

UNIVERSITY OF ILLINOIS SYSTEM

URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

IT PRIORITIES COMMITTEE PLANNING SUMMIT

Date: Tuesday, April 11, 2017

Time: 10:00 a.m. – 3:00 p.m.

Loc: I Hotel and Conference Center, Champaign, IL

Goal: Collaborative planning to improve administrative business process efficiency and effectiveness and redesigning processes and software.

- | | |
|----------------------------|---|
| 10:00 am – 10:30 am | Registration and Light Refreshments
Location: Chancellor Ballroom Lobby |
| 10:30 am – 10:35 am | Opening Remarks and Welcome
Dr. Michael Hites, Senior Associate VP and CIO, Administrative IT Services |
| 10:35 am – 10:45 am | ITPC Overview: Mission and Process, Strategic Overview
Overview of the Day's Format, Goals, and Expectant Outcomes
Dr. Michael Hites, Senior Associate VP and CIO, Administrative IT Services
Location: Chancellors Ballroom |
| 10:45 am – 10:50 am | Introduction into Breakout 1
Location: Chancellor Ballroom |
| 11:00 am – 11:50 am | Group Breakout 1
<i>Goal: Enhancing Capabilities for System Business Process Efficiency and Effectiveness</i>
<i>Location: See Nametag, Table Number Assignment, and Map</i> |
| 12:00 pm – 12:15 pm | Open Discussion of Breakout 1
Location: Chancellor Ballroom |
| 12:15 pm – 12:50 pm | Lunch
Location: Chancellor Ballroom |
| 1:00 pm – 1:20 pm | Remarks from Dr. Wilson
Dr. Barbara Wilson, Executive Vice President & Vice President for Academic Affairs
Location: Chancellor Ballroom |
| 1:20 pm – 1:30 pm | Introduction into Breakout 2
Location: Chancellor Ballroom |
| 1:40 pm – 2:30 pm | Group Breakout 2
<i>Goal: Redesigning U of I System Processes and IT Systems</i>
<i>Location: See Nametag, Table Number Assignment, and Map</i> |
| 2:40 pm – 3:00 pm | Open Discussion of Breakout 2
Wrap-up Presentation and Evaluation
Location: Chancellor Ballroom |

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IT Priorities Committee Planning Summit

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To find your assigned room, match the numbers on your nametag to the tables listed below.

Morning Breakout Table | Afternoon Breakout Table





2017 ITPC Planning Summit

UNIVERSITY OF ILLINOIS SYSTEM
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Welcome to the 2017 ITPC Planning Summit

Opening
Remarks

Michael Hites

Sr. Associate Vice President &
Chief Information Officer
University of Illinois System

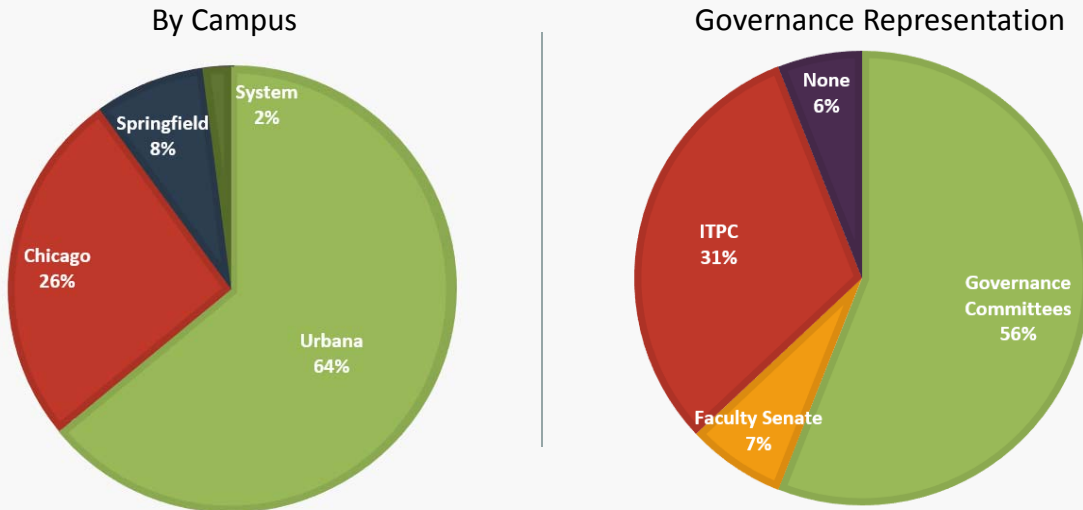


Goals for Today's Summit

To promote collaborative planning relative to administrative information technology initiatives and services.

Improve university business processes and systems to make things easier for students and faculty to be successful.

Today's Participants



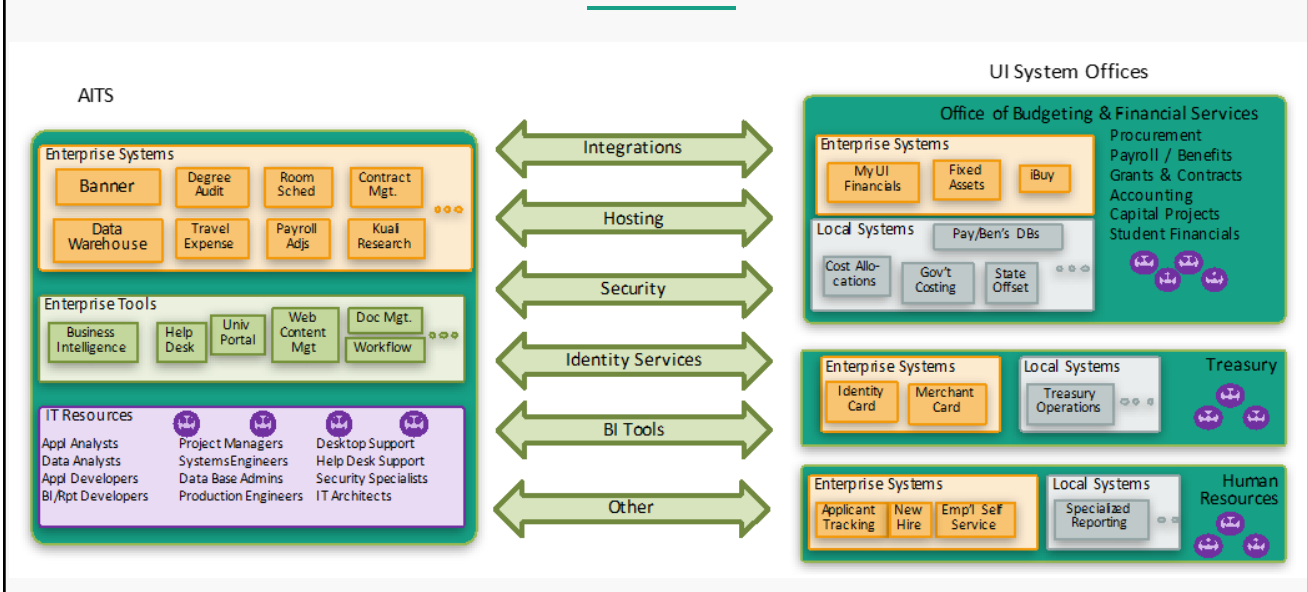
ITPC Overview

The Information Technology Priorities Committee (ITPC) process provides a common approach to solicit, review, prioritize and execute administrative information technology projects involving System Offices (SO) information technology resources.

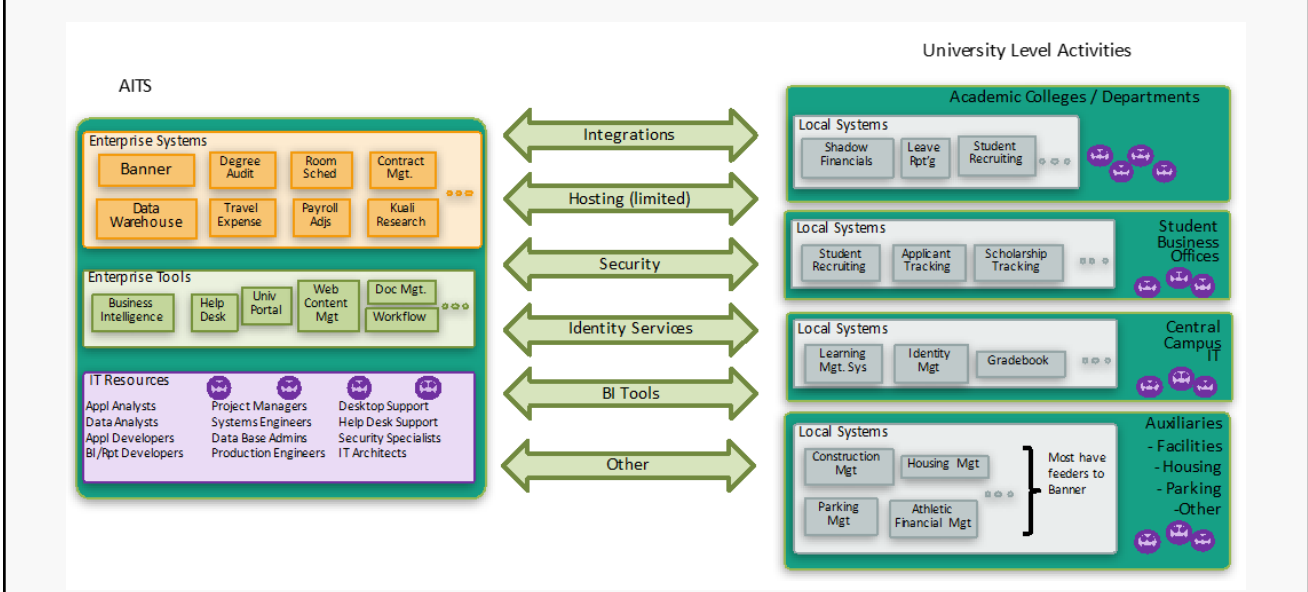
The University of Illinois information technology governance structures focus on these primary areas:

- design, implement, and manage a system of input and strategic decision-making
- create and maintain processes for investment and prioritization
- ensure collaborative design of services and infrastructure
- provide a mechanism for communication, reporting, and performance measurement

Enterprise Systems/Services Managed by UI System Offices

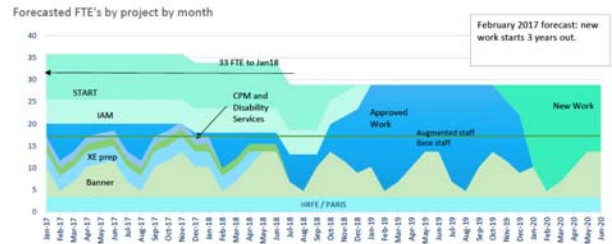
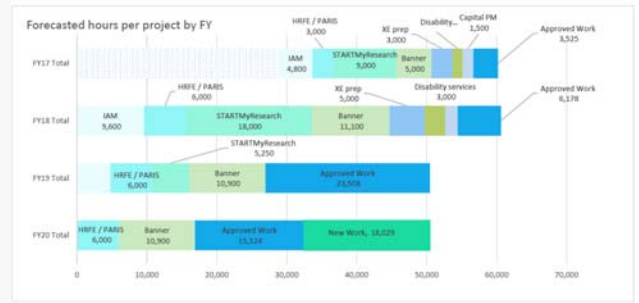


Enterprise Systems/Services Interaction with Local Systems



ITPC Supply and Demand

- Allocate ~\$1.1M and 65,000 IT hours per year
- Project queue is ~30 months deep
- Projects reprioritized on a rolling basis



Process Experience and Improvements

ITPC Experience to Date

- 548 projects reviewed
- 477 projects approved
- 72 projects rejected or withdrawn
- 425 projects completed
- 51 projects in progress or in queue
- ~\$28M cash
- ~\$60M labor

ITPC Improvements 2009

- Improving the alignment of project selection to strategic plans
- Improving cross-functional prioritization of projects
- Making adjustments to the review structure and committee membership
- Improving communication outside of the process
- Delegation of decision making for "small" projects
- Normal periodic process reviews

ITPC Improvements 2016

- Improve process to enhance/reward strategic alignment
- Utilize a social business software tool to improve collaboration and communication
- Improve summary level information for project evaluation
- Deemphasize review of mandatory projects
- Define process for projects with shared funding

Supporting System and University Strategies

August ITPC

ITPC Alignment to University of Illinois System Strategic Framework	
Strategy	Count of projects in current portfolio
Ensure our long-term financial sustainability	14
Build a System-wide culture of innovation, collaboration, entrepreneurship, and thoughtful risk-taking	0
Develop and invest in our human capital	3
Reimagine student-focused teaching and learning	1
Create a technology platform that touches every function of the modern university environment	7
Improve college readiness and outcomes by building strong vertical and horizontal connections with other educational institutions in IL	0
Grow and diversify experiential learning and career guidance	0
Enhance the diversity and inclusiveness of the University community	3
Promote engagement with alumni of the University of Illinois System worldwide	1
Increase the System's power as an engine for statewide and regional economic development	0
Create national models for professional training, affordability, access, and positive outcomes in healthcare	0
Promote strong civic engagement among students, faculty, staff, and residents of Illinois	0
Fully integrate global perspectives and international experience into our academic and co-curricular offerings	0
Strengthen opportunities for students to excel beyond the academic sphere	0
Identify a set of significant sociotechnical problems that the System is particularly well suited to solve	0
Highlight the centrality of the humanities and arts in the human experience	0
Become a model of environmental sustainability	0
Forge new research and development partnerships around the world	1
Ensure affordability, access, and completion, offering degrees that increase in value	1
Develop a University-state compact	1

Supporting System and University Strategies

November ITPC

Strategy	Percent
Improve operational efficiency and administrative productivity to support mission activities.	75%
Increase and diversify our funding streams.	63%
Develop information and tools that make the breadth of university information available to students.	63%
Develop a System-wide strength in data analytics.	50%
Develop online tools to automate progress tracking for students.	50%
Use IT to make university expertise more widely available to all constituents.	38%
Use social media and other contemporary technologies to improve community and alumni engagement.	38%
Enable opportunities for scholars and researchers to enhance global recognition and prominence.	25%
Continue the System's trailblazing legacy of accessibility for people with disabilities.	25%

Supporting System and University Strategies

February ITPC

February 2017	Assignment from December 2016: Propose strategic focus by reviewing the University of Illinois strategic plan, the UIC Resource Strategy Team Report, the UIC ITGC Admin business process recommendations, and the December 2016 ITPC discussion.	Proposed strategic focus: <ul style="list-style-type: none"> • Student progress tools • Data analytics • Design principles • Focus on blended (cloud and premise) or cloud implementations • Focus on reducing complexity of business processes
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Today

April 2017	Discuss at ITPC Summit	Present the following related questions at the ITPC summit for discussion: <ul style="list-style-type: none"> • <i>Collaborate on how improvements in areas such as document management, workflow, self-service, and data analytics can increase productivity and success for faculty, students and staff</i> • <i>The focus of this discussion is to describe the ideal characteristics of university business processes and administrative IT systems as well as identifying areas of improvement to consider for future IT and ERP Systems.</i> Summarize and follow up with social media campaign to encourage proposals that support these strategies.
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UIC Resource Strategy Team Report - 2016

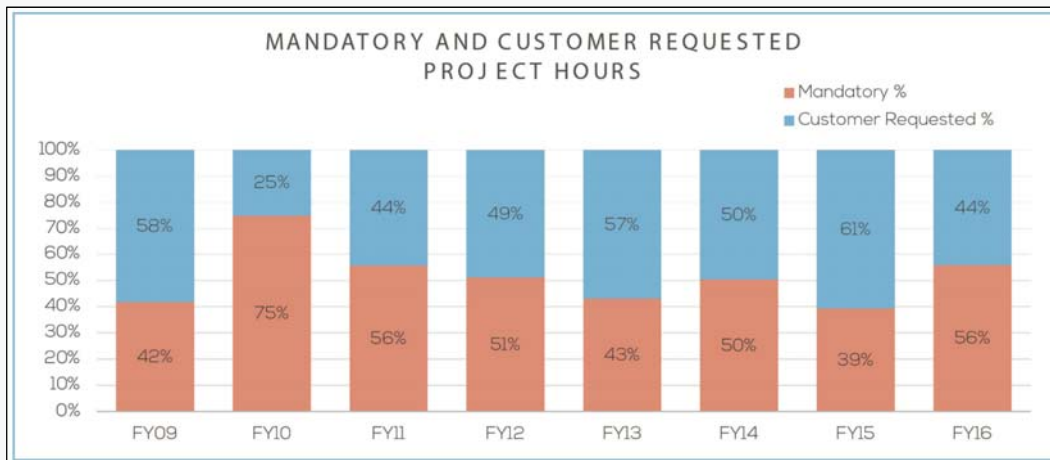
Recommendations:

- 7 Human Resources
- 12 Business Processes
- 16 Research Administration
- 6 Centers and Institutes
- 13 Strategic Resources

For Example:

HR 1 If current org structure is retained. Increase communication/coordination between all HR-type entities serving UIC. HR 2 Build a common portal for all HR info. HR 3 Examine HR structures and reporting. HR 4 Reduce HR policies and procedures to what's necessary. BP 6 Staff some Benefits, Payroll, and Payables positions from Chicago. BP 7 Convert to bi-weekly payroll cycle for efficiency. SR 6 CS Bumping Policy uncertainty/modification. Move to HR section. SR 8 Consolidate payroll schedules. Also see BP 7 SR 9 Evaluate and consolidate International Visa Processing for the campus in one office. SR 7 Reduce AP termination lead time.	HR 5 Foster open communication with State University Civil Service System. HR 6 Create pool of resources to fill/move T-contracts HR 7 Complete job analysis work in a consistent way across units.	
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Constraints When Pursuing Strategic Work



Enhancing Capabilities

- Workflow and Document Management
- Self Service
- Data Analytics

Topics for Today's Summit



Redesigning Processes and Systems

- Improving Processes
- Designing Better Systems
- Next-generation ERP Improvements



ENHANCING CAPABILITIES

BREAKOUT SESSION ONE

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Some HR and Finance Processes That Could Benefit from Improved Workflow & Document Management

Human Resources Processes

- Service in Excess Form
- Dual Career Hire Pre-Approval
- Summer Exception
- Leave Without Pay
- Lump Sum Payment
- Request for Civil Service Employees
- Proposal For Reappointment of a U of I Retiree



Finance Processes

- Mutual Nondisclosure Agreement
- Official Headquarters Designation Form
- Request for Travel Information
- Department Deposit
- Returned Check Handling
- Change Fund Amount
- Quarterly Petty Cash Fund Reconciliation
- Check Log

What do we do once we redesign the process?

High-level Process Overview/SIPOC



Suppliers	Inputs/Specifications	Process (see above)	Outputs/Requirements	Customers
<ul style="list-style-type: none"> Employee to be terminated. Employee's manager. HR (UA or campus). Unit Security Contact. AITS. Technology Services. 	<ul style="list-style-type: none"> Notice of termination. Access to applicable Enterprise systems. 		<ul style="list-style-type: none"> Revoked access. 	<ul style="list-style-type: none"> Units who "own" Enterprise resources. OBFS AITS UAFR/Accounting University of Illinois Auditors

Enabling Capabilities: Workflow and Document Management



A Workflow and Document Management System is used to create, route, store, and track electronic documents and information associated with business processes.

- Examples of systems include Hyland OnBase, Laserfiche, Xtender and Banner Document Management, FormBuilder, Quali Core, Ellucian Workflow and others
- Business Process examples would include Promotion and Tenure, Sabbatical Processing, and Employee Offboarding

Enabling Capabilities: Self Service



USERNAME AND PASSWORD SIMPLIFICATION

ITPC-0375 IAM (Urbana release)

Your NetID and password unlock services across the University.

Your NetID is a unique identifier assigned to you across all University of Illinois campuses. With your associated NetID password, it serves as your login to most University computing and networking services.

CHANGE PASSWORD

MODIFY RECOVERY
OPTIONS

I forgot my password
I forgot my NetID

RESEARCHER PORTAL

ITPC-0465 START myResearch
(PI Portal Release)

PERSONAL RESEARCH PORTFOLIO

Proposals	Agreements/Awards	Subagreements/Subawards
<ul style="list-style-type: none"> Central Office Review (3) Pending with Sponsor (3) 	<ul style="list-style-type: none"> Awarded (13) New Funded (13) 	<ul style="list-style-type: none"> Pending (3) Closed (3)

ADMINISTRATIVE RESEARCH PORTFOLIO

Proposals	Agreements/Awards	Subagreements/Subawards
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Enabling Capabilities: Self Service



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Find my IP Address

EASY ON-DEMAND ACCESS TO FINANCIALS

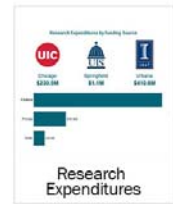
ITPC-0444 My UI Financials

Filter by: Fiscal Year: 2018 Fiscal Period: 12 - June

Class	College	Account	Dept.	Type of Fund	Fund ID Name	Act	Budget	Cur Month Exp	Expenses	Dr
9	200201	999008	999170	ITPC One-Time Reduce Project Queue	YTD	427,774.29	12,470.24	101,027.06		
9	200201	999008	999187	ITPC 0020 Banner Student Upgrade	YTD	0.00	0.00	41.19		
9	200201	999008	999185	ITPC 0013 Banner Financial Upgrade	YTD	42,871.26	0.00	62,871.06		
9	200201	999008	999183	ITPC 0010 WPE/PAGE FY18 Maint	YTD	0.00	33,696.27	105,794.04		
9	200201	999008	999178	ITPC 0020 Banner Student Upgrade	YTD	0.00	35.15	338,629.70		
9	200201	999008	999179	ITPC 0024 Student CRM	YTD	0.00	0.00	202,000.00		

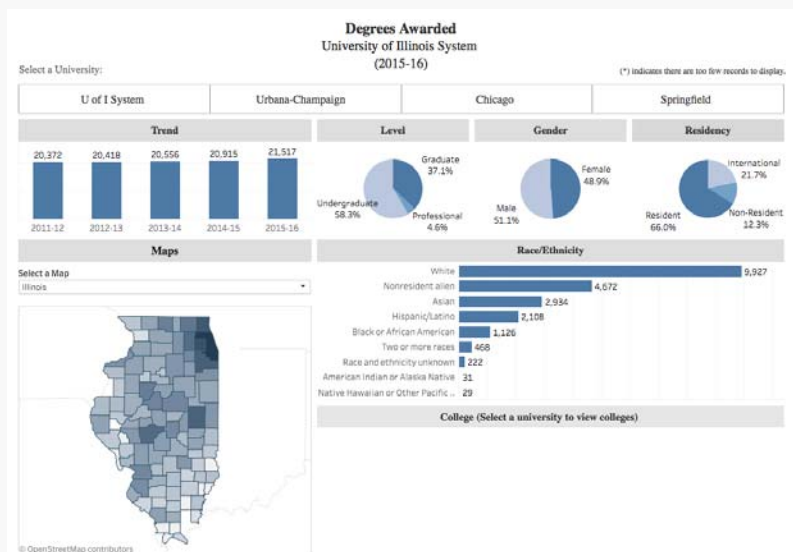
Enabling Capabilities: Analytics

- Improving Student Success
- Investment, Performance, and Accountability Compact



Enabling Capabilities: Analytics

- Improving Student Success
- Investment, Performance, and Accountability Compact



Breakout Session One Discussion Questions

Question 1

There is a need for improved workflow and document management capabilities for administrative processes. If enhanced capabilities and tools were available, how would you use them and how would your customers use them?

Question 2

What areas and processes could benefit from better or additional self-service opportunities?

Question 3

How do we improve the use of data analytics in serving students, faculty, and staff at the U of I System?

Breakout Session One - Logistics

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Loyalty	7, 8
Excellence	9, 10
Innovation	11, 12
Knowledge	13, 14
Lincoln	15, 16, 17, 18

Return to Chancellor Ballroom by 12:00pm

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2017 ITPC Planning Summit

First

Last

Title
College or Department
University

Breakout One
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Breakout Two
1



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Breakout Session One
Enhancing Capabilities

**OPEN
DISCUSSION**



LUNCH



12:15pm – 12:50pm
Chancellor Ballroom

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Dr. Barbara Wilson

Executive Vice President &
Vice President for Academic Affairs
University of Illinois System

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REDESIGNING ADMINISTRATIVE PROCESSES AND SYSTEMS

BREAKOUT SESSION TWO

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UIC Resource Strategy Team Report - 2016

Recommendations:

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SR 9	Evaluate and consolidate International Visa Processing for the campus in one office.		
SR 7	Reduce AP termination lead time.		

Redesigning Processes and Systems

- Banner is approaching 15 years old
- Other systems are due for next generation evaluation



Postmodern ERP strategy in development

- Is it cloud?
- Is it Banner or another system(s)?
- Business Process review should front-end any changes
- Where do we go in the next 2-4 years?

Figure 2. The Evolution of ERP

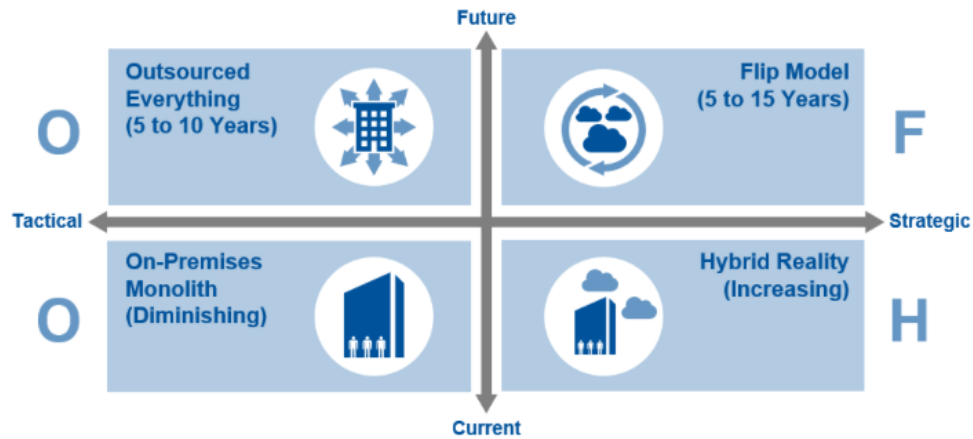
	Best of Breed	Traditional ERP	Postmodern ERP
Strategy	Tactical purchasing of "best" solutions by function	Strategy = Vendor ERP = Suite of suites	Business-driven and owned: Core ERP and specialized add-on solutions
Architecture	Fragmented	Monolithic	Holistic and integrated
Plans	Slow to respond	Silo-based	Life cycle based on business capabilities
Integration	Complex, point to point	Tight, but within the ERP solution	Federated, loosely coupled and "differentiated" connecting technology
Orientation	Function	Data	End-to-end value chains
Governance	Fragmented	Controlling — single speed	Balanced: Tailored to pace of business change

Source: Gartner (December 2016)

Redesigning Processes and Systems

Redesigning Processes and Systems

Figure 1. Postmodern ERP Hybrid, On-Premises, Outsourced and Flip (HOOF) Model




Source: Gartner (October 2016)

Business Process Design




- As simple as possible?
- As similar as possible?
- Value in complexity?
- Eliminating steps
- Eliminating layers
- Improving customer experience

Systems Designed Arounds Functions and Departments or Users?

Student Interactions with University Information Technology				
Use Learning Management Systems	Accept Offer of Admission		View and Request Advisor Information	Personalized Dashboards
Check Admission Status	Access Course Content		View and Request a Transcript (Academic History)	Review and Pay Tuition, Fees and other Bills
Online Collaboration	Send Standardized Test Scores		Fill out an Admissions Application	Email
Manage Housing and Meals	E-textbooks		Progress Alerts	Campus Maps
Use Campus-wide Wi-Fi	Social Media as a Learning Tool		Access Campus Portal	Career Center
Apply for University Housing and Dining	View and Request a Degree Audit report		Finalize New Student Items (Examples: Health Insurance, Identity Card)	Submit Thesis and other Graduation Documents
Register for Campus Events	Search Tools		Change and Maintain Bio/Demo Information	Success Analytics
Foundation and Alumni Association Interaction	View Midterm/Final Grades		Register for Classes	Competency-based Education
Apply for Graduation and Finalize Diploma Information	Purchase Athletic Tickets		E-portfolios	'What If' Program Research and Advisement
Use Mobile Device as Identification	Fill out Employment Information for a Campus Job		Access Financial Aid Award Letter; Accept and Check on Financial Aid	Fill out Electronic Direct Deposit for Campus Job
Fill out Timesheet for Campus Job	Utilizing Laptops/Tablets/Mobile in the Classroom		Access Library Resources	Register as a Prospective Student (Recruit)
Change Academic Major	Accessing Recorded Lectures		Search for Classes in Course Catalog	Coursework Completion

Systems Designed Arounds Functions and Departments or Users?

Faculty/Employee Interactions with Administrative Business Processes			
Separate/Retire from the University	Apply for a Job	New Employee Processing	
Tuition Waivers		Job/Compensation Information	
Maintain personal information		Time Reporting	
Benefits		Taxes	
Dependent Information		Payroll	
Vacation / Sick Leave Management		Expense Reimbursement	
Performance Management		Travel Management	
Career Development		Purchases (pcard)	
Reporting		Manage employees / students	
Manage research grants		Faculty Grading	
Manage classes		Financial Management	Student Advising

Breakout Session Two Discussion Questions

Question 1

Consider the multitude of business processes that you interact with on an ongoing basis. Think of a specific one that you know needs improvement. How would you improve it?

Question 2

What are the ideal design characteristics for the systems that implement these business processes?

Question 3

Given your experience with the totality of university administrative IT systems, what would be areas of improvement for next-generation ERP systems (Banner)?

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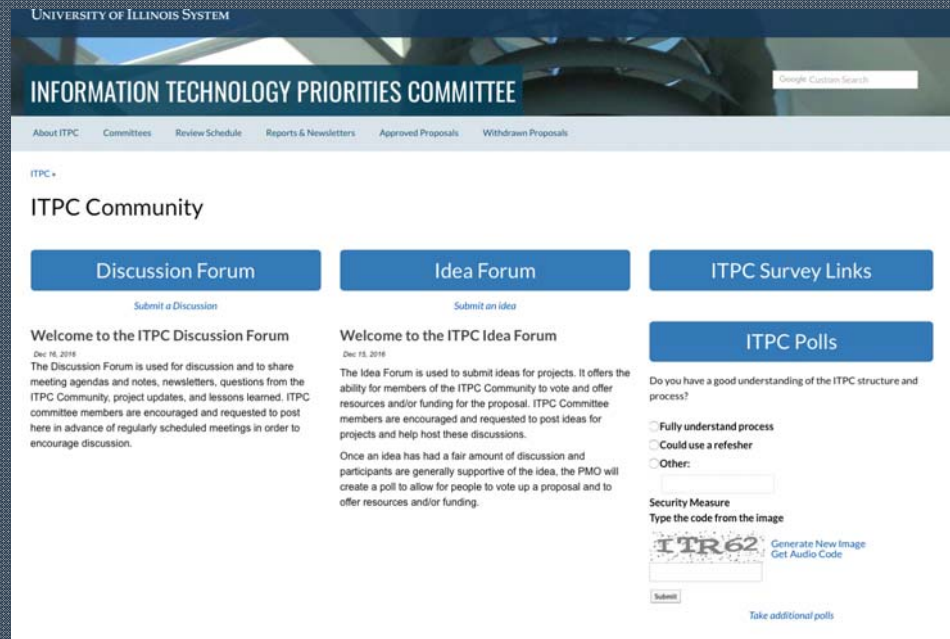
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Breakout Session Two
Redesigning Administrative Processes and Systems

OPEN DISCUSSION

Wrap-up

- Today's work will be summarized and shared
- Ongoing communication on progress



Wrap-up

- Evaluations are located on your tables
- Your feedback will help us make improvements for subsequent events
- Future events?



Thank You for your valuable contributions to today's Summit!!

2017 ITPC Planning Summit

Group Breakout 1

The Role of a Scribe

A scribe:

- Captures and records the proceedings of the breakout sessions to assure the group can accomplish their goals.
 - Documents what is discussed during the workgroup sessions.
 - Helps the group create lists of important points.
 - Summarizes the issues from time to time as to ensure they are documented correctly.
 - Documents all issues, ideas, solutions, and resolutions provided by the workgroup.
-

- 1. There is a need for improved workflow and document management capabilities for administrative processes. If enhanced capabilities and tools were available, how would you use them and how would your customers use them?**

- 2. What areas and processes could benefit from better or additional self-service opportunities?**

3. How do we improve the use of data analytics in serving students, faculty, and staff at the U of I System?

2017 ITPC Planning Summit Scribe Sheet

Group Breakout 2

The Role of a Scribe

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1. **Consider the multitude of business processes that you interact with on an ongoing basis. Think of a specific one that you know needs improvement. How would you improve it?**

2. **What are the ideal design characteristics for the systems that implement these business processes?**

3. **Given your experience with the totality of university administrative IT systems, what would be areas of improvement for next-generation ERP systems (Banner)?**

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Resource Links

University of Illinois System Strategic Framework:

https://www.uillinois.edu/strategic_framework

The UIC Resource Strategy Team:

<https://strategicpriorities.uic.edu/resource-strategy/>

University of Illinois at Chicago Strategic Priorities:

<http://strategicpriorities.uic.edu/>

University of Illinois at Springfield Strategic Plan:

<http://www.uis.edu/strategicplan/>

University of Illinois at Urbana-Champaign Strategic Plan:

<http://strategicplan.illinois.edu/>

Information Technology Priorities Committee:

<https://www.itpc.uillinois.edu/>

