



2017 ITPC Planning Summit

UNIVERSITY OF ILLINOIS SYSTEM

URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

Welcome to the 2017 ITPC Planning Summit

Opening Remarks

Michael Hites

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



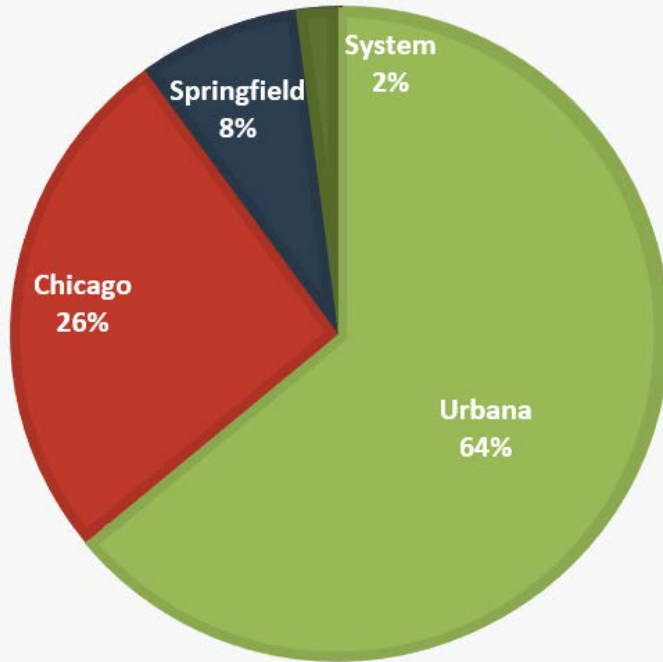
Goals for Today's Summit

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

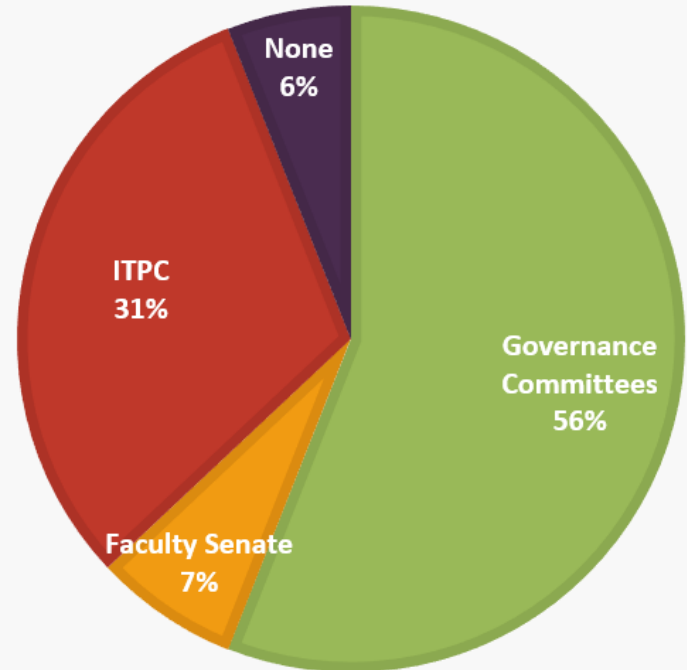
Improve university
business processes and
systems to make things
easier for students and
faculty to be successful.

Today's Participants

By Campus



Governance Representation



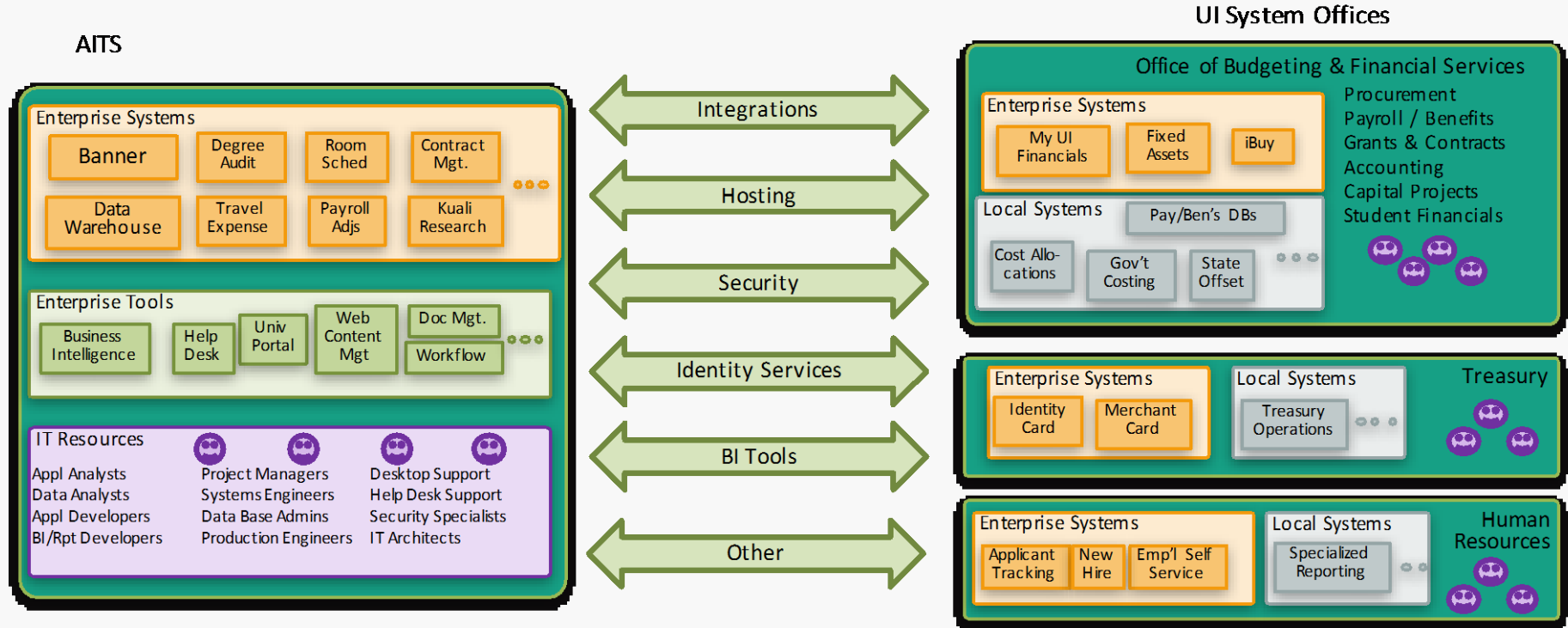
ITPC Overview

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.

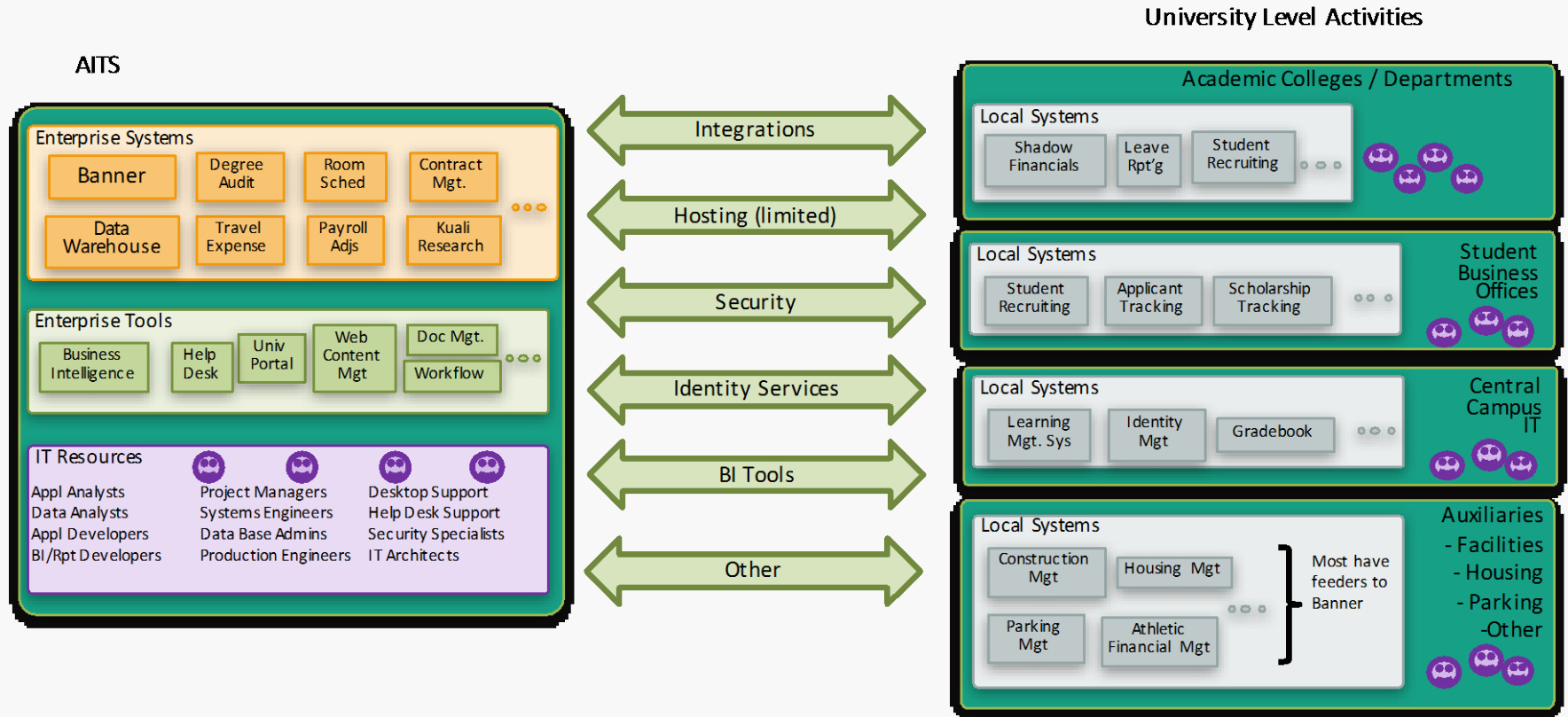
The University of Illinois information technology governance structures focus on these primary areas:

- 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



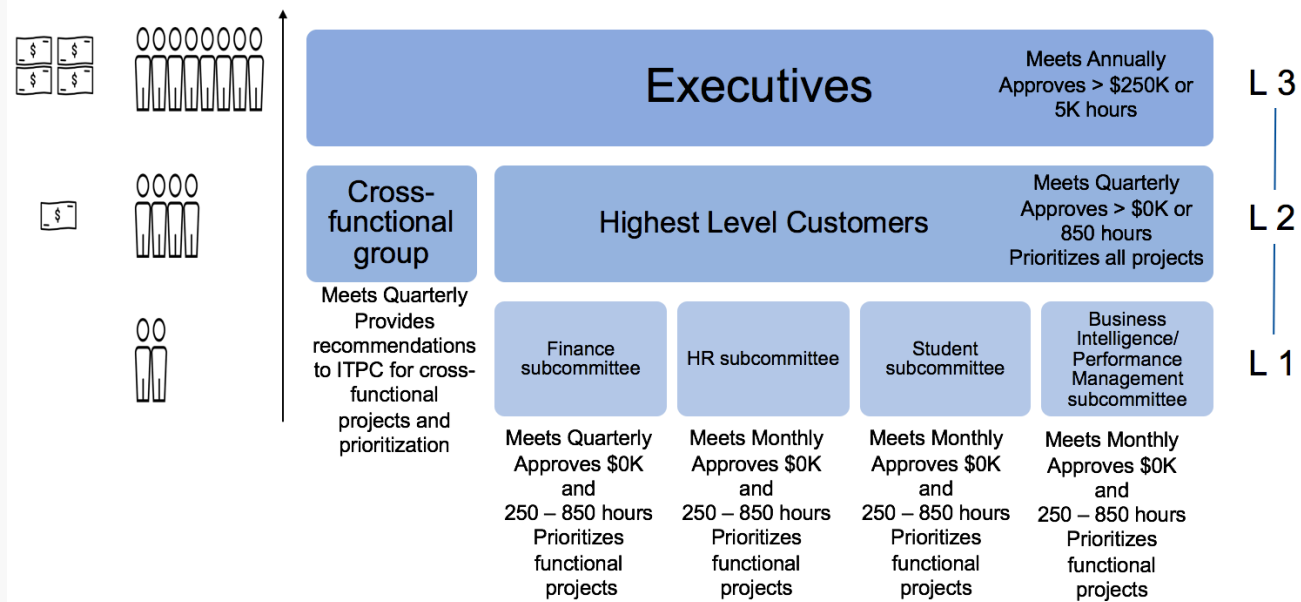
Enterprise Systems/Services Interaction with Local Systems



ITPC Structure

ITPC is a decade old customer-driven governance process to select and prioritize IT project work.

Allocates
~\$1.1M
project
funding
and 65,000
IT hours
per year



Flexibility of Governance Process

Simple > > > > > > > > > > > > > > *Complex*

Level 1 project

UIUC Winter term creation

Review steps:

- L1 Project proposal completed
- Review at functional subcommittee

Level 2 project

Automated Grade Change Process

Review steps:

- L2 Project proposal completed
- Review at functional subcommittee
- *Reviewed at cross-functional and main ITG Group*

Level 3 project

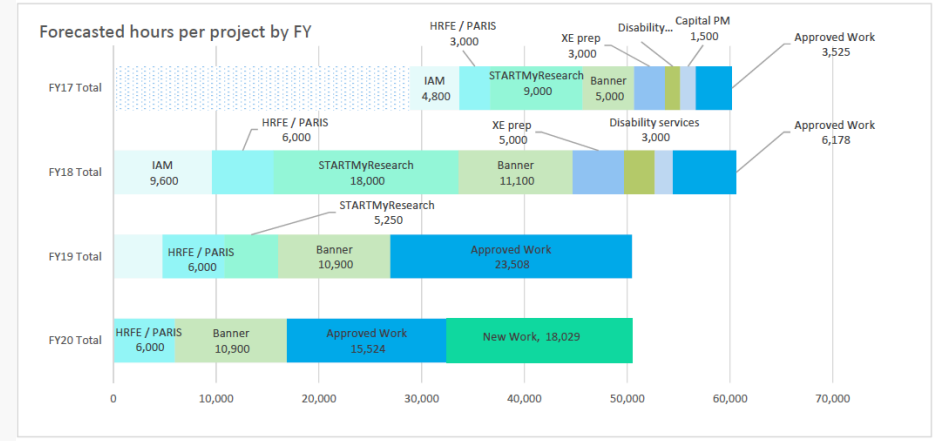
Identity and Access Management

Review steps:

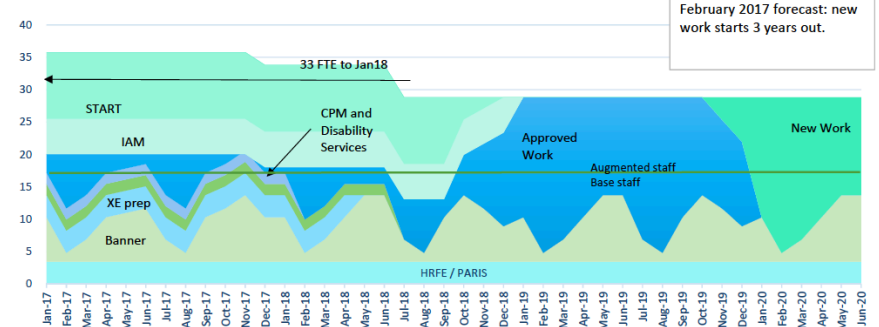
- L3 Project proposal completed
- Review at functional subcommittee
- Reviewed at cross-functional and main ITG Group
- *Executive Review*

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



Forecasted FTE's by project by month



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
---------------	---	--

Today

April 2017	Discuss at ITPC Summit	<p>Present the following related questions at the ITPC summit for discussion:</p> <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> <p>Summarize and follow up with social media campaign to encourage proposals that support these strategies.</p>
------------	------------------------	--

UIC Resource Strategy Team Report - 2016

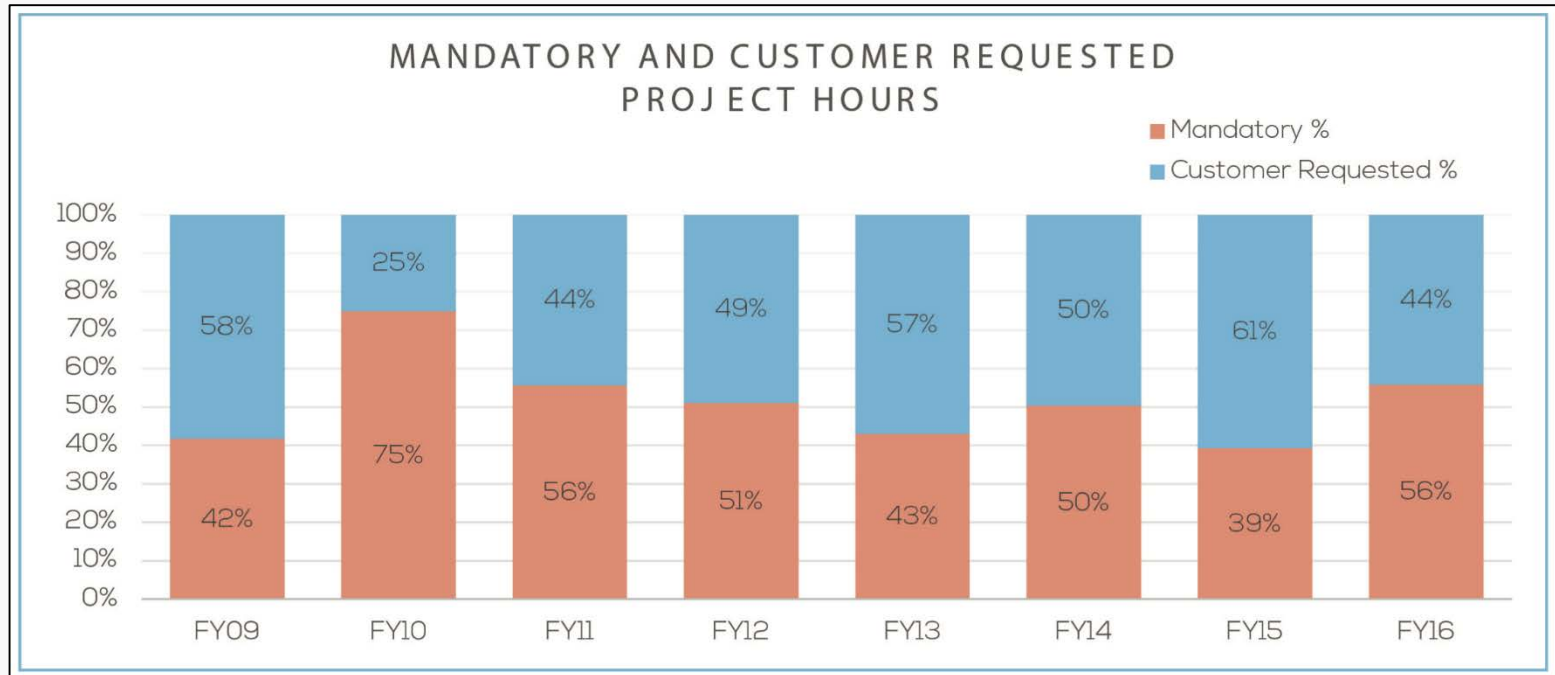
Recommendations:

- 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 5	Foster open communication with State University Civil Service System.
HR 2	Build a common portal for all HR info.	HR 6	Create pool of resources to fill/move T-contracts
HR 3	Examine HR structures and reporting.	HR 7	Complete job analysis work in a consistent way across units.
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.		

Constraints When Pursuing Strategic Work



Enhancing Capabilities

Topics for Today's Summit

Redesigning Processes and Systems

Workflow and
Document
Management

Self Service

Data Analytics

Improving
Processes

Designing Better
Systems

Next-generation
ERP
Improvements





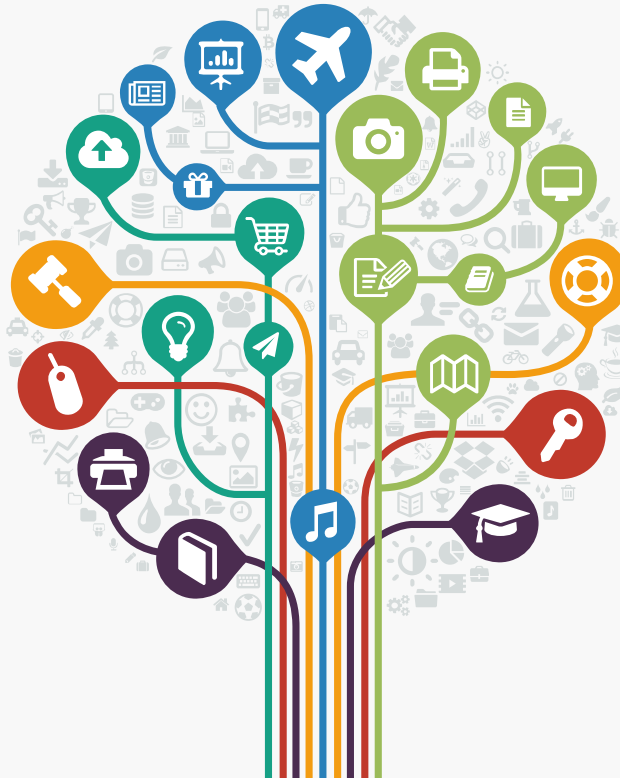
ENHANCING CAPABILITIES

BREAKOUT SESSION ONE

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

Download Your Cu

Proposals

Central Office Review (0)
Pending with Sponsor (0)

Awarded (63)
Non-Funded (43)

Agreements/Awards

Pending (0)
Closed (37)

Active (17)

Subagreements/Subawards

Pending (0)
Closed (38)

Active (3)

All

People v

ADMINISTRATIVE RESEARCH PORTFOLIO

Proposals

Central Office Review (0)
Pending with Sponsor (3)

Awarded (46)
Non-Funded (39)

Agreements/Awards

Pending (0)
Closed (33)

Active (2)

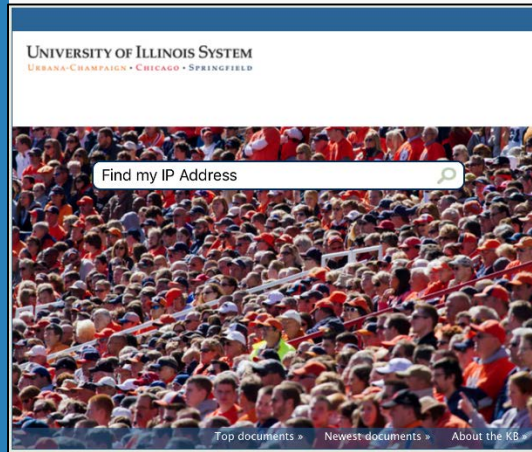
Subagreements/Subawards

Pending (0)
Closed (32)

Active (0)

All

Enabling Capabilities: Self Service



EASY ON-DEMAND ACCESS TO FINANCIALS

ITPC-0444 My UI Financials

Filter by: Fiscal Year: 2016 Fiscal Period: 12 - June

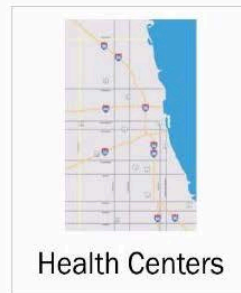
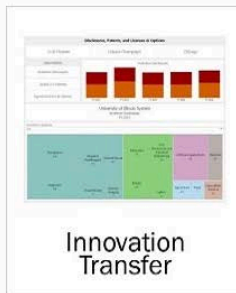
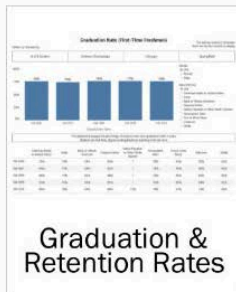
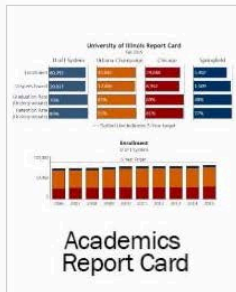
Chart: 9 - Admin College: AE - Chief Inform School: AEO - Chief Inform Dept: 699 - Admin Info Type of Fund: ICR & Other Instit Fund FI Name: All Get Records Clear Row

Show 100 entries

CoA	Fund Cd	Orgn Cd	Prog Cd	Title	Ind	Budget	Cur Month Exp	Expenses
9	200201	699008	699170	ITPC-One-Time Reduce Project Queue	YTD	437,774.39	12,470.24	101,027.06
9	200201	699008	699187	ITPC-0520 Banner Student Upgrade	YTD	0.00	0.00	41.19
9	200201	699008	699185	ITPC-0513 Banner Finance Upgrade	YTD	62,971.06	0.00	62,971.06
9	200201	699008	699183	ITPC-0510 HRFE/PARIS FY16 Maint	YTD	0.00	53,696.27	105,196.04
9	200201	699008	699178	ITPC-0505 Banner Student Upgrade	YTD	0.00	20.15	338,629.70
9	200201	699008	699179	ITPC-0504 Student CRM	YTD	0.00	0.00	202,500.00

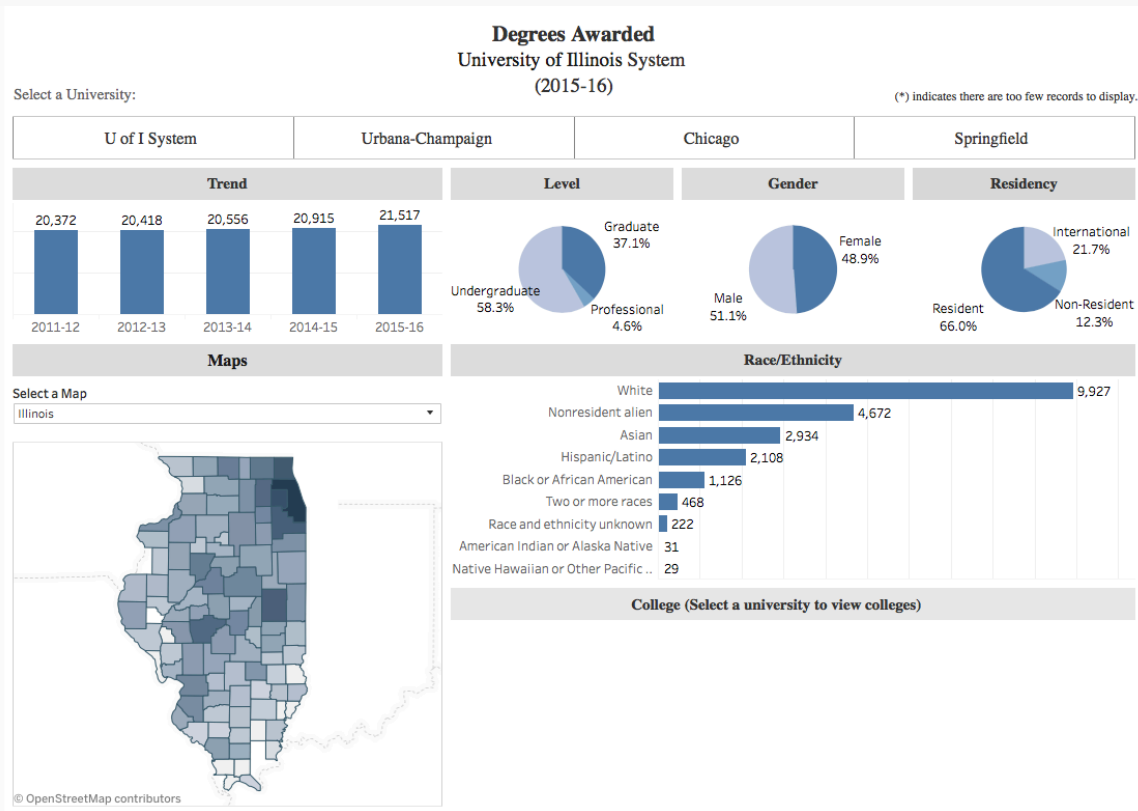
Enabling Capabilities: Analytics

- 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

Please match the table numbers on your nametag to the information on the map in your packet to identify which room and table you will be seated at for the group breakout discussion.

Room	Table Numbers
Technology	1, 2, 3
Quad	4, 5, 6
Loyalty	7, 8
Excellence	9, 10
Innovation	11, 12
Knowledge	13, 14
Lincoln	15, 16, 17, 18

Return to Chancellor Ballroom by 12:00pm

UNIVERSITY OF ILLINOIS SYSTEM
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

2017 ITPC Planning Summit

First

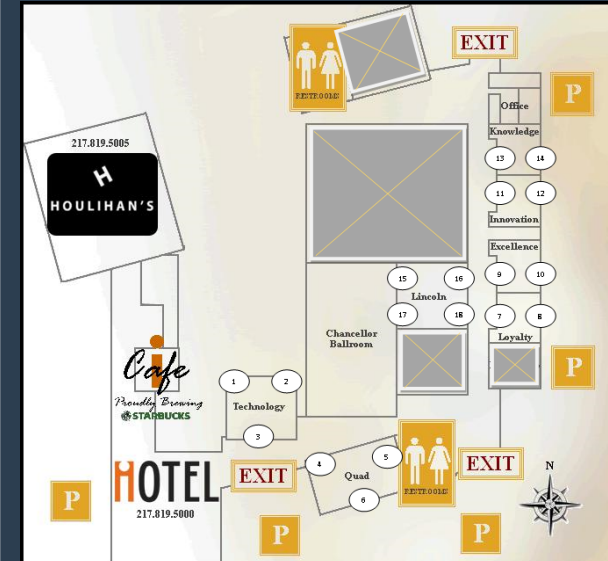
Last

Title

*College or Department
University*

Breakout One
1

Breakout Two
1



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?

Your group does not have to finish all the questions nor do you have to start at the first question.



Breakout Session One

Enhancing Capabilities

OPEN DISCUSSION

Breakout Session One

Open Discussion



LUNCH



12:15pm – 12:50pm
Chancellor Ballroom



Dr. Barbara Wilson

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



REDESIGNING ADMINISTRATIVE PROCESSES AND SYSTEMS

BREAKOUT SESSION TWO

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 5	Foster open communication with State University Civil Service System.
HR 2	Build a common portal for all HR info.	HR 6	Create pool of resources to fill/move T-contracts
HR 3	Examine HR structures and reporting.	HR 7	Complete job analysis work in a consistent way across units.
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.		

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

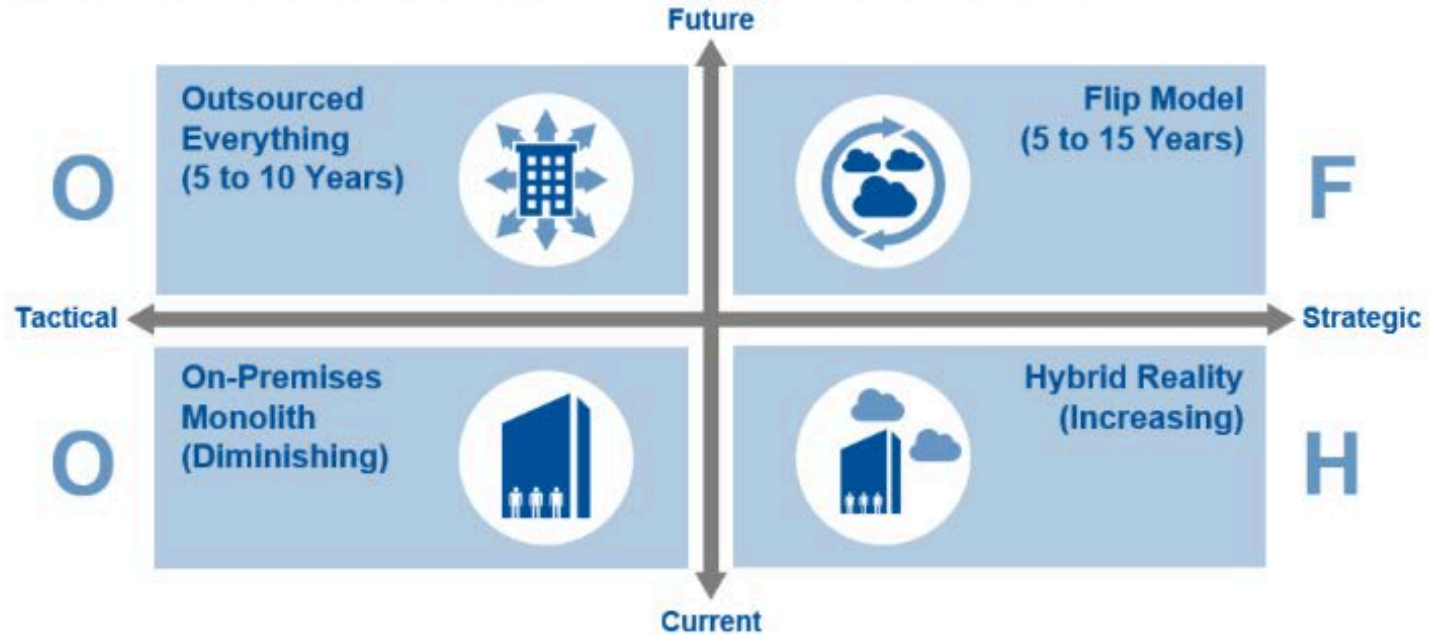
	Best of Breed	Traditional ERP	Postmodern ERP
			
Strategy	Tactical purchasing of "best" solutions by function	Strategy = Vendor ERP = Suite of suites	Business-driven and owned: Core ERP and specialized add-on solutions
Architecture	Fragmented	Monolithic	Holistic and integrated
Plans	Slow to respond	Silo-based	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)


A dense, circular arrangement of numerous small, colorful icons. The icons represent a wide variety of concepts including technology (cloud, laptop, smartphone, camera), business (briefcase, bar chart, pie chart, handshake), nature (leaf, sun, water drop), sports (soccer ball, trophy), travel (airplane, suitcase), education (graduation cap), and everyday objects (cup of coffee, key). The icons are in various colors like blue, green, orange, red, and grey, creating a vibrant and comprehensive visual vocabulary.

- 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)?

Breakout Session Two - Logistics

Please match the table numbers on your nametag to the information on the map in your packet to identify which room and table you will be seated at for the group breakout discussion.

Room	Table Numbers
Technology	1, 2, 3
Quad	4, 5, 6
Loyalty	7, 8
Excellence	9, 10
Innovation	11, 12
Knowledge	13, 14
Lincoln	15, 16, 17, 18

Return to Chancellor Ballroom by 2:40pm

UNIVERSITY OF ILLINOIS SYSTEM
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

2017 ITPC Planning Summit

First

Last

Title

*College or Department
University*

Breakout One
1

Breakout Two
1



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)?

Your group does not have to finish all the questions nor do you have to start at the first question.



Breakout Session Two

*Redesigning Administrative
Processes and Systems*

OPEN
DISCUSSION

Breakout Session Two

Open Discussion

Wrap-up

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

UNIVERSITY OF ILLINOIS SYSTEM

INFORMATION TECHNOLOGY PRIORITIES COMMITTEE

Google Custom Search

About ITPC Committees Review Schedule Reports & Newsletters Approved Proposals Withdrawn Proposals

ITPC »

ITPC Community

Discussion Forum

[Submit a Discussion](#)

Welcome to the ITPC Discussion Forum

Dec 16, 2016

The Discussion Forum is used for discussion and to share meeting agendas and notes, newsletters, questions from the ITPC Community, project updates, and lessons learned. ITPC committee members are encouraged and requested to post here in advance of regularly scheduled meetings in order to encourage discussion.

Idea Forum

[Submit an idea](#)

Welcome to the ITPC Idea Forum

Dec 15, 2016

The Idea Forum is used to submit ideas for projects. It offers the ability for members of the ITPC Community to vote and offer resources and/or funding for the proposal. ITPC Committee members are encouraged and requested to post ideas for projects and help host these discussions.

Once an idea has had a fair amount of discussion and participants are generally supportive of the idea, the PMO will create a poll to allow for people to vote up a proposal and to offer resources and/or funding.

ITPC Survey Links

ITPC Polls

Do you have a good understanding of the ITPC structure and process?


☐ Fully understand process

☐ Could use a refresher

☐ Other:

Security Measure

Type the code from the image



[Generate New Image](#)
[Get Audio Code](#)

[Take additional polls](#)

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!!