is not final, but we want to end the session with a draft list of proposal items and functions that can be shared with others.
- Focus on the type of questions that must be included in Quali, not the exact wording—we can work out those details of wording next semester, after the RFP goes out.
- The “System System Principle. There needs to be cross-system consensus on what is “core.”
- The Vanilla Principle: Minimize customizing that requires sophisticated (costly) programming.

Core Items in Course Proposal Form

1. What are the core items?

Raw data: Questions used on the campuses: In folder Sept 20 View on Drive: "KS-course-items vs campus items 9-18-13"

Kauli categories in left column
Banner items identified (not sure if all are marked)
Institutions are across top

Handout: Most frequent items and campus wording=basis for identifying "core items" for Kuali inclusion. (In Drive folder Sept 20 Handouts, "Campus item wording 9-19-13.")

Leftmost column: Question categories used by all or almost all campuses; last three items (course content, level, place in sequence from KAU, similar items by some campuses)

Right columns: wording on each of the campuses for these categories

Core items must include all necessary Banner items. In next version, Banner state of each item will be indicated.

After discussion, we identified 28 questions/question categories that, at this point, would qualify as "core items."

Pending question:

KAP: Teaching Equivalencies? -> goes into Banner, is a Union issue
Consensus: Because it can be calculated based on contact hours, and faculty proposers might not enter the correct figure, so it may not need to be an item.

Links to parallel development of Program Management component:

Program within which the course will function (e.g., as a requirement): Acc. to Michelle and Mike, rudimentary use of the Program function will allow referencing to specific programs and program learning outcomes.

GE approval of the course: GE can be entered as a program in the Program function and so GE outcomes/requirements and categories can be accessed for course proposals.

Program Learning Outcomes questions pages 6, 7, 8. Can these be filtered by campus and department, so we don't have to plow through all the PLOs in the UHsystem?

2. How can we accommodate non-core items of concern to only to specific groups:

- These can be arranged in sections following the core item sections and lumped together under the label (for example) “Community Colleges Only.”
- Some options might be added to existing categories: e.g., MAN needs the HONORS designation to be available. Need to determine what implications such designation have, e.g., in terms of approver sequence.
- The Locations function may allow Quali to display campus-specific items. Need to determine if the Locations function can dynamically set other questions. [Functionality question]
- Quali allows rich variety of attachments; some campuses might require the use of campus templates to be completed and attached to proposals. Might consider handling certain assessment information as attachments.
- Some campuses want linking of learning outcomes the way this is done in Curriculum Central. We need a clear description of what this linking is and how it might be managed both in Quali and by other means. [Functionality question]
- Articulation of course X with courses across the system: Can this be developed in Quali? [Functionality question?]
- Items regarding Course Content/Course Level/Place in Sequence. These show up for some campuses, either directly (LEE, items 12, 25, 38) or in indirect ways (e.g., UHMC course content and timeline, HIL syllabus), but LEE says it is important for accreditation. All CCs have same accrediting commission, and that commission works closely with the senior college accrediting commission.

2. Next Step for Core Items. Share draft.

Based on the day’s discussion, Thanh, Susan, and April will work on a draft list of core items, linking CurrCtrl terms/categories, Quali terms/categories, and Banner markers. This will be circulated to the group beginning Monday, using Drive; comments must be entered by Tuesday noon (Drive/Insert/Comment will enable you to enter your comments with your name and time/date automatically indicated). Draft will be shared with CCAO and Banner group by April on 9/25..

Functions

Sept 10 Handouts: “What Can Kualo Do... “ with responses from Mike Colson [MC] of Maryland and Michelle Appel [MA] of Kualo/Maryland

1. Discussion

Thanh led this conversation, making sure we understood what Mike and Michelle wrote, and what was cited from Kualo documentation.

- Customization versus Configuration (Fancy vs. Vanilla)

Customization requires (sophisticated) and costly programming and may make it difficult for us to upgrade to next versions of Kualo, which will not contain our customizations. (We are trying to avoid customization)

Configuration means formatting, adding sections, categories, questions; hiding sections/questions we don't presently want rather than deleting them. Hide Financials section; set course number constraint to meet UH system needs. With training these can be done in-house.

- Pending issues:
Interface with other UH systems, in particular Banner

Data cleaning before pushing into Kualo:

Course articulation among 10 campuses
There might be a way to do this: possibly extension of Course Dependency Analysis. Kualo can accommodate differences in title /content for different campuses for same course number

2. Types of Functions:

“What Can Kualo Do...” : pages 1-2, TOC and references; pages 3-10, Mike Colson and Michelle Appel respond in general terms to our categories; pages 11-24, specific function questions with answers from Kualo sources and Mike.

Details are in the document. Here are highlights of Thanh's comments and participants' questions.

1. Interfacing with other UH Systems: Banner in particular. This is the highest priority for everyone—two-way transfer of course and program information between Banner and Kualo.
 - Thanh reports that he has seen data migration tools on forums; these should be explored

2. Kuali System Core Items: Questions were raised about loss of information if questions are changed/deleted. This can be addressed within Kuali.
3. Creating a Proposal: Kuali appears to have almost all functions we'd like that are related to creating proposals, plus some nifty ones, like the Course Dependency Analysis that displays prereq/coreq/crosslisted courses and courses that use this course as prereq, etc. Should/can this be configured to show such courses across all campuses? Kuali ensures that proposers can only create courses within their own departments.

Kuali's Coauthor function allows some flexibility during the creation and approval processes.

4. Program Learning Outcomes: Kuali is designed for single-campus use. We need to determine if it can be configured to distinguish between different campuses' sets of PLOs, ILOs, so that only appropriate LO options will be displayed.

Kuali does not provide means of linking PLOs to assessment processes. We need to determine whether this should be built into Kuali or whether other means can be used for those campuses that require it.

5. GE Designations: Can be handled at one level in course proposal GE items. GE requirements can be built into a "GE Program" in the Program module and accessed thru Course module. UMD keeps GE designation separate. Note: Most UH campuses, GE certification and course proposing/approving are overseen by separate committees.
6. Revision During Approval Process: We can set Kuali to allow only certain participants (e.g. proposer) to revise; to allow proposals to be sent back to proposer and (say) approver who requested revision; this looks like functions that involve configuration rather than customization.
7. Approval Sequence/Process: Multi-campus system will need to distinguish between campuses, and for each campus, different sequences for different units. Kuali uses administrative nodes, so replacing personnel is straightforward.

CurrCtrl allows for comments on and revision to individual proposal items; Kuali allows for approvers to make only overall comments on revisions (comment screen shows these), and all proposal items can be revised by those authorized to make revisions (proposer and others, if system allows). Approvers also indicate why they approve/do not approve the proposal; decision screen shows this.

Fast-tracking: For certain classes of proposal (e.g., Pilot courses, Honors courses), special workflows (approval sequences) can be set. Otherwise, central would need to fast-track on request.

8. **Viewing and Reports:** **Viewing:** In addition to summary views of proposals/courses, Kuali offers course histories, view comments, **Reporting:** Kuali itself has very limited reporting built in through RICE, but institutions/campuses can develop their own reports with other software; Kuali data is ODBC-accessible, like ODS for Banner. CurrCtrl offers a rich array of reports and campuses want similar reports for Kuali.

Kuali supports side-by-side viewing of current course with proposed course with modifications highlighted; course history of approval processes; and other basic views of information for individual courses (which can be selected from course inventories). Kuali allows for approvers to state/explain decisions.

9. **Internal Communication:** Kuali sends emails notifications to involved users at key points. Other kinds of emails, postings would need to be added to Kuali or managed externally, e.g. by campus protocols for communication.
10. **Campus (vs. ITS) Management of Processes:** The UH system and campuses need to decide exactly what actions individual campus administrators can take and what must be the responsibility of central administration/ITS. In CurrCtrl, campus admins can update persons in the approval sequences and perform “raw data” edits of proposals; this is one of the actions that might be assigned to central instead.

The UMD Testudo demo shows that an approver can be allowed to make changes to a proposal during the approval process--the demo involves a dept chair making changes the proposer forgot to put in. So “raw edits” could be done at the campus level if we decide we want such latitude.

Thanh’s recommendations

- Include functions in RFP and proposers will advise what it would cost to customize
- Campuses should consider not adding new items to CurrCtrl. We need to work out what will get migrated to Kuali and what will not.

3. Next Steps for Functionality

- Get more information. Other institutions are developing Kuali CM—e.g., NorthWest University of South Africa, Boston College. The IUG group on the Kuali website enables us to contact other institutions to see if they support multi campuses
- See Maryland demo of an approver not only reviewing but also making edits as requested by proposer: <http://www.webspace.umd.edu/KSProject/upload/ReviewaCourseModification.html>

- Michelle's visit in October gives us the opportunity for in-depth exploration of Kualu capabilities.
- Based on the 9/20 discussion and materials, Thanh will develop a draft list of functions that must be available to users upon implementation. An abbreviated form of this list will be presented to CCAO and Banner group.

Notes by Mitch and April 9/20/13
 Edited by April 9/22/13

Documents on Google Drive

Folder: Sept 20 Handouts [also distributed in hardcopy at meeting]

Campus items wording 9-19-13 [key document for core items discussion]
 Can Kualu Do This with Answers [key document for functions discussion]
 English 101 in Kualu vs. Testudo CM [UMD]
 Important Kualu RLs for Campus Administrators
 Sept 20 Kualu Transition 2 [powerpoint for meeting]

Folder: Sept 20 View on Drive [viewed during meeting]

1. Google Drive presentation [training powerpoint for pre-session]
2. KS course items vs. campis items 9-18-13
3. [Folder] All campus proposal forms
4. [Folder] Kualu course proposal screenshots
5. Frequent campus items summary and wording
6. KS comments and decisions screens [screenshot]
7. KAP Kualu program requirements for assessment [for next meeting]
8. Notes from Kualu program proposal demo [for next meeting]