Through **Kuali** we **invest** in the **future**

The ultimate objective of the NWU's involvement with the Kuali initiative is to create an environment of software or systems that meets the university's needs and are cost-effective in the long term.

This was the message conveyed to NWU staff at a Kuali workshop in Potchefstroom on 20 March 2013.

Kuali comprises a growing group of universities and colleges in the United States and Canada that have been developing software for higher education institutions for the past nine years.

During the workshop the spotlight fell on two of the Kuali systems. The one was Kuali Student, a student administration system that the NWU is helping to develop, and the other was Kuali Financial Systems, which has already been developed and which the NWU wants to implement.

More than 150 staff members who are in some way involved in the financial system and the student administration system on the three campuses and in the Institutional Office attended the workshop sessions.

"More is involved here than just the two Kuali systems in which the NWU is interested. In the end we are concerned with the long-term benefits of the NWU's involvement in the Kuali initiative," says Mr Attie Juyn, chief director of Institutional Information Technology.

These benefits include the appropriateness of systems, cost savings and the building of support capacity.

KUALI IS A PERFECT FIT

Kuali systems are specifically designed and developed by higher education institutions to meet the needs of this sector – something that does not always happen with commercial software.

"As co-developers of Kuali Student we have the opportunity to ensure that it is compatible with the South African higher education environment and our own needs," says Attie.

Because the NWU is a full Kuali partner, the NWU has a seat on the Kuali Student board, where important development decisions are made.

Kuali systems can handle different levels of complexity, for instance in institutions such as the NWU that consist of different campuses.

FINANCIAL BENEFITS

In view of decreasing government subsidies in the higher education sector, it makes good business sense to invest in Kuali systems.

In the first instance Kuali partners avoid the high licence and maintenance fees of commercial products and are not subject to the so-called 'forced march'.

The latter involves continuous, compulsory and usually very expensive upgrades to a new version of the system because the company supplying the software no longer supports the previous version.

In the second place the different partners involved in the development of Kuali systems share the development costs because they all provide staff, expertise and time.

Thirdly, the developed systems are protected as they are the intellectual property of Kuali. This means that the Kuali Foundation and its projects control and protect the future of the products.

This community-source software is more secure than open-source software as no one outside the Kuali community can change it.

Kuali in South Africa

The NWU is currently the only university outside North America that is a full Kuali partner, but it seems as if other South African universities are also interested in joining.

In March 2013, delegates from various South African universities attended a Kuali conference that was presented jointly by the NWU, the University of Stellenbosch and OpenCollab (Pty) Ltd

(the first South African Kuali Commercial Affiliate). The other institutions represented there included the University of Cape Town, University of Johannesburg, University of Limpopo and University of the Western Cape.

 "We would welcome it if other South African universities become involved in Kuali," says Attie Juyn, chief director of Institutional Information Technology.

When this happens, the NWU will be in a position to provide guidance and support to these universities.

In turn, the other South African universities will be able to help further adapt the Kuali systems to the conditions and needs of the country's higher education sector.

"In this way we not only share development costs, but also expertise and ideas," says Attie.

Kuali representatives also addressed the Institutional Management and campus registrars at the workshop on 20 March 2013. Attending the session were, from the left, Mr Raijiv Kaushik of the University of Toronto, Mr Attie Juyn, chief director of IT, Dr Theuns Eloff, vice-chancellor, Prof Bob Cook, chief information officer of the University of Toronto, Mr Barry Walsh, strategic adviser of the Kuali Foundation, and Prof Frikkie van Niekerk, Deputy Vice-Chancellor: Research, Innovation and Technology.

A fourth benefit is that the implementation costs of Kuali products are lower. If an institution (like the NWU) was involved in the development of the system, it is easier, quicker and cheaper to implement as the necessary expertise has already been acquired during the development phase.

KUALI BUILDS CAPACITY

Companies that develop and supply commercial products tend to keep the knowledge about the internal operation of their products to themselves. This means that their clients remain dependent on them for system maintenance.

In contrast, the Kuali community emphasises the sharing of expertise and the building of participating universities' own capacity.

"NWU staff who are involved in the development of Kuali Student have already acquired valuable knowledge and in turn have shared their skills with the American developers," says Attie.

Expert programmers are in great demand, but Attie is certain that the NWU will retain the expertise of its teams precisely because they receive such good exposure and development opportunities.

"Our team members find it very exciting to participate at international level in the development of such a new-generation student system," he says.

The technical teams also use Kuali Rice, which involves a specific method and technical tools for the development of all Kuali products.

"The benefit of this is that the same programmers who are helping to develop Kuali Student also have the knowledge to make the adjustments that are necessary for us to implement Kuali Financial Systems at the NWU."

Financial system to change in the future

To create the ideal computer systems environment at the NWU, the university has to take certain steps.

One of these is to implement Kuali Financial Systems (KFS) by the end of 2014. It will replace the current Oracle 11 as part of the NWU's Kuali-Oracle (*KOI) initiative.

This financial system, which was designed specifically for the higher education environment, had already been fully developed when the NWU became involved with Kuali

in 2010 – in fact, it was the very first Kuali system to be developed.

Before the NWU can implement Kuali Financial Systems, certain adjustments have to be made. One of these is to provide for value-added tax (VAT), which among the countries involved in Kuali is unique to South Africa.

"In the coming months the special task team comprising financial experts in the Institutional Office will determine what the gaps between the new system and the current Oracle system are,

and how these can be overcome," says Mr Erik Marx, programme manager with Institutional IT.

The task team will continuously communicate the gaps, needs and requirements to IT's technical team so that the required adjustments can be made.

In terms of the Kuali-Oracle (KOI) initiative, Kuali Financial Systems will replace Oracle Finances 11, and the human capital system will be upgraded later this year from the current Oracle 11 to Oracle 12.