

Surviving SIS Conversions & Upgrades

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OACRAO | October 26, 2023

Housekeeping

- **About Me**
- **About UTRGV**
- Disclaimers
- Who's in the room?
- Why is this an important topic?

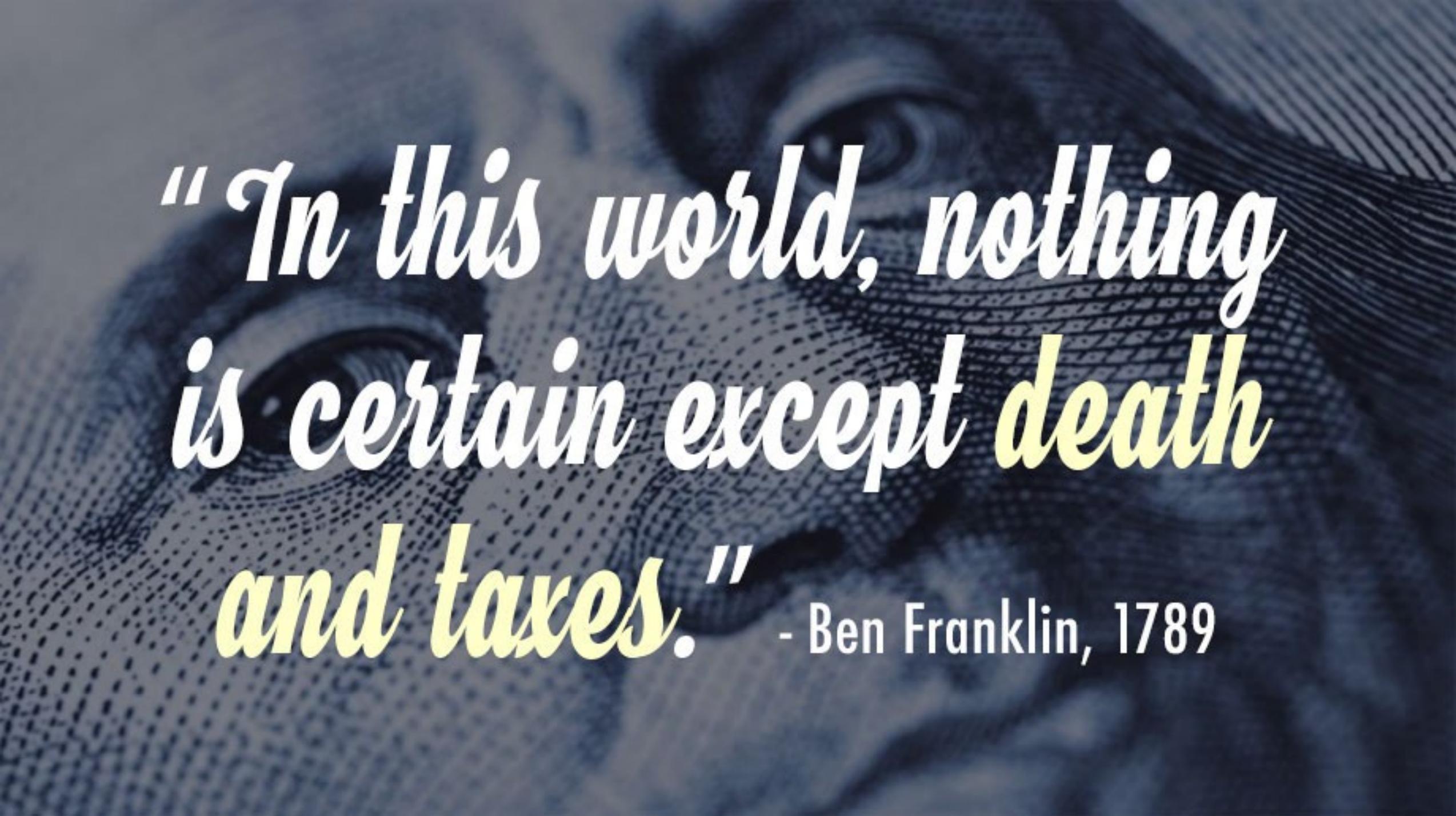


Housekeeping

- About Me
- About UTRGV
- **Disclaimers**
 - **The presenter and this presentation are not perfect :-O**
 - **This presentation and its ideas are not all inclusive**
- **Who's in the room?**
- Why is this an important topic?

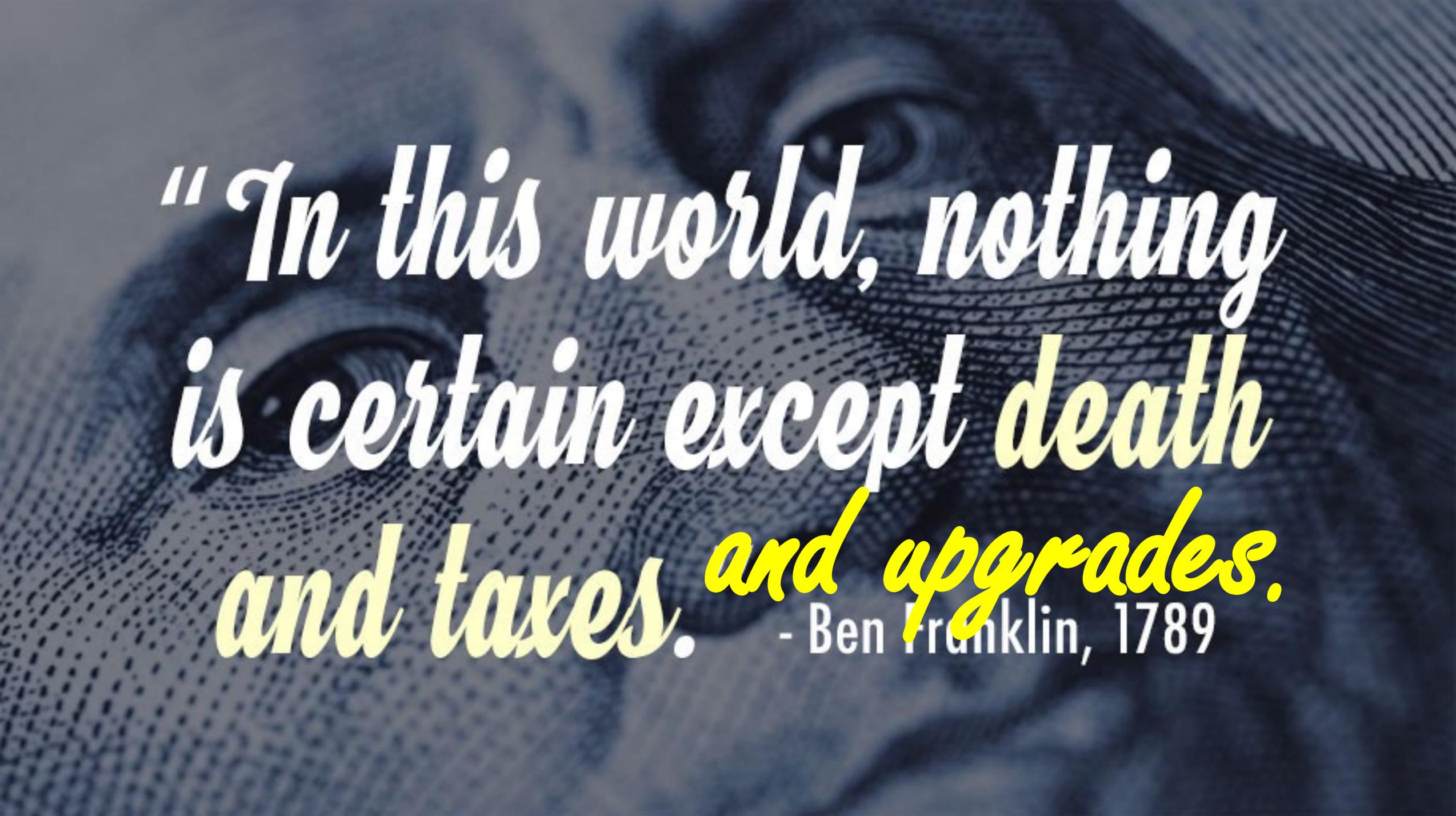
Housekeeping

- About Me
- About UTRGV
- Disclaimers
- Who's in the room?
- **Why is this an important topic?**
 - **Your SIS is the backbone of campus operations and the lifeline of students.**
 - **Supplemental software; data transmission; data extraction; data exchange.**
 - **We get buried in the technical.**



*"In this world, nothing
is certain except **death
and taxes.**"*

- Ben Franklin, 1789



*"In this world, nothing
is certain except death
and taxes. and upgrades.*

- Ben Franklin, 1789

Roadmap

I. Why Upgrade?

II. Tools:

- Timelines
- Resources: People, Skills, Groups; Colleagues and Counterparts

III. In Retrospect:

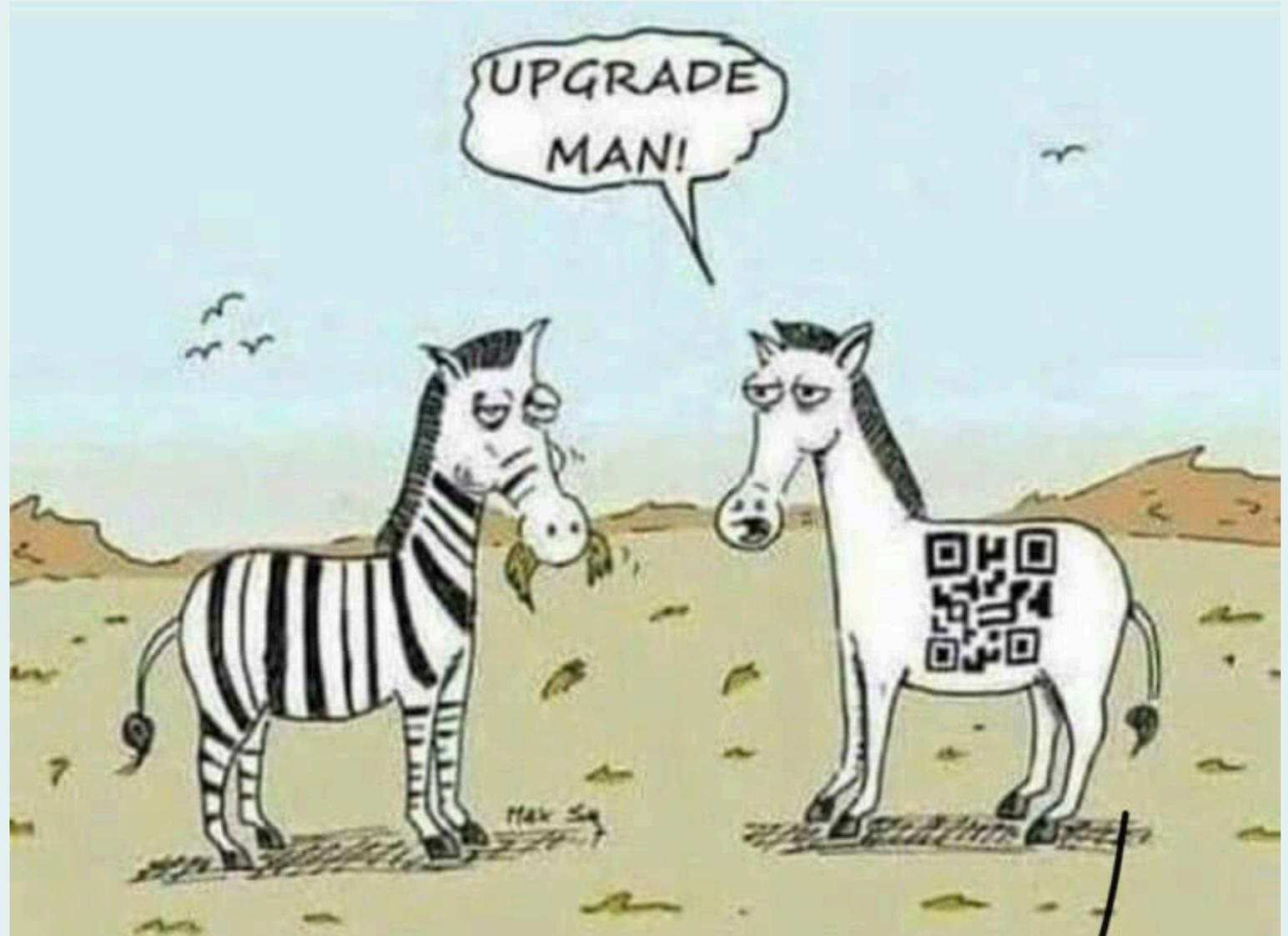
- Good Ideas
- BAD Ideas
- Other Thoughts

IV. Show & Tell



I. Why Upgrade?

- Because I said so!
- But seriously...





...Why Upgrade? (cont'd.)

- Upgrades to a student information system and the functions related to it are not uncommon.
- Upgrades are often done to evolve with technology and achieve improved aesthetics and navigation.
- If an institution does not upgrade, there is inevitable loss of support from the vendor.

II. Tools: Timelines

Quick Story: My Aunt Dolores (we assume poor punctuality!)

Assume delays!

Use status meetings to hold each other jointly accountable but *not to waste each other's time*

See the timeline, breathe the timeline, BE the timeline

Create a calendar in MS Outlook that you can overlay with yours (will demo)



II. Tools & Prep: Resources

- **People/Skills**

- Who's pitching, and who's out in left field?
- It had to be you?  Nope; not true. Empower others to have important roles, too!

- **Coordinate Groups and Choose Contributors Strategically**

- Heavy users (not addicts) → those that heavy utilize your SIS and/or certain functionality
- Veteran nay-sayers → those that resist change and tend to be pessimistic
- Tough audiences → those that always give your office a hard time; that means they usually are very involved and pay attention to detail

- **Colleagues and Counterparts in HE: Check with them! Get feedback!**

- OACRAO, for example; Registrar buddies (or others)
- Other SIS/system/software clients!!!
- And, yes, the vendor and/or consultants

II. Tools & Prep: Getting Ready

- A Good Offense is the Best Defense
- Consider Conflicting Priorities – but be realistic
 - It is **never** a perfect time to implement. Just avoid major overlapping implementations (such as, *for example*, SIS change plus a CRM change and catalog software)
- Your BAs, Programmers, Developers
 - Know your *existing* modifications
 - Purpose?
 - Obsolete?
 - Alternatives!
 - Make no assumptions – include stakeholders if purpose/need are not fully known and understood
- Anticipate Disappointment

III. In Retrospect: An Upgrade in Review – BAD Ideas

- **Status Meetings** (they can get tiring and frustrating if folks don't pull weight)
- **Optimism:** Assume the worst; Celebrate the opposite
- **Faculty Users v. Student Users v. Staff Users**
 - Same needs? Same challenges?
 - It's not all about the size of the population.
 - What changes can they expect?
 - Example: "College Scheduler"

III. An Upgrade in Review – Good Ideas

- **Status Meetings** (they are frustrating, but helpful)
- **COMMUNICATE – to EVERYONE about the changes, in advance!**
 - Senior leadership; Faculty; Students; IT
 - Email
 - BB (LMS) Messages
 - Portal announcements
 - Social Media
 - TV Screens
 - Campus Community/Partners
 - Make the rounds: FS; Faculty; One Stop Shop; Academic Advising; Councils.
 - Be ready to respond; be sympathetic.
 - Consider blocking calendars to be readily available to address concerns, demo, screen-share
 - Be mindful of your words! Productive/constructive language. Positive.

Explain why this is being done. Be approachable.

III. An Upgrade in Review – Good Ideas (cont'd.)

- **User Guides Galore** (showcase of UTRGV's web-accessible resources forthcoming)
 - Written
 - Video
- **Zoom, Zoom**
 - Presentations were similar, but tailored, because... **One size does not fit all.**
 - Live!
 - Record 'Em
- **Find Your Zen**
 - Be Available: Calls, Emails, IM
 - Follow Through!
 - Delegate!

The screenshot displays the U Central website's navigation and content. At the top, a breadcrumb trail reads "Student Resources / ASSIST Guides". The main header identifies the site as "U Central" and the "Division of Strategic Enrollment and Student Affairs". A dark orange navigation bar contains links for Home, Registration, Grades and Transcripts, Paying for College, Graduation, Student Resources, Faculty & Staff Resources, Contact Us, and HEERF. A sidebar menu titled "U Central Student Resources - Related Links" lists various services like ASSIST Guides, Degree Works, Student Forms, Account Holds, Document Upload, Online Services, Schedule Academic Advising, Blackboard Support, Student ID Card, and Parking & Transportation. The main content area is titled "ASSIST Student User Guides" and features a banner about the system's upgrade to a mobile-friendly interface. Below the banner, there are sections for "Registration Guides" (including links for adding/dropping/waitlisting classes), "Instructional Videos" (with links for how to register, waitlist, and drop a class), "Adding Linked Courses", another "Instructional Video" (for linked lectures and labs), "Conditional Adds and Drops", "Using Plan Ahead", and "Registering Using Previously Saved Plan from Plan Ahead".

III. An Upgrade in Review – More Thoughts

- Luxury List
 - Second and third tier priorities
 - Enhancements
 - *YOU CANNOT FIT IT ALL IN*
- Plan to never let it go.
 - Follow-ups
 - Tier 2 and 3
 - Recurring meetings
 - Repurposed meetings
- Don't worry about what you can't control, but **be cognizant of what you can influence.**



IV. Show & Tell

- User Guides
- Calendar Overlays
- Dialogue

