# Australian Higher Education Executive Model

## Requirements, Plan, Workload



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# Data Requirements

**The data requirements listed below are indicative and will vary from system to system. Where the fields listed differ from actual systems used please determine the most appropriate field that most closely matches that described.**

## STUDENT DATA

Student data is needed to show which students are enrolled in what Program, Course, Semester, Campus and how many credit hours are received. If there is an extract already in place that contains additional fields to those listed, please provide the entire extract to us – we may be able to use the data for additional analysis fields or better cost drivers.

### PERIOD:

- Most recent completed fiscal year

### FORMAT (IN ORDER OF PREFERENCE):

- CSV / Text File
- Microsoft Access database table
- Microsoft Excel spreadsheet

### FIELDS (EXAMPLE DATA IS CONTAINED IN BRACKETS):

- Academic Year (i.e. 2017)
- Student Identifier (ID #)
- Fee Type (Fee Paying Domestic, International Onshore, International Offshore, CGS, Enabling, Non Award etc)
- EFTSL (or credit points)
- Course Code (BCOMM)
- Course Name (Bachelor of Commerce)
- Course Career (Undergraduate, etc)
- Course Owning Faculty (Faculty of Business and Economics)
- Course Owning Dept (School of Accounting)
- Major Code (ACCT-MAJ)
- Major Code Name (Accounting)
- Unit Code (BUSN1002)
- Unit Name (Accounting Processes and Systems)
- Unit Level (1st year, etc)
- Unit Mode (In person, Blended, Online etc)
- Unit campus (Sydney, etc)
- Session Code
- Session Name (Semester 1, Online Trimester, Winter, etc)
- Teaching Dept Code (i.e. 12345)
- Teaching Dept Name (Department of Accounting)
- Govt Funding Cluster Code (1)
- Govt Funding Cluster Name (Law, accounting, administration, economics, commerce)
- Field of Education (FOE) – 6 digit level
- ATSI (Yes / No)
- SES (Yes / No or Low/Medium/High etc)
- Actual Fees paid (nice to have if available)
- HECS Band
- Commenced / Continuing Key
- Pass / Fail

# Student Timetabling/Scheduling Data

Timetable/Schedule data is required to outline the type of class, the hours of lecture/lab/etc., time, the room the course was taught in (nice to have), and the staff who taught the course (not always available).

It is appreciated that not all timetabling systems cover 100% of bookings. An initial data check is a review of the data for "completeness". It's not uncommon for some Schools (like Medicine) to not have any classes in the timetabling system at all. It is also not uncommon for there to be numerous timetabling files (sometimes one for each campus). This is not an issue.

With this request (and all the others), it is requested that whatever the source system supplies in the first case is what is provided to Pilbara Group. In most instances it is possible to often derive the information from out-of-the-box data extracts rather than complicate the data extract. Therefore, if there is an extract already in place that contains additional fields to those listed, please provide the entire extract to us – we may be able to use the data for additional analysis fields or better cost drivers.

**PERIOD:**

- Most recent completed fiscal year.

**FORMAT (IN ORDER OF PREFERENCE):**

- CSV / text file
- Microsoft Access database table
- Microsoft Excel spreadsheet

**FIELDS (EXAMPLE DATA IS CONTAINED IN BRACKETS):**

- Room Number / code
- Building Code
- Building Name
- Capacity (Student capacity size, i.e. 30 students)
- Class Type (Tutorial, Lecture, Seminar etc)
- Avail weeks (52)
- Unit Code (BUSN1002)
- Unit Name (Accounting Processes and Systems)
- Duration (in hours) (sometimes this comes in the format of a Start Time field and an End Time field)
- Activity occurrences (Number of occurrences per session / semester etc, often 13, representing 13 weeks). Sometimes this comes in the format of a yes/no map for each week of the year (ie 1 1 1 1 1 1 1 1 1 1 1 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0)
- Day (Monday)
- Start time
- End time
- Activity size (students attending in theory)
- Teaching Dept Code
- Teaching Dept Name (School of Accounting)
- Campus (Sydney etc)
- Session (Semester 1 etc)
- Teaching Load Percentage (only needed if the same Unit is taught by multiple schools)
- Teaching Load Owner (only needed if the same Unit is taught by multiple schools)
- Piggybacked / Cotaught Unit identifier (if unit is taught in same room as same time as another units, for example, Business Systems 101 and Information Systems 101 may be the same content but with two unit IDs)
- Instructor ID (Employee ID of instructor)
- Instructor Percentage (if unit is taught by more than one instructor)

# HR/Payroll Data

**HR data is needed to define information on personnel employed by the university. For example: what is the staff type (Academic/Non-academic)? What is their employment type (Permanent, Part-time)? What is their job function (Teaching, Teaching and Research, Research only, etc.)?**

**Payroll data is needed to link personnel to the financial data systems from which they were paid. HR/Payroll data is often a large extract, so it is not an issue if it comes in a number of files. Pay data often needs to come as one file for each pay-period - 26 files where staff are paid bi-weekly. HR establishment data is normally a separate file.**

**If there is an extract already in place that contains additional fields to those listed, please provide the entire extract to us – we may be able to use the data for additional analysis fields or better cost drivers.**

### PERIOD:

- Most recent fiscal year.

### FORMAT (IN ORDER OF PREFERENCE):

- CSV / Text file
- Microsoft Access database table
- Microsoft Excel spreadsheet

### FIELDS (EXAMPLE DATA IS CONTAINED IN BRACKETS):

- **HR Establishment Data Fields:**
  - Employee number - if there is concern about data privacy, please note that no-one gets to see the HR module in the model and it is not contained in the reports at all – it is only there to help allocate salaries to the correct activity, such as teaching, research, etc. If providing the employee number will be an issue, there are other options; however it does help when wanting to allocate certain people to specific activities as it provides a key identifier.
  - Status (full time, part time, sessional etc)
  - Owning Dept Code
  - Job Number and / or Position Number
  - Level (HEW / Band etc)
  - Award - Academic or Professional/General
  - Workload Function employed under (Teaching, Teaching and Research, Research Only, General etc) – not always available
  - Position title (Research Assistant, Lecturer etc)
  - Campus

- **HR Pay Data Fields:**

  Please note that with pay data, our preference would be to receive:
  - Employee number
  - Sum of Amount (Pay per pay period)
  - Sum of FTE (per pay period)
  - Dept ID paid from
  - Natural Account Code paid from
  - Fund code paid from
  - Pay Code
  - Pay Code description (long service leave, sick leave etc)
  - Units (hours) paid

  If FTE is not available, then the additional fields below would be required for us to estimate FTE:
  - Hours paid
  - Pay period number (often 1 to 26 if paid bi-weekly, 1 to 12 if paid monthly)
  - Pay code (sick leave, annual leave, overtime, etc.)

*Please note that salary and HR establishment is not shown in the model unless specific reports and associated access is requested and approved from within institution.*

*With respect to Uniforum (Cubane) data, this is normally provided in a spreadsheet by employee ID, with the relevant functions/tasks/sub-tasks and percentages listed for each employee ID.*

*With respect to Academic workload data, this may not available at an individual level, and may not exist at all. If however, there are known / agreed / or assumed workloads by Faculty or School, or maybe by level (A, B, C, D E etc), then these can used if appropriate.*

# GL/Financial Data

**The GL / Financial data is used to determine organizational structures, the chart of accounts, fund source information and project information for all financial transactions by the university. It doesn't bother us whether the data arrives as one big table, or a table of cost centers, account codes, and project codes totals with a set of lookup tables describing the codes we are seeing – whatever is easiest from an extraction point of view.**

**If there is an extract already in place that contains additional fields to those listed, please provide the entire extract to us – we may be able to use the data for additional analysis fields or better cost drivers. Basically, any fields that lets us organize and categorize the data is useful, and of course, if there is anything specific that you would like included for reporting, just let us know.**

### PERIOD:
- Most recent fiscal year

### FORMAT (IN ORDER OF PREFERENCE):
- CSV / Text File
- Microsoft Access database table
- Microsoft Excel spreadsheet

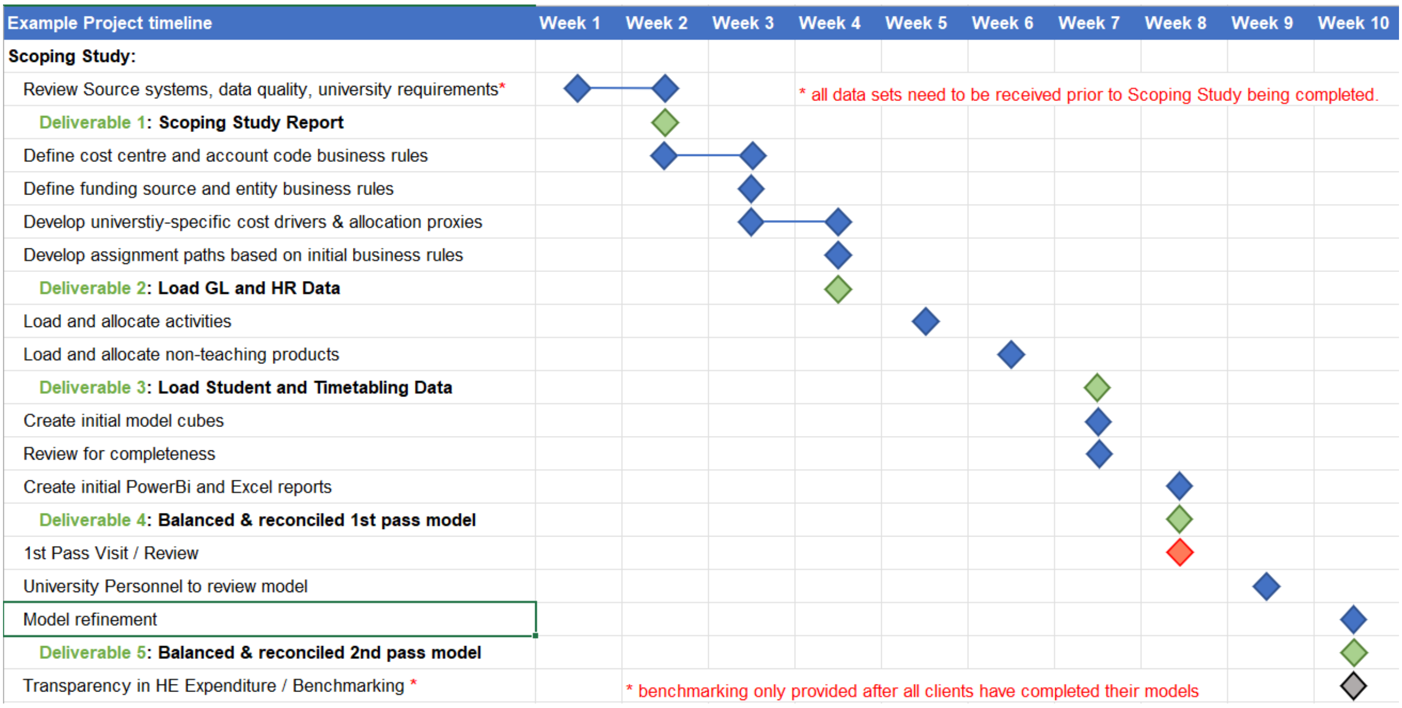
### FIELDS (FIELD NAMES ARE INDICATIVE):
- Entity Code (if the instition has more than one entity)
- Entity description (University of XX, etc). Please note that not all entities may be required in the model – only those that will affect the overall cost of teaching and research.
- Ledger Segment / Fund Code (i.e. R)
- Ledger Segment Code name (i.e Recurrent)
- Dept ID / Cost Centre Code / Budget Centre (12345)
- Dept ID description (Department of Nuclear Physics)
- Natural Account / Account Code (5208)
- Natural Account description (Electronic and electrical materials)
- Project Code (345678)
- Project description (Project XYZ)
- Amount ($120,350) (sum for the entire calendar year)

### LOOKUP DATA:

- **Chart of Accounts (COA) (this is illustrative only):**
  - Chart of Accounts Level 1 Description (i.e. Assets, Equity, Expenditure, Revenue, Liabilities)
  - Chart of Accounts Level 2 Description (i.e. Operating Expenditure, Non Operating Expenditure)
  - Chart of Accounts Level 3 Description (i.e. Salaries and Oncosts, Facilities etc)
  - Chart of Accounts Level 4 Description (i.e. Academic Salaries and Oncosts, Facilities etc)
  - Natural Account Code
  - Natural Account Code Description
- **Organization Hierarchy (this is illustrative only):**
  - Organisation level 1 Code (if applicable)
  - Organisation level 1 (Entity) description (University of XX)
  - Organisation level 2 Code
  - Organisation level 2 (Faculty) description (Faculty of Physical & Mathematical Sciences)
  - Organisation level 3 Code
  - Organisation level 3 (Business Unit) description (School of Physics)
  - Organisation level 4 Code
  - Organisation level 4 (Dept) description (Department of Nuclear Physics)
  - etc

If there are any other components of the accounting string that are used, then these should also be included (campus etc)

# Estimated Project Plan




# University Level of Effort

| University Role | Indicative Commitment | Suggested Effort / Time |
|---|---|---|
| Project Manager / Team | Provide single point of contact for Pilbara Team regarding logistics for onsite visits<br><br>Liaising with source data owners to obtain data extracts<br><br>Good working knowledge of University operations beneficial | Predominantly during all onsite visits (if applicable)<br><br>Liaising with source data owners to obtain data extracts will be required prior to first visit. |
| System owners / managers / Subject Matter Experts (SME) | If required, virtual meetings to be held with each of the source system owners / SMEs:<br>- GL<br>- HR / Payroll / Uniforum<br>- Timetabling<br>- Student Enrolment | 30-60min per system<br><br>Ability to answer questions throughout model development (via Teams / email) |
| Project Team | Weekly Teams meetings and/or status reports as needed<br><br>Virtual sessions to go through 1st pass / 2nd pass issues/concerns | 30 minutes<br><br>60-90min sessions as required |
| DVC Academic / Deans (or representatives<br><br>Senior Executive | (Optional) Virtual sessions to go through model methodology and initial results | 30-60min sessions if required |