



ITPC

Information Technology
Priorities Committee

UNIVERSITY OF ILLINOIS SYSTEM
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

**Fiscal
Year
2018
Annual
Report**

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About ITPC

The Information Technology Priorities Committee (ITPC) provides the processes that allow IT consumers to solicit, review and prioritize the work of administrative information technology resources. This annual report takes a look at ITPC in FY18 and looks ahead to FY19.

ITPC defines the processes, components, structures, and participants for making decisions regarding the use of IT. It collects ideas, reviews and selects, and prioritizes resources in the most strategic manner possible. It promotes transparency, strategic alignment of the university and IT, resource allocation, performance management, collaboration, standards and policy, and it encourages constituents to participate actively in the process.

ITPC covers administrative IT projects that:

- involve resources from a University System Office unit;
- involve campus based units that plan to offer an administrative system for the entire campus;
- interface with an enterprise system, or;
- seek funding from the central pool of administrative information technology dollars allocated by the Academic Affairs Planning Council.

Within the ITPC process are six committees formed to review, approve and prioritize projects. Those bodies are the ITPC (central committee), ITPC Cross-functional group and four functional subcommittees: Finance, Human Resources, Student and Business Intelligence/Performance Management which feed proposals and prioritization information to the central committee.



Tony Kerber, Jannah Coon, Robyn Velazquez and AJ Lavender are reviewing the design of an ITPC project.

ITPC Focus on Results

FY17 saw the release of the UI System Strategic Framework. ITPC members used this as an opportunity to assess the current project portfolio and set the strategic direction for the next 2–3 years. In FY18, ITPC turned its attention to improving our risk management practices and ensuring all projects are meeting current System needs.

Focus on mitigating risks

FY18, ITPC project managers implemented more rigorous risk identification and management practices. This included the creation of risk management toolkits, training for all ITPC project managers, and monthly reporting and reviews. Monthly portfolio level reviews occur within the project management group as well as at the AITS management level. This allows for early corrective action, collaborative problem solving, and helps reduce repeated issues.

Ensuring current System needs are met

Proposals for ITPC projects include a thorough assessment of the project's ability to meet the System's needs. In FY18, ITPC made process changes to make the review of this information easier and to ensure that all projects in the queue, in progress, or on hold are still relevant.

- Through a new summary page and rating system, the ITPC committees are able to easily assess the benefits a project will provide to the University System before the project is approved.
- In progress and recently completed projects are presented by a member of the team at a quarterly meeting. This gives the committee members an opportunity to provide guidance, identify collaboration opportunities, and ensure that the project is still expected to meet the System's needs.
- ITPC introduced a new policy requiring a review of projects that are in queue or have been put on hold for a period of time. This helps ensure that these projects are still relevant and needed.

Members

CHAIR: **Kelly Block**, Interim Associate Vice President for AITS

Clarice Ford, Interim Vice Chancellor for Student Affairs, UIS

Tulio Llosa, Associate Provost for Information Technology and CIO, UIS

Cynthia Herrera Lindstrom, CIO, ACCC, UIC

Dimuthu Tilakaratne, Assistant Vice President of Decision Support, AITS, System Office

Ilir Zenku, AVP Health Information Services, UIC

Todd Van Neck, IT Governance Council—Administration (Chair), UIC

Jan Novakofski, Associate Vice Chancellor for Research for Compliance & Professor, Animal Sciences, UIUC

Kevin Browne, Vice Provost for Academic and Enrollment Services, UIC

Kristi Kuntz, Associate Provost for Academic Programs and Policies, UIUC

Kristy Kuzmuk, Senior Director of Operations VPR, System Office

Laurel Newman, Director of Online Programs, College of Business and Management, UIS

Mark Henderson, CIO Urbana Campus, UIUC

Jami Painter, Assistant Vice President for Human Resources, System Office

Michael Bass, Senior Associate Vice President, Office of Business and Financial Services, System Office

Sarah Zehr, Assistant Vice President for Academic Affairs, System Office

Anne Craig, Senior Director, Consortium of Academic and Research Libraries in Illinois (CARLI)

Wendy Petruzzello, Director of Business Information / Interim CIO, Alumni Association

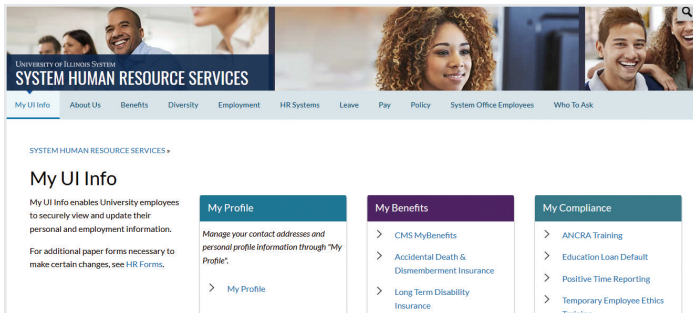
Kirsten Cordova, Director for Information Governance, University of Illinois Foundation

Sandy Street, Senior Director, Interim Assistant Vice President Planning and Budgeting

Vacant, UIC Faculty Representative

Vacant, UIUC Faculty Representative

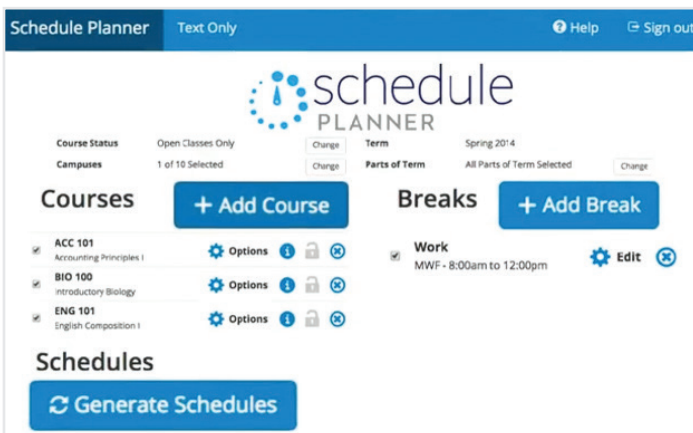
Highlights of Projects



NESSIE/UHR REDESIGN AND CONSOLIDATION

- Provides increased simplicity and functionality for employees to manage earnings and benefits.
- Improved design will reduce maintenance and user support requests.
- Went live in phases and the final phase went live May 15th.

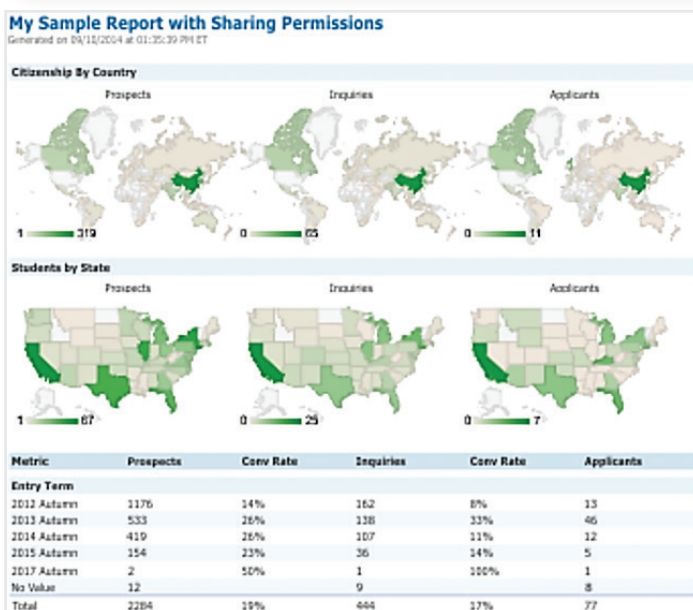
IMPACT: Estimated 208 hours/year total in end user savings for the 1.5 M annual current visits



COLLEGE SCHEDULER

- Allows students to generate schedules, viewable as side-by-side calendars, with designated time blocks for life activities. The student can then select and register for their optimal schedule.
- UIUC implemented February 2018 and UIC July 2017.

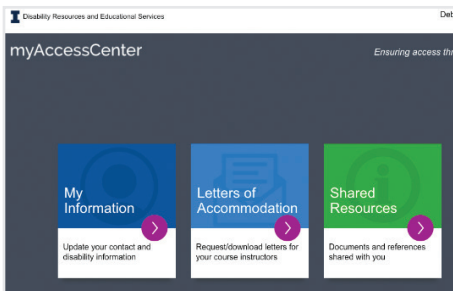
IMPACT: Expected to reduce student registration time in orientation by 1.5 to 2h



STUDENT CRM IMPLEMENTATION

- A Customer Relationship Management (CRM) system for all three University of Illinois universities.
- Assists in recruiting, securing and retaining students.
- Project was completed in FY17.

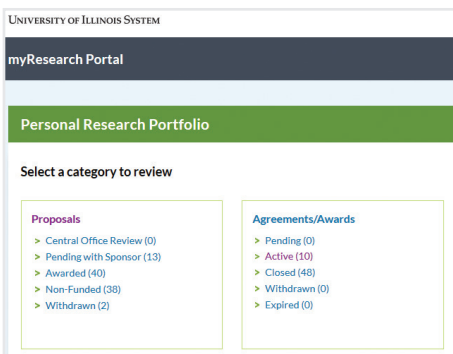
IMPACTS: \$165,000 direct cost savings per year



MYACCESSCENTER

- Helps to improve the academic performance and success of registered students with disabilities.
- Provides a method for students to request services and the ability for staff to manage and provide accommodations.
- Targeting Fall 2018 for UIUC and UIS.

IMPACTS: Approximately 1,600 students and staff on 2 universities will use this system



MYRESEARCH PORTAL

- Displays a variety of sponsored research information in a clean, user-friendly interface that allows faculty and business managers to easily view or download data to aid in their grant management activities.
- Currently live and enhancement targeted for Fall 2018.

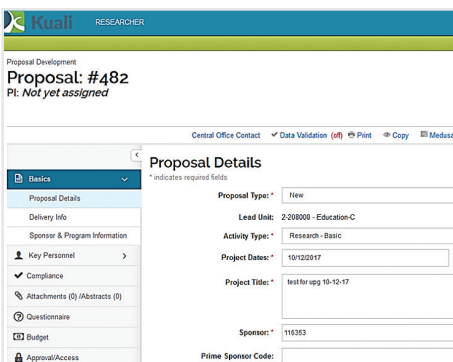
IMPACTS: Per month, 600 people use the system



EMPLOYEE TRAINING INFRASTRUCTURE

- System to develop, deliver, and track training, including Ethics, HIPAA, Human Subjects, etc.
- Faculty will have an easy way to ensure staff have completed required compliance training for their research.
- Will be used for Ethics Training in Fall 2018 and then will be released for other compliance training.

IMPACT: The University is subject to 250 federal compliance requirements.



KUALI MYPROPOSALS

- Provides investigators and business managers the ability to electronically submit sponsored proposals for central office review and route them electronically for approvals.
- Targeted to deploy Fall 2018.

IMPACTS: Streamline and modernize the proposal submission and approval process, ultimately making the overall proposal submission process more effective

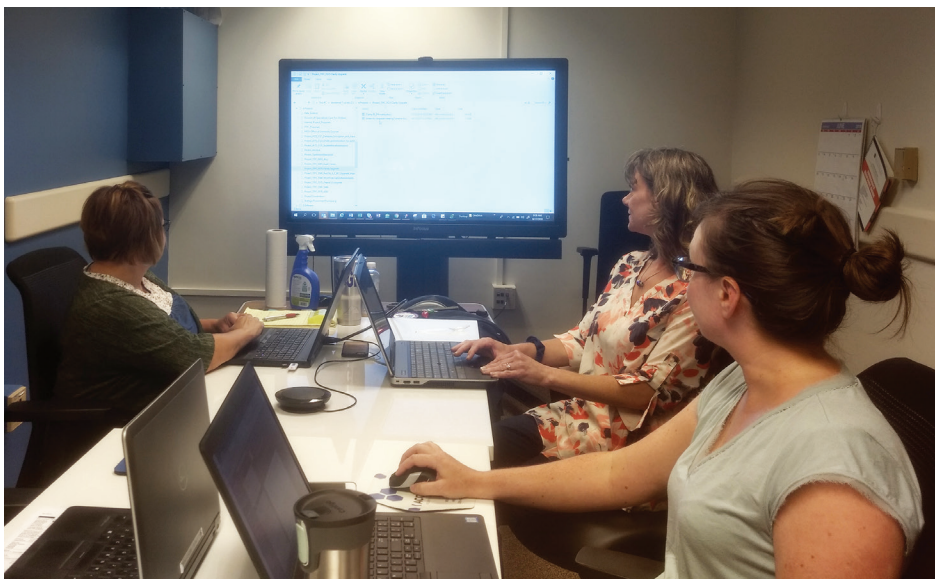
Mandatory Work



Pete Bossert is an analyst on Student focused ITPC projects.

A number of ITPC projects are completed each year to maintain enterprise services at the most current versions. Annual updates reduce support costs and provide the latest functionality to users. In addition, regular, smaller updates minimize the disruption and the costs associated with less frequent, consolidated updates. Maintenance, upgrades, and work required by new or changing regulations and laws are unavoidable and therefore considered mandatory by ITPC. ITPC FY18 mandatory work included a number of upgrades and a project to accommodate Senate Bill 42.

Annual updates reduce support cost and provide the latest functionality to users



Tanya Williamson, Tara Sadler and Ashley Hallock are discussing a BI solution for a customer.

- Business Objects Upgrade to 4.2 (**STATUS:** *In Progress*)
- Oracle Upgrade (**STATUS:** *In Progress*)
- ApplicationXtender 8.1 Upgrade to maintain system for document and image management (**STATUS:** *In Progress*)
- CA Service Desk Manager(SDM) 17.1 Upgrade to take advantage of improvements to the ticketing system (**STATUS:** *In Progress*)
- DARwin Upgrade to u.achieve (**STATUS:** *Complete*)
- ViewDirect(MobiusView) Upgrade to maintain our report display and storage (**STATUS:** *Complete*)
- Envisions/Intellectcheck upgrade to maintain check printing and report reformatting (**STATUS:** *Complete*)
- Clarity upgrade to maintain and improve our project tracking system (**STATUS:** *Complete*)
- Implement Senate Bill 42 (Earnings over Governor's Salary (**STATUS:** *In Progress*))
- Regular Banner 8 maintenance (**STATUS:** *Ongoing*)

Preparing for the Future

Automating business processes

Over the past 5 years, AITS has seen a 130% increase in work requests to automate business processes and create custom electronic business workflows. In addition, ITPC stakeholders discussed enhancements needed for the existing enterprise workflow and automation tools available to them.

ITPC-0545 was approved to review and analyze the market sector of enterprise workflow and automation tools. In addition, the team held focus groups to gather requirements and presented at multiple venues including UIC's ITGC committees and UIUC's IT Alliance. At the end of FY18, the project team had narrowed the search to several viable options and is evaluating each of them to see which would best fit the needs of the University System.

The suite of tools that provide enterprise workflow and automation is called an intelligent Business Process Management Suite (iBPMS). With this solution, a citizen developer at college will be able create an app that is integrated with other enterprise systems and data in a short period of time with little or no assistance from central IT.

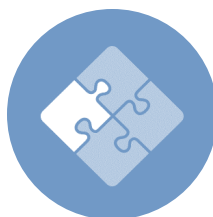
Overall, the University of Illinois System has hundreds of processes that could be streamlined with workflow and automation

An enterprise level iBPMS would:



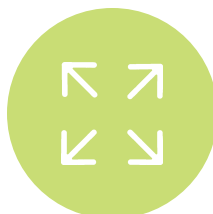
**More
intelligence**

Allow process owners to measure performance as well as provide intelligent real-time process adjustments.



**Easier
integration**

Allow departmental staff to easily integrate with enterprise systems and data.



Scalable

Provide more scalability. The product could be managed centrally and be distributed out to "citizen developers" in the departments.



**Reusable
processes**

Allow departmental staff to leverage a common library of solutions to quickly automate their own departmental processes.

Banner

Implementation for Banner 9

The next version of Banner is introducing some significant user interface improvements. The Banner 9 upgrade will change the appearance and navigation methods that University clients use in their daily application interactions.

The Banner 9 project is in progress. It will upgrade all Banner modules to Banner 9. The project will include the implementation of the Banner 9 Finance, Accounts Receivable, HR/Payroll, Student, FinAid, General, & BDM modules. We must move to Banner 9 administrative forms by the end of 2018 to ensure that we continue to receive Banner releases, patches, fixes & regulatory updates. Currently, testing is in progress by both AITS and end users. Communications with demos are being sent out to the Banner community to keep them informed of the new changes.

Due to the user interface changes we have worked to ensure the Banner users have been informed. To ease the changes we have created a Change Management plan that includes monthly communications and a website that is frequently updated. The website has a Banner 9 sandbox so people can see the new features on their own time. The website also has informative videos.

EXPECTED BENEFITS: Banner 9 will give users a new modern interface | Allow us to stay current on all regulatory updates as well as receive any new patches or fixes | Eliminates the need for client side Java plugin | Mobile friendly

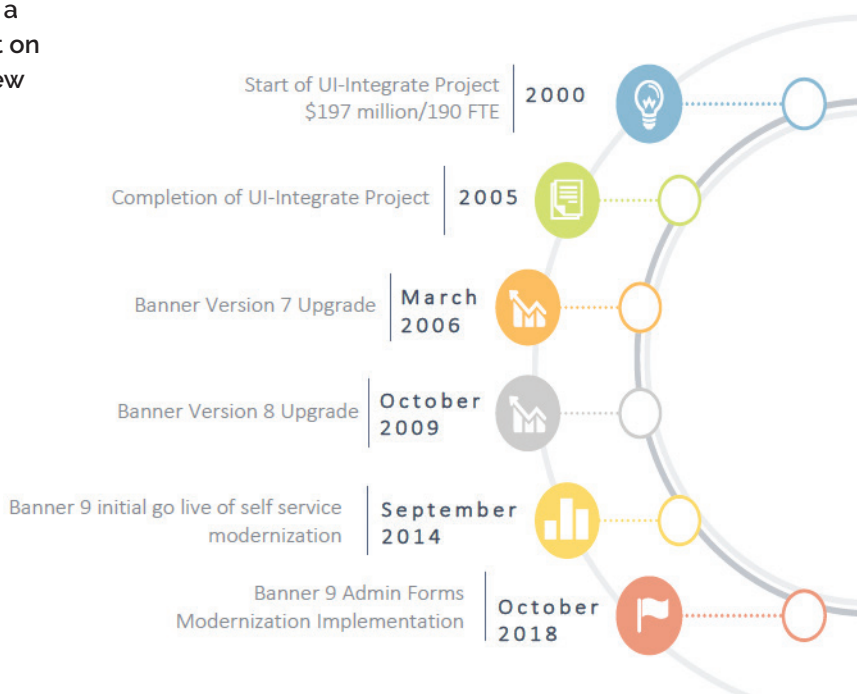
ERP

Fiscal Year 2018 has been a year of discovery related to our next-generation ERP strategy. Analysis has been done to see what other schools are doing and what analysts recommend. We are now reaching out to our business process owners to get their perspectives on the functionality aspect of Banner. Once we gather that information, the findings will be presented to senior University leadership and the next steps will be determined.

Next Steps



History of Banner



Source to Pay

Goal: Improve University procurement source to pay procedures

The BPI Shared Service collaborated with the Office of Business and Financial Services (OBFS) to develop the largest system-wide business process improvement effort to occur in years. The purpose and goal of the Source2Pay project was to analyze and improve University procurement source-to-pay procedures in support of an effort to identify and implement a streamlined source-to-pay IT solution. This project started in July 2016 and the process analysis was completed for 26 processes by March 2018.

Results: Streamlined processes and identified IT needs

Results of this multi-year analysis effort include streamlining the source-to-pay system of processes using the tools currently available as well as developing specifications for a system-wide RFP for a new enterprise software solution that will allow for further increases in efficiency. Comprehensive procurement process improvements will save units money and time through streamlined procurement practices, leveraged contract spend, and reduced training time.

Next Steps: Complete RFP and select a vendor

A team of people from OBFS, AITS, Strategic Procurement, Capitol Programs University Payables, UIC University Library, Purchasing, and University Contract Records office are working on completing the RFP. We expect that a vendor or vendors will be selected in FY19. After the system is selected and purchased, a number of ITPC projects will be created to help with the implementation and configuration of the selected systems.



BPI Facilitator leads a process analysis discussion with team members for the University Procurement Source-to-Pay project.

Comprehensive procurement process improvements will save units money and time

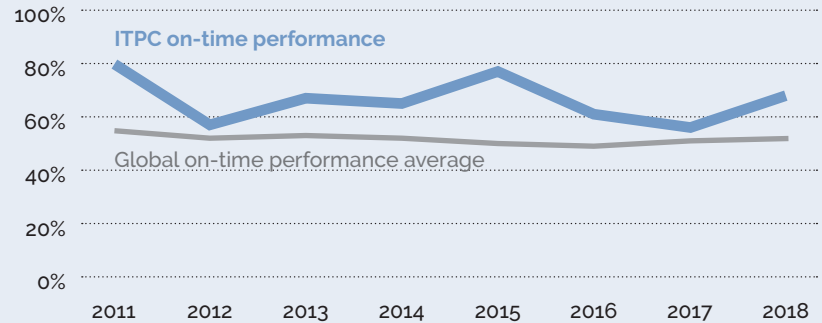
Performance

The dedication, creativity, and hard work of ITPC project teams and partners across the University of Illinois System shows in our project performance. ITPC projects consistently perform better than the global performance average, as published in PMI's Pulse of the Profession¹.

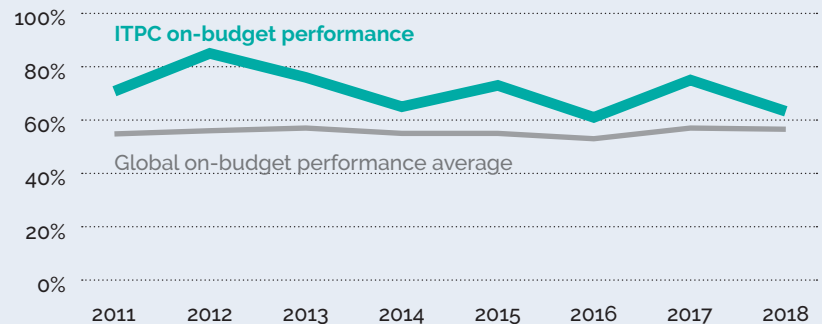
On an ongoing basis, ITPC publishes real time information regarding project performance and governance trends and totals. These dashboards are updated daily and are available at go.illinois.edu/ITPCDashboard.

¹PMI's Pulse of the Profession 2018. <http://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2018.pdf>

On-Time Performance



On-Budget Performance

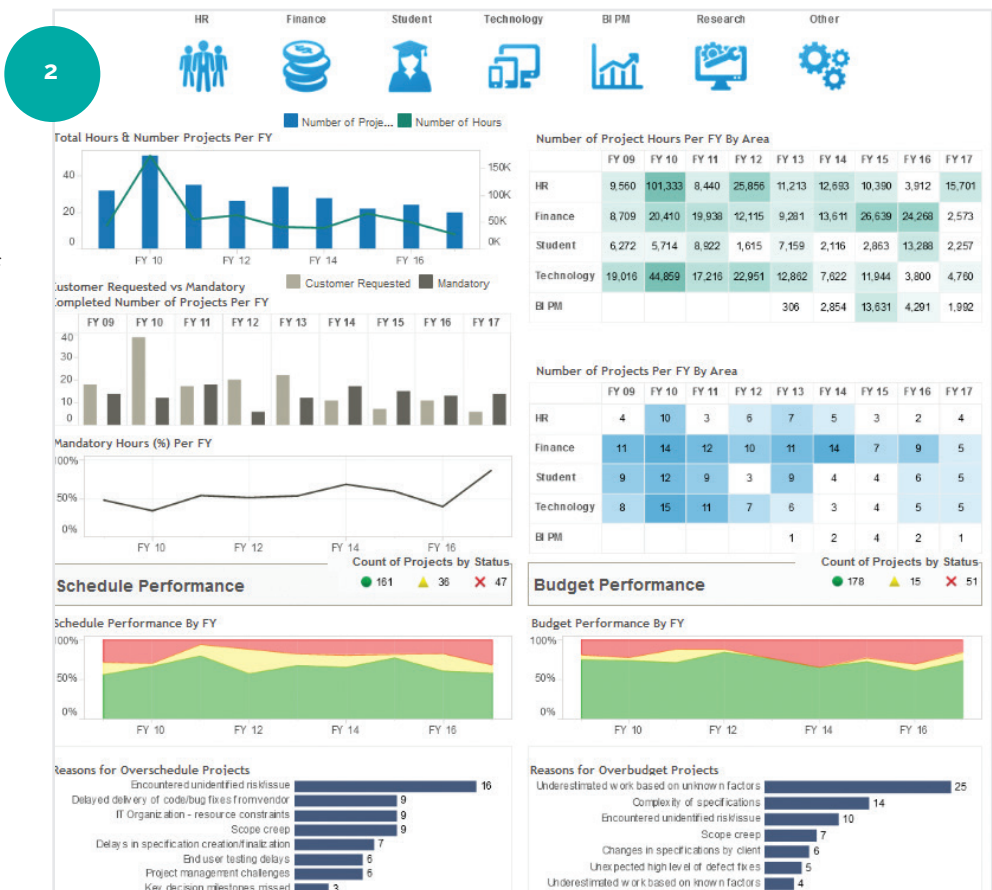


Members of an ITPC project discussing potential risks.

ITPC provides active project status in an interactive dashboard. This dashboard includes all in progress projects, status information, and hours by functional area.



ITPC provides portfolio component data by fiscal year. This dashboard displays counts of projects and hours by primary business area and by project type (mandatory or customer requested). It also shows project schedule and budget performance indicators at the time of project closing as well as a summary of the primary budget or schedule overage reasons.



Project Pipeline

Completed

In FY18, Systems IT staff completed 24 projects.

Project number and university impacted are included after the project description.

1. Maintain quality of account services to approximately 78,000 student users (0549) (ALL)
2. Ensure the continued efficient operations for the HR offices and University Payroll and Benefits by providing a stable and up to date set of systems (0550) (ALL)
3. Maintain compliance with federal regulations, policies, and ensure continued accurate processing of Financial Aid for students (0554) (ALL)
4. Ensure continued efficient and accurate processing of travel reimbursements (0553) (ALL)
5. Ensure continued efficient and accurate processing of contracts (0552) (ALL)
6. Maintain system necessary to continue strategic sourcing and procurement (0551) (ALL)
7. Maintain check printing and report reformatting (0562) (ALL)
8. Perform mandatory upgrade to existing degree audit and transfer software (0359) (ALL)
9. Add HireTouch Data into the data warehouse to allow for ad hoc reporting and analysis (0466) (ALL)
10. Help safeguard critical University systems and data by implementing multi-factor authentication (0497) (ALL)
11. Perform analysis required to implement system for providing employee training and compliance tracking (0421) (ALL)
12. Improve recruitment efforts by implementing a student CRM system that will allow for personalized and consistent communication (0504) (ALL)
13. Increase speed of student reimbursements (0514) (ALL)
14. Improve New Hire and UHR websites (0509) (ALL)
15. Create and implement a set of tools to significantly reduce the labor required to complete the Biennial

Inventory as mandated by the Illinois State Property Act. (0494) (ALL)

- 16-20. Maintain and upgrade the mission critical Student, HR, Finance, Payroll, and HR enterprise systems (BANNER) (0548, 0546, 0547, 0537, 0557) (ALL)
21. Upgrade SharePoint to provide latest features to University and System Office SharePoint users. (0539) (ALL)
22. Improve course scheduling for students (0527) (UIC, UIUC)
23. Ensure continued effective ITPM by upgrading Clarity PPM (0525) (ALL)
24. Upgrade and maintain report display and storage (0561) (ALL)

In Progress

1. Continue to modernize and streamline the research enterprise at the University of Illinois (0465) (ALL)
2. Continue to improve identity and access management at the University of Illinois (0375) (ALL)
3. Implement a vended system to manage and publish online catalogs and programs of study. (0412) (ALL)
4. Provide an integrated IT Solution for the management and assessment of disability services on all three universities (0491) (ALL)
5. Implement system for providing employee training and compliance tracking (0502) (ALL)
6. Implement new card vendor to reduce costs and increase ease of use (0528) (ALL)
7. Enhance the My UI Financials app, which provides easy, on-demand access to financial reports, allowing for the elimination of dated paper-based distribution processes (0558, 0554) (ALL)
8. Develop standards and guides for the user interface and architectural design of ITPC governed projects (0517) (ALL)
9. Reduce number of incorrectly processed financial transactions and provide timely student account status (0449) (ALL)

10. Maintain and upgrade enterprise decision support infrastructure. (0540) (ALL)
11. Provide system enhancements to ensure continued efficient operations for the HR offices and University Payroll and Benefits (ALL)
12. DUO/2FA Verify enhancements to improve accessibility and usability (0567) (ALL)
13. Use student interaction data to improve student recruiting, admissions, and communication activities (0560) (UIUC, UIC, UIS)
14. Analysis for business process automation tool (0564) (ALL)
15. Upgrade the existing Service Desk software in use by UIC HR, Payroll and Benefits, UIC ITS, AITS, and Tech Services (0572) (ALL)
16. Facilitate the creation of a more secure, reliable system for processing fellowships and student notices of appointment (0545) (UIC, UIUC)
17. Maintain system for document & image management (0563) (ALL)
18. Maintain and upgrade the mission critical Student, HR, Finance, Payroll, and HR enterprise systems (BANNER 9) (0565) (ALL)
19. Mandatory Oracle upgrade for mission critical systems (0555) (ALL)
20. Create report to validate the new bill received from SURS annually (0571) (ALL)
21. Analysis of B2GNow to see if can be used to track diversity contacts (0569) (ALL)
22. Migrate the enterprise application for academic, event, and final exam scheduling to the Cloud (0570) (ALL)
23. Update enterprise applications with the new System Office branding. (0556) (SYSTEM OFFICE)
24. Ensure continued efficient and accurate processing of contracts (0575) (ALL)
25. Ensure continued efficient and accurate processing of travel reimbursements (0574) (ALL)
26. Maintain quality of account services to approximately 78,000 student users (0578) (ALL)
27. Maintain system necessary to continue strategic sourcing and procurement (0573) (ALL)
28. Maintain compliance with federal regulations, policies, and ensure continued accurate processing of Financial Aid for students (0579) (ALL)
29. Ensure the continued efficient operations for the HR offices and University Payroll and Benefits by providing a stable and up to date set of systems (0577) (ALL)

In Queue

Listed in order of customer priority

1. Reduce the time it takes to process approximately \$15M in retro pay for an estimated 7,000 employees (0498) (ALL)
2. Enhancements to ensure efficient operations of HR/ Payroll (0541) (ALL)
3. Procurement Services: More flexible payment terms using iBuy (0568) (ALL)
4. Implement iBuy data into the data warehouse to allow for ad hoc reporting (0453) (SYSTEMS OFFICE)
5. Provide a streamlined enterprise-wide vacation and sick leave tracking system (0374) (ALL)
6. Integrate F&S Workplace Management System (AiM) in the Data Warehouse (0576) (SYSTEMS OFFICE, UIC, UIUC)
7. Allow for the continued growth of meaningful email addresses by expanding the NetID length (0496) (ALL)
8. Automate the manual process of loading contracts into the official BOT repository. (0515) (SYSTEM OFFICE)
9. Implement changes to HRFE, BANNER, and Positive Time Reporting systems to comply with the final ruling on the Fair Labor Standards Act (0543) (ALL)
10. Investigate options to meet two U.S. Department of Education regulations using our existing vended systems (0542) (ALL)



MORE INFORMATION

Interactive dashboards,
project proposals, upcoming
meetings, and previous annual
reports can be found at
www.itpc.uillinois.edu.