

University Streamlines Yearly Planning with Electronic Forms

Southern Cross University

industry:

Education

country:

Australia

business challenge:

Align complex planning processes with the university's budget and create a single point of entry for planning data

solution:

A web portal based on Microsoft Office SharePoint Server 2007 with electronic forms developed using InfoPath Forms Server. A new authentication, and file and print services system

services:

- Microsoft SharePoint Portal Server 2007 Planning, Deployment & Integration Services
- Custom Forms Development Authentication, File and Print Services based on Microsoft Active Directory

results:

- Created proper reports to eliminate time spent pasting information from separate documents
- Provided the ability to compare and track each school's year-on-year progress towards its strategic objectives
- Ensured the planning process is the same each year with systematic information gathering
- Reduced the risk of working without dated documents, which gives greater confidence the right material is being used

Executive Summary

Southern Cross University struggled with a complex and time-consuming planning process that made it difficult to allocate yearly budgets against the university's priorities.

SCU engaged Dimension Data to assist with the **deployment of a web portal based on Microsoft Office SharePoint Server 2007 (SharePoint)**. Specially designed **electronic forms guide** heads of school and managers of support units through the planning process.

They also enable SCU's Office of Planning, Quality and Review (PQR) to create precise, detailed reports to make better decisions about where budgets should be allocated.

Client Overview

Southern Cross University is a mid-sized university on the northern coast of New South Wales with 16,000 students. Its two faculties, Arts and Sciences and Business and Law, comprise nine individual schools and colleges in Lismore, Coffs Harbour and Tweed Heads. The university has a reputation for its research skills and attracts many international students.

Business Challenge

Every year, the university's heads of school are asked to complete a three-year plan, which sets out specific strategies aligned with the objectives of the SCU's overall strategic plan.

From these plans, each school sets a series of priorities for consideration in the budgeting process.

The planning process is complicated and requires coordinated input from many parties within each school, and sign-off at various levels. According to Julie Arthur, Director, PQR – the unit tasked with overseeing this process – these annual plans were not easy to create.

"We used to collate data that was sent in from heads of school by email and create massive documents in Microsoft Word," said Arthur. "Since individual plans were produced in various formats, it was difficult to cross-check them against each other or amalgamate the data. As a result, we could not provide information to support areas to assist in their annual planning, which follows planning done by the individual schools."

PQR could not provide the university with sufficient data to align the planning processes with performance tracking or budgeting.

"The data wasn't sufficiently detailed or organised to tell us whether schools were actually progressing against their KPIs," said Arthur. "There was no formal link between planning and budgeting across the university because information was sitting in silos within each school."

The university needed a solution that would closer align planning process with its budget and create a single point of entry for the planning data. The solution also had to be easy to use as some of the university's academics had software skills related to their academic careers but had less experience working with management software.

“Dimension Data engineers were very **approachable, helpful and flexible** throughout these implementations. **They had a real ‘can-do attitude.’**”

Julie Arthur, Director, Planning, Quality and Review, Southern Cross University

Solution Delivered

In March 2009, the university engaged Dimension Data to assist with the rollout of a web portal based on SharePoint, and to design electronic forms using Microsoft InfoPath.

Under the new system, heads of school fill in their annual plan using these electronic forms. The data they enter is consolidated into SharePoint. A Microsoft Office Excel reporting tool extracts the data from SharePoint and then filters it to create several standard reports, which are used to generate the annual budget.

In a separate project, Dimension Data also deployed Microsoft Active Directory to replace an existing Novell NDS-based directory file and print services infrastructure. Microsoft Windows 2008 Active Directory is used to authenticate and control user access. This has simplified access because users only have to remember one password to access the entire system. It is also easier for technicians to maintain, since it is integrated with the rest of the Microsoft application suite.

These solutions have improved the entire planning process, making it easier for department heads to submit information and for the planning department to allocate university budgets.

How We Delivered

During the initial stages of the project, Dimension Data worked closely with SCU's planning department to design a form that would make it easy for heads to submit information for planning.

“The heads of each school can download the forms from the planning website, and fill them in as the first step in the planning round. We also designed pop-ups as aids to help them, as they can become very large and complex documents,” said **Dimension Data's National Development Manager, Shane Coetser.**

SCU's Julie Arthur worked with Dimension Data to replicate fields from an existing Microsoft Word form that heads of each school previously used to submit information.

“This ensured that we developed a form that was familiar to the user,” said Arthur. “We talked them through the changes that were being made, where they wanted drop-down menus and other aspects of the form.”

Dimension Data built the Microsoft Office Excel reporting tool from scratch using Microsoft Visual Studio tools for Microsoft Office and Microsoft Visual Studio 2008. These reports are a key part of the planning process. For example, if the university is planning on introducing a new course during the coming year, it will need to generate a report on how many computers and how many new rooms will be required to support the students.

“Dimension Data provided a quick solution to aggregate our data and this tool allows us to open and view Microsoft Excel documents in SharePoint,” said Arthur. “Typically, this is information about our objectives, each school's KPIs, and measurements and results. I can use this tool to filter and aggregate information by school to achieve multiple views.”

Dimension Data also provided support and advice during the set-up of the SharePoint portal, helping to iron out functional issues with the website, and providing documentation and training on how to use the system.

During the Microsoft Active Directory deployment, Dimension Data engineers designed and implemented a new file and print architecture for all campuses based on Microsoft Windows 2008 Server and provided integration between Apple MacOS authentication and Active Directory. Dimension Data also set up a lab to train SCU staff on how to use the system before the university deployed it into production.

“Dimension Data engineers were very approachable, helpful and flexible throughout these implementations,” said Arthur. “They had a real ‘can-do’ attitude at each stage of the process.”

Value Derived

With the InfoPath forms in place, PQR can collate proper reports to help with planning, rather than spend time cutting and pasting data from Microsoft Word documents.

“We have finally streamlined the planning cycle,” said Arthur. “We can compile a list of risks or strategies, or even a prioritised list of resource implications.”

In addition, PQR has access to each school’s KPI data, so it can compare and track year-on-year progress towards its strategic objectives.

“This has provided us with a single point of reference for all information coming out of the schools,” said Arthur. “And in the first year we used it, it worked very well.”

By using SharePoint as a repository for planning data, the university has reduced risks related to the integrity of planning data in two key areas.

Firstly, the university has data continuity because data gathering is systematic; PQR knows what data it has and does not have, and can make sure the data is organised in the same way each year.

“Because there is a high staff turnover at universities, continuity of planning is very important,” said Arthur.

“Alternatively, if someone goes on leave during the planning process, at least the documentation is there and it is relatively easy for someone else to come in and pick up where the person left off.”

Secondly, the risk of working with outdated documents has been reduced, which gives the school more confidence that it is using the right material during the planning process.

“Version control is one of the biggest benefits of SharePoint,” said Arthur.

“There is only one version at a time and because documents are checked-in and checked-out, I can see who has made changes and when.”

One of the university’s heads of school is using SharePoint to put all his departmental information onto a planning website. He uses the authorisation function, introduced with Microsoft Active Directory, to allow staff to access certain documents.

“By doing this, he has successfully created a centre for staff to work together on various documents within his school,” said Arthur. “We also plan to develop SharePoint to provide a range of information to heads of school.”