Project name: XCRI mini-project
Version: 1.1
Contact: Tom Grahame tom.grahame@gmsa.ac.uk 0161 921 8045
Date: 15/02/2008

JISC Project Plan – XCRI mini-projects

Overview of Project

1. Overview

The Greater Manchester Strategic Alliance (GMSA) is a partnership of universities, colleges, work based learning providers and other stakeholders that delivers a Lifelong Learning Network (LLN) and promotes the progression of vocational learners into Higher Education. In support of this delivery, the GMSA runs two overarching projects that depend critically on course information; ModCAT providing modular learning options that can be combined into higher awards and the Vocational Course Catalogue (VCC), a larger collection of part-time vocational Higher Education courses in Greater Manchester.

In order to create catalogues of courses the GMSA wants to adopt a course description standard - to enable interoperability across the partnership and within its own systems. The GMSA needs to investigate and evaluate the technical implications of delivering such a standard to further the ModCAT and VCC projects, and also present an environment to practically demonstrate the value added from standardising, sharing and aggregating course information. As well as benefiting the GMSA partnership, outcomes from the project are also intended to be fed back into the XCRI project and community as a whole. By using technology to collect, transform, aggregate and display course information, the project will demonstrate how the administrative processes associated with learning and teaching can be supported and improved, and what new opportunities may be exploited as a result.

2. Aims and Objectives

To examine the technical and procedural factors of utilising a course description specification in support of the GMSA overarching projects, ModCAT and Vocational Course Catalogue.

- Investigation of existing course storage methods by consultant visit;
- Raising CourseExchange software to XCRI-CAP 1.1 compliance;
- Development of process model for course information submission for each institution;
- Deployment of CourseExchange software;
- As many course descriptions as possible from each institution mapped to the XCRI-CAP 1.1 standard, using CourseExchange software;
- Aggregation of course descriptions from each institution;
- Publication of combined course descriptions at a public URL;
- Identifying and drawing conclusions from events and issues at each stage;
- Using knowledge learned to successfully deliver ModCAT and VCC and refine XCRI-CAP 1.1.

3. Overall Approach

Project work will be distributed across the University of Manchester, Tameside College and the University of Salford and will be managed and coordinated by the GMSA.

A consultant visit (APS Ltd) to each institution will serve to document the existing storage methods of course information, and develop a bespoke business process for each institution to map course information to XCRI-CAP 1.1. This process will include identifying workable sources of course information and recommending suitable transformations of it using software provided by Phosphorix. Mainstream undergraduate courses and information at the modular level will be of primary interest; other courses, such as those at Post Graduate level, will only be included should resources at a given institution permit. What courses should be included is expected to vary between institution and be

determined by the results of the consultant visit, the factors surrounding this will be reported on and be of high value.

Phosphorix will be asked to bring their current version of CourseExchange software to XCRI-CAP 1.1 compliance and provide expertise in assisting the GMSA in deploying the software and in using a working example. Issues and findings arising from this exercise will be included in the evaluation of the project, but will not include a critical assessment of CourseExchange in its own right.

A primary output of the consultant visit will be an Action Plan to be written for each institution, which at its highest level will describe a series of next steps to complete. It is expected that the transformation, mapping then aggregation will form the spine of the work after this point and will begin as an iterative process, repeating activity where necessary as events occur. This will include aspects relating to refreshing and updating already acquired course information. Concurrency of course mapping and aggregation processes, as well as course descriptions are of critical importance.

A technical representative at each institution will be responsible for acquiring course information and mapping it to the XCRI-CAP 1.1 standard, using CourseExchange and recommendations from the consultant findings. The time required to do this and a final statement of the resource needed by each institution will be provided at a later date as an output of the consultant visit. The representative will be asked to evaluate from their perspective inside their institution, the technical and procedural aspects to this exercise. Issues surrounding the acquisition and mapping of viable course information will be of critical importance.

The final stages of the project will include publicising the aggregated collection and investigating the potential uses and limitations of it.

4. Project Outputs

Tangible:

- Analysis and description of course storage methods, at each institution;
- Process model of course information generation, at each institution;
- XCRI-CAP 1.1 compliant version of CourseExchange;
- Course information mapped to the XCRI-CAP 1.1 standard from each institution (XML/text);
- Aggregated Course Information (XML/text - publicly available);
- Progress Report;
- Technical Report – findings aimed specifically at a technical audience and for inclusion into the design documentation of ModCAT and VCC;
- Recommendations for further refinement of the XCRI-CAP 1.1 standard;
- Final Report.

Intangible:

- Ability to incorporate XCRI into the design and delivery of ModCAT and VCC;
- Updating existing methods of course description at stakeholder institutions.

5. Project Outcomes

- Capacity for utilisation of XCRI at the GMSA and in partnership institutions;
- An increased awareness of the potential benefits of sharing course information, from the point of view of marketing, quality assurance, administration and enrolment;
- Realisation of the benefits provided by implementing XCRI-CAP 1.1;
- Wider participation and involvement with the XCRI project;
- Return on investment with knowledge gained for JISC and specifically the XCRI project;
- Positive proof that openness, standards and collaboration are a good thing and serve to benefit the individual (institution) as well as the community.

6. Stakeholder Analysis

Stakeholder	Interest / stake	Importance
University of Manchester	Increased interoperability with other organisations e.g UCAS	High
University of Salford	Generation / Aggregation Course Information	Medium
Tameside College	Improvement of internal systems utilising course description	High
GMSA	Aggregated course descriptions from partners	High
JISC	Realisation of XCRI project benefits	High
Wider HE and FE community	Documented improved methods of course description	Medium
XCRI Project	Refinement suggestions	High

7. Risk Analysis

Risk	Probability (1-5)	Severity (1-5)	Action to Prevent/Manage Risk
That the project could lose staff part way through	1	3	Project management process clear; timelines flexible enough to allow for re-staffing
Participating institutions lose interest	1	4	Association with the GMSA well established to prevent this
CourseExchange software not XCRI-CAP 1.1 compliant	2	4	Initiate CourseExchange deployment early
Engagement with institutions does not reach operational level	3	4	Communication of commitment to project by management to staff
That there will be significant Political barriers at institutions to inhibit the project	3	3	Representatives for the project at institutions pledged to 'clear the way'
Communication break down	2	2	Relationships well established to resolve quickly and easily
Legal issues regarding publishing of course data that has institutional copyright	1	3	Consideration of project in GMSA parallel activity of IPR and legal investigations. Whilst theoretically a problem, discussion reveals that it is not considered a likely threat.

8. Standards

Name of standard or specification	Version	Notes
XCRI-CAP	1.1	
XHMTL	1.1	
CSS	2.1	
XSLT	2.0	

9. Technical Development

CourseExchange from Phosphorix Ltd;
Specific further development of CourseExchange will include XSLT, Java, Spring, Struts, JSP, XML, web services. Phosphorix employ agile methodologies from RAD, XP and a growing interest in the JISC UIDM. OSS products include ioNetworkNode and ioMorph, Apache Tomcat, Apache, mod_jk, postgres, Hibernate.

10. Intellectual Property Rights

All intellectual property gained from the project will be owned by the GMSA host institution Manchester Metropolitan University, with the exception of advances in CourseExchange which will be retained by Phosphorix Ltd.

Project Resources

11. Project Partners

John Mccall
Tameside College
Beaufort Road
Ashton-under-Lyne
Lancashire
OL6 6NX
0161 908 6698
john.mccall@tameside.ac.uk

Abdul Hamid
The University of Manchester
Oxford Road
Manchester
M13 9PL
0161 275 8848
abdul.hamid@manchester.ac.uk

Patrick Lauke
The University of Salford
Greater Manchester
M5 4WT
0161 295 4779
p.h.lauke@salford.ac.uk

Selwyn Lloyd
Phosphorix Limited
Seolea
Tedburn Road
Exeter
Devon
EX4 2HD
07979 240124
operations@phosphorix.com

Alan Paull
APS Ltd
58 Norton Wood
Forest Green
Nailsworth
Stroud
Glos.
GL6 0HG
alan@alanpaull.co.uk
07977 120886

12. Project Management

GMSA Database Officer Tom Grahame has been assigned the role of Project Manager with substantial support from GMSA JISC Projects Director Roger Clark. It is expected that the Project Manager will devote 9 days in total to managing, coordinating, providing technical assistance with and documenting the project.

GMSA
Tresco House
149 - 153 Oxford Road
Manchester
M1 7EE

tom.grahame@gmsa.ac.uk
0161 921 8045

roger.clark@gmsa.ac.uk
0161 921 8036

13. Programme Support

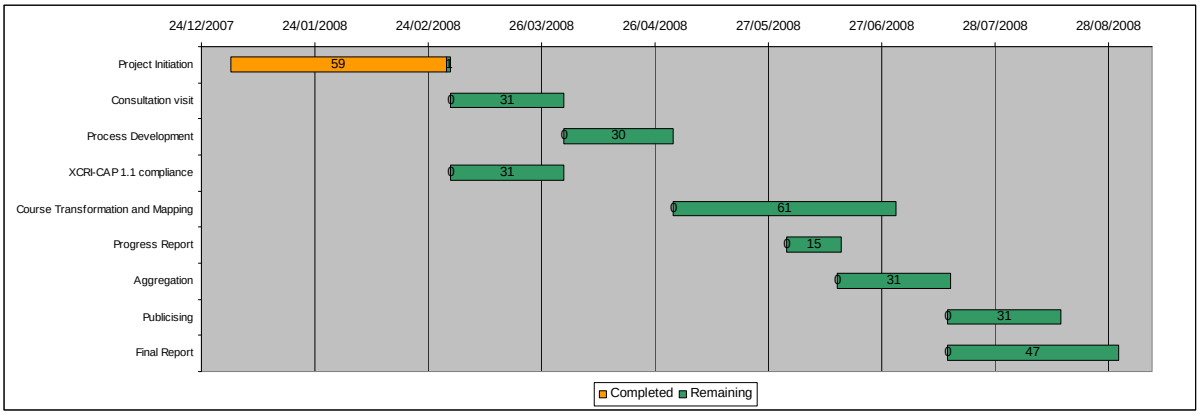
<Indicate if there are specific areas where you would like support from the programme or programme manager.>
Provision of advice regarding structure and content of progress and final reports.
Identification of deliverables required, particularly with respect to documentation, not yet identified in this plan.

14. Project schedule/workpackages

The project will be broken down into stages, defined by the type of activity required to advance the project. Each stage will have a general activity and tangible deliverables/outputs – please note these are expected to change as the project progresses.

Stage	Activity	Deliverables
Initiation	Meetings between members and stakeholders	Agreed Project Plan
Consultant Visit	Investigation of course at each	Assessment document

	institution	
Process Development	Business process development for acquiring, transforming and mapping course information	Process modelling documentation; Action Plan
XCRI-CAP 1.1 Compliance	Software development	Working version of CourseExchange
Course Transformation and Mapping	Mapping course information to XCRI-CAP 1.1 (This forms the spine of project activity)	Process evaluation (template document to be defined); Course Descriptions in XML format
Progress Report	Meetings between members and stakeholders	Progress Report
Aggregation	Aggregation of course descriptions	Aggregated course descriptions in XML format
Publication	Publication of course descriptions	Resolvable URL
Closing Stages	Collation of findings, meetings with members and stakeholders	Final Report



15. Budget

GMSA is offering to match fund the JISC contribution in order to widen the scope of the project.

Directly Incurred Staff	**Feb-Mar 08**	**Mar-Aug 08**	**TOTAL £**
Alan Paull consultancy visits	[redacted]	[redacted]	[redacted]
Technical contact time at University of Manchester	[redacted]	[redacted]	[redacted]
Technical contact time at Tameside College	[redacted]	[redacted]	[redacted]
Technical contact time at University of Salford	[redacted]	[redacted]	[redacted]
Project Management	[redacted]	[redacted]	[redacted]
Phosphorix – Publishing XML		[redacted]	[redacted]
Phosphorix - CourseExchange	[redacted]	[redacted]	[redacted]
Total Directly Incurred Staff (A)	**£ 900**	**£ 17100**	**£ 18000**
Non-Staff			
Travel and expenses	£	£ 800	£ 800

Hardware/software	£	£	£
Dissemination	£	£	£
Evaluation	£	£	£
Alan Paull Reports	£	£ 1200	£ 1200
Other	£	£	£
Total Directly Incurred Non-Staff (B)	**£**	**£ 2000**	**£ 2000**
Directly Incurred Total (A+B=C) (C)	**£ 900**	**£ 19100**	**£ 20000**
Directly Allocated			
Staff	£	£	£
Estates	£	£	£
Other	£	£	£
Directly Allocated Total (D)	**£**	**£**	**£**
Indirect Costs (E)	**£**	**£**	**£**
Total Project Cost (C+D+E)	**£ 900**	**£ 19100**	**£ 20000**
Amount Requested from JISC	**£**	**£**	**£ 10000**
Institutional Contributions	**£**	**£**	**£ 10000**
Percentage Contributions over the life of the project		**JISC X %**	**Total 100%**