



UNIVERSITY OF ILLINOIS SYSTEM
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ITPC

Information Technology
Priorities Committee

FY17
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 FY17 and looks ahead to FY18.

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.



**DEBBY BORG and
DARYL FRITCHEY**

Debbi and Daryl are reviewing test results for an ITPC project.



**STEPHANIE CUMMINGS and
MARY COMBS**

Stephanie and Mary discuss possible solutions.

ITPC Focus on Strategy

MEMBERS

- ***Chair: Michael Hites**, Senior Associate Vice President for AITS and CIO
- **Anne Craig**, Senior Director, Consortium of Academic and Research Libraries in Illinois (CARLI)
- **Clarice Ford**, Interim Vice Chancellor for Student Affairs, UIS
- **Cynthia Herrera Lindstrom**, CIO, ACCC, UIC
- **Dimuthu Tilakaratne**, Assistant Vice President of Decision Support, AITS, System Office
- **Farokh Eslahi**, Associate Provost / Information Technology, UIS
- **Ilir Zenku**, AVP Health Information Services, UIC
- **Jami Painter**, Assistant Vice President for Human Resources, System Office
- **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
- **Michael Bass**, Senior Associate Vice President, Office of Business and Financial Services, System Office
- **Michael McClintick**, CIO, University of Illinois Foundation
- **Sarah Zehr**, Assistant Vice President for Academic Affairs, System Office
- **Todd Van Neck**, IT Governance Council—Administration (Chair), UIC
- **Wendy Petruzzello**, Director of Business Information / Interim CIO, Alumni Association
- **Vacant**, UIC Faculty Representative
- **Vacant**, UIUC Faculty Representative

FY16 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.

August
2016

Gap Analysis

ITPC reviewed the UI System Strategic Framework and mapped our current portfolio of projects to specific strategies. As a result, we discovered a number of strategies that are underrepresented in our portfolio. Of those underrepresented strategies, we identified specific initiatives that present an opportunity for ITPC to contribute.

December
2016

Initiative Prioritization

ITPC used the December meeting to focus on the initiative level within the Strategic Framework and prioritized the initiatives on which ITPC could have the most impact. We ranked the following initiatives as high priority:

- Increase and diversify our funding streams, including new income from sponsored research, tech transfer, alternative course delivery methods, revision to the academic calendar, and other steps.
- Improve our operational efficiency, increase our administrative productivity, improve utilization of our physical plant, and identify other means to trim our operating expenses while enhancing the quality of our teaching, research, and service.
- Develop a System-wide strength in data analytics that draws on the numerous efforts underway across our universities, informs planning, and serves as a comprehensive repository of reliable data that is easily accessible by all of our universities, regional campuses, and Illinois Extension sites.
- Develop information and tools that make the full resources of the University (e.g., courses, research opportunities, service-learning experiences, information and data) accessible to students so that we become a next-generation model for the distributed public university system.
- Develop online tools, similar to those used for degree auditing, that provide automated progress tracking of career preparation, academic and personal advisement, and preparation for graduate study.

February
2017

Strategic Focus Selection

ITPC reviewed the Strategic Framework, the UIC Resource Strategy Team Report, and the UIC ITGC Admin business process recommendations. We proposed 5 strategic areas for ITPC to focus on over the next 2-3 years.

- Student progress tracking
- Data analytics
- Design principles
- Focus on blended (cloud and premise) or cloud implementations
- Focus on reducing complexity of business processes

April
2017

Collaboration and feedback

We reviewed strategic areas with stakeholders at the ITPC Summit. Group activities at the summit were designed to gather feedback, recommend approaches, and encourage collaboration within these strategic areas.

July
2017

Implementation

As of July, strategic items have been added to the project rating criteria that inform approval and prioritization of projects. In addition, ITPC committees will begin encouraging the development of proposals that fall into these strategic areas of focus.



CHERI GORRELL

Cheri helps lead the HR ITPC project work.



TARA SADLER

Tara Sadler is the Tableau Dashboard expert. She was instrumental in developing the ITPC metrics dashboards.



ADAM LEGRANDE

Adam leads our data automation and workflow work, providing solutions for many of our ITPC clients.

Project Highlights

In FY17, we continued work on some large projects and started preparing for the next major Banner upgrade.

Biennial Inventory

This mobile application allow the University of Illinois to be more effective in performing its biennial inventory and reduce the chances for audit findings. Any continued recurring audit findings may result in lost revenue and grant funding based on critical evaluations from Federal and State government funding sources. This project will increase compliance with the Illinois State Property Act and is expected to provide internal labor savings of approximately \$800,000 per year. (STATUS: IN PROGRESS)

President's Dashboard

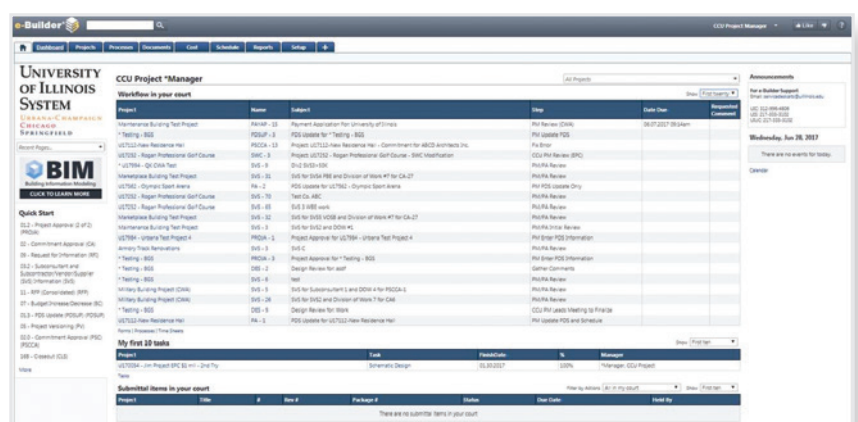
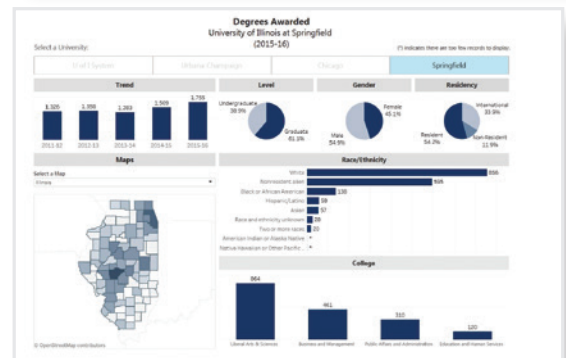
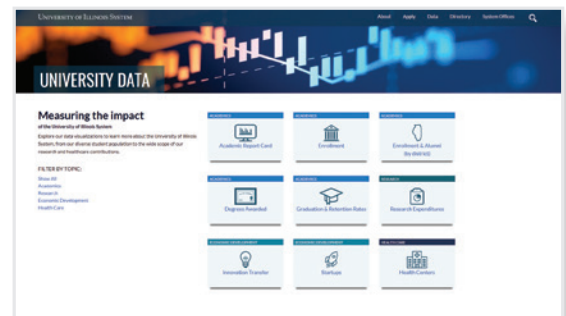
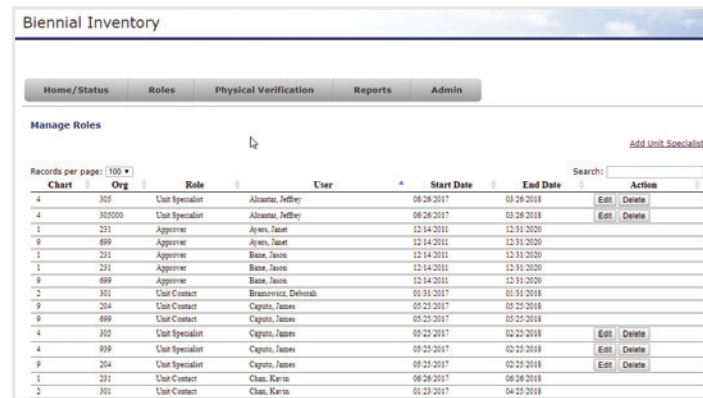
This project added functionality to the President's website by redesigning the Administrative Services page, adding additional interactive visualizations, and developing a report card that is integrated with key metrics throughout the website.

The Report Card is filling a need by the State of Illinois to provide visual information to key decision makers in the form of a Compact report. The Report Card represents a summary of the University's data in the form of metrics, text, or visual data. (STATUS: COMPLETE)

Capital Project Management System

The University Office of Capital Programs and Real Estate Services uses 10 year old, poorly integrated systems to facilitate the capital delivery process. This project is minimizing the need for redundant data entry and allowing for enhanced workflow. This unified project management system will facilitate compliance, consistency, error detection, and reporting. Expected internal labor savings is approximately \$285,000 per year.

(STATUS: IN PROGRESS)



Mandatory HR Work

FY17 saw no decrease in the amount of mandatory HR changes that required ITPC projects to implement.

- Analysis and implementation of systems for Patient Protection and Affordable Care Act (PPACA) (STATUS: COMPLETE)
- Implement changes to HRFE, Banner, and Positive Time Reporting systems to support the Fair Labor Standards Act (STATUS: ON HOLD PENDING COURT CASE)
- Mandatory Title IX Training System Implementation (STATUS: COMPLETE)
- Conversion of Nessie benefits systems to State of Illinois mandated vendor (STATUS: COMPLETE)

EXPECTED BENEFITS:
Sets the stage for a required upgrade to core administrative technology | Maintains stable environments for critical Finance, AR, Payroll, Financial Aid, and Student processes | Reduce risk and help ensure a successful upgrade to the new XE architecture with minimal impact to faculty, students, and staff

Preparation 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. In addition, Banner 9 will eliminate the need for client side java software, which is expected reduce the support work needed to manage end user. (STATUS: IN PROGRESS)

There are four projects that are helping us prepare for this change:

- Analysis for Finance and Accounts Receivable systems
- Analysis for HR and Payroll systems
- Analysis for Banner General forms
- Analysis for Student systems

This work involves assessing the impact of the upgrade, analysis and conversion of mods, and preparing training and roll out materials.

BEFORE

AFTER

Planning

The 2017 ITPC Planning Summit brought together academic, technical and business leaders from across the University of Illinois System. Throughout the day, invited participants took part in discussions to inform strategic IT areas and to provide feedback for more effective ITPC processes.

The focus of the day was on how the ITPC process can further support System and University strategies, as well as enable process improvements and enhanced capabilities for business process efficiency and effectiveness.

The morning and afternoon sessions followed a like format with an introduction to breakout topics, followed by a participant workgroup breakout session, and concluded with a report back from the breakout workgroup with all summit participants. The guided discussion topics were

- Enhancing Capabilities for System Business Process Efficiency and Effectiveness: Workflow, Self Service, Data Analytics
- Redesigning U of I System Processes and IT Systems: Business process improvement, System design characteristics, Next-generation ERP (Banner)

Key Findings

- Investigate enhancements to existing enterprise workflow and business process automation tools.
- Assess student, faculty, and staff user needs for self-service tools, portals, and access to data.
- Streamline processes to access and reduce complexity posted by different data tools, systems, and data sets.
- Improve standard business processes to make it easier for departments to retire redundant systems.

104
registrants
and over
30
campus and
system units
were represented at this year's
ITPC summit

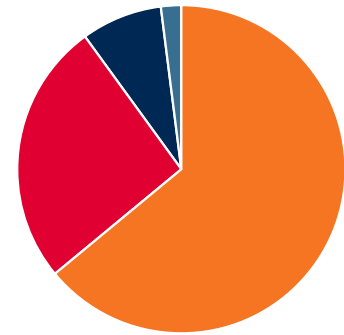


Progress to Date

ITPC resources, along with our dedicated partners across the University of Illinois System, have been working on addressing these key findings. Notable progress to date includes:

- We ITPC resources have been upgrading our existing workflow toolset as well as evaluating other tools, including a possible beta test of the new Ellucian Workflow product.
- We have continued our effort to analyze and design the optimal digital experience for University of Illinois Students. Our activities include focused discussions with partners and brainstorming sessions to identify ways to improve the digital experience and drive student fulfillment and success.
- We have continued a major effort to facilitate University Procurement Source-to-Pay business process analysis and improvement. As of the end of FY 17, 15 of the 24 distinct process improvement projects have been completed.

Participants by Campus and Governance Representation



- Urbana | 64%
- Chicago | 26%
- Springfield | 8%
- System | 2%



Preparing for the Future

While on-premises large Enterprise Resource Planning systems (such as Banner) are now the dominant form of enterprise resource planning system in higher education, cloud solutions are emerging (Workday, Oracle, Ellucian, and others) and will increase functionality and market share considerably over the next five years.¹ Gartner calls the planned use of cloud and on-premise systems to support business processes and users, a postmodern ERP.

The postmodern ERP is a technology strategy that automates and links administrative and operational business capabilities (such as finance, HR, and purchasing) with appropriate levels of integration that balance the benefits of vendor-delivered integration against business flexibility and agility. Over the next several years, the University will need to evaluate our current product portfolio for enterprise systems, the current state of art in the marketplace, and our ability or inability to redesign university business processes to take advantage of potential efficiencies between processes and systems.

The future state of business processes at the university, that support and enable the mission activities of the enterprise, should be the main focus of adding value through business process evaluation. Business process evaluation provides periodic assessment of an organization's processes in order to ensure:

- Quality and value of services to university constituents
- Process alignment to strategies of university
- Continuous improvement of processes and services
- Prerequisite due diligence to major systems analysis and implementation
- Prerequisite strategy and goals to organizational change

The systems and technologies that support the processes should be a byproduct of business process optimization. Efforts to reduce the complexity of both processes and systems make utilizing both easier for end users and more efficient operationally and to support. Where simplification is not possible, then switching from complicated system A to complicated system B doesn't make sense. Systems should be designed and implemented primarily from a customer-centric perspective.

¹ Nigel Rayner, Postmodern ERP Strategy Is Key to Success With ERP Initiatives, Gartner Research, <http://www.gartner.com/document/3110221?ref=lib> (August 11, 2015).

Our preparatory work should focus on the primary goal of analyzing and improving business processes to improve customer functionality and satisfaction as well as process efficiency. A secondary component of this work will be to select the postmodern ERP model that empowers and facilitates the primary goal.

Plan of Work

- Inventory and map business processes. Identify processes for improvement
- Develop a strategy for the future state of university business processes, organization required to support future state, and supporting IT systems whether cloud, on-premises, or other 'postmodern ERP' model.
- Identify select future state business processes and complete request for proposal for future state systems and services
- Implement new business processes with associated organizational requirements and new systems



DAVE STONE

Dave is a technical expert on our HR systems. He's involved in most HR projects.

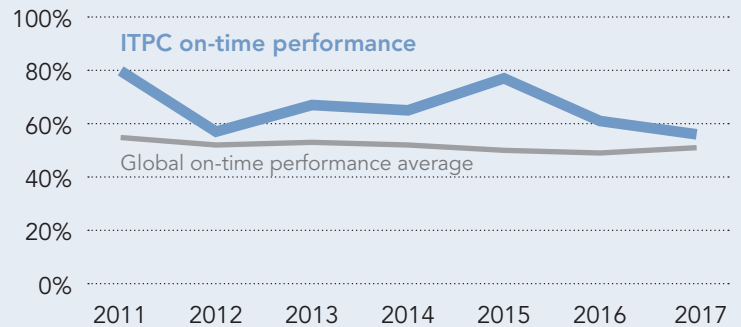
Performance

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 Profession².

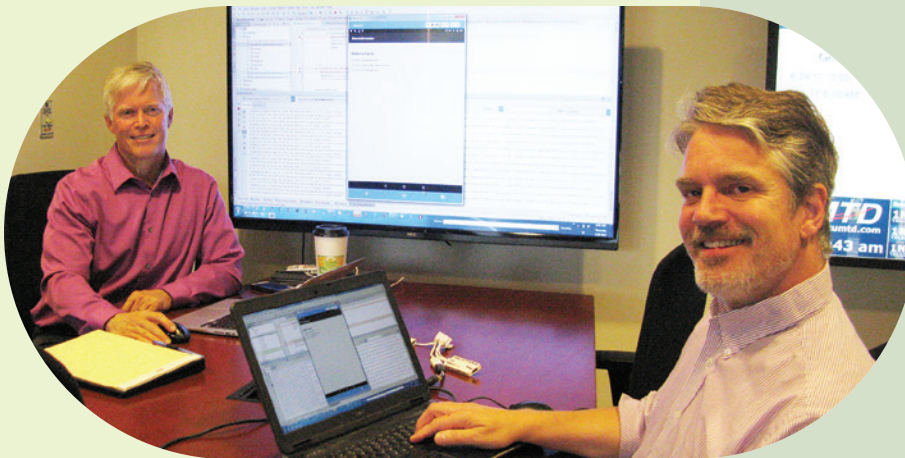
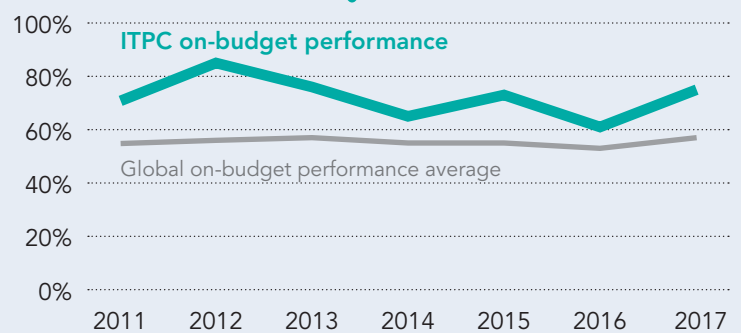
On an ongoing basis, ITPC publishes real time information regarding project performance and governance trends and totals. These dashboards are updated daily and are available at <http://go.illinois.edu/ITPCDashboard>.

² PMI's Pulse of the Profession 2017. <http://www.pmi.org/-/media/pmi/documents/public/pdf/learning/thought-leadership/pulse/pulse-of-the-profession-2017.pdf>

On-Time Performance



On-Budget Performance



JIM CAPUTO and VINCE WILEY

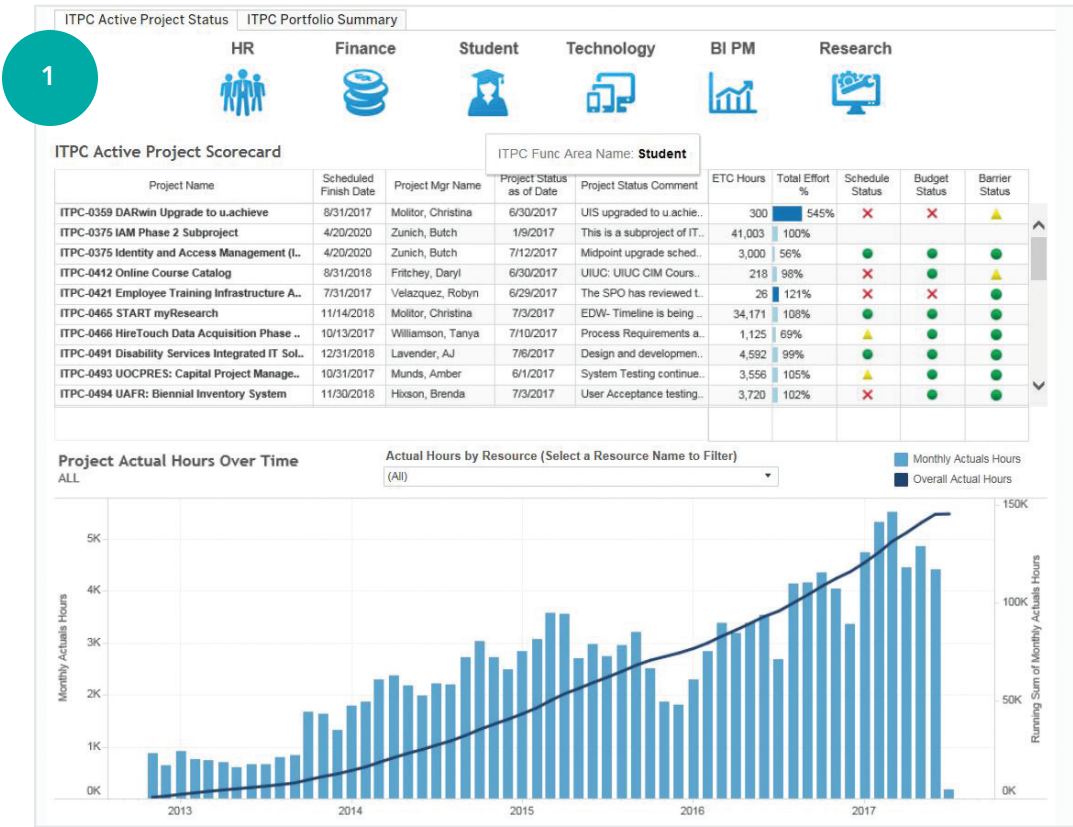
Jim and Vince are discussing the mobile solution for the Biennial Inventory project.



TODD BICKERS

Todd is a developer for the Identity and Access Management project.

ITPC provides portfolio component data by fiscal year. This dashboard (FIGURE 1) displays counts of projects and hours by primary business area and by project type (mandatory or customer requested).



In addition to current project status, ITPC also publishes performance data and trends for ITPC projects. The following dashboard (FIGURE 2) 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 FY16, UA IT staff completed 22 projects. Project number and campus impacted are included after the project description.

- Reduce manual work required to meet federal financial reporting requirements (0442) (ALL)
- Implement resource and room scheduling tool for UIC departments (0468) (UIC)
- Maintain and upgrade the messaging system that allows campus and UA organizations to query and update Banner, EAS, and ICard data. (0487) (ALL)
- Reduce rework and errors as a result of incorrect financial codes by providing a method to validate FOAPAL codes upon entry into the system (0499) (ALL)
- Upgrade the existing Service Desk software in use by UIC HR, Payroll and Benefits, UIC ITS, AITS, and Tech Services (0501) (ALL)
- Investigate requirements for a University wide electronic document management service (0503) (All)
- Maintain quality of account services to approximately 78,000 student users (0508) (ALL)
- 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 (0510 AND 0533) (ALL)
- Maintain compliance with federal regulations, policies, and ensure continued accurate processing of Financial Aid for students (0511 AND 0535) (ALL)
- Reduce risk to critical student and faculty business processes by upgrading uPortal software (0512) (UIC)
- Provide a method for students, faculty, and staff to designate a preferred first name in HR, Student, and iCard systems of record (0519) (ALL)
- Implement the necessary tracking and reporting mechanisms to ensure completion of this training as required by 110ILCS 155 Preventing Sexual Violence in Higher Education Act (0521) (ALL)
- Redesign the UI President's website by adding to the Report Card, a compact, visual set of metrics designed for State of Illinois decision makers (0524) (SYSTEM OFFICE)
- Provide infrastructure for mandated electronic transcript services. (0534) (ALL)
- Maintain and upgrade the mission critical enterprise system (BANNER) (0536) (ALL)
- Change systems to accommodate new State of Illinois CMS vendor (0538) (ALL)
- Ensure continued efficient and accurate processing of travel reimbursements (0529) (ALL)
- Ensure continued efficient and accurate processing of contracts (0530) (ALL)
- Implement monitoring, tracking, and reporting solution as mandated by the Patient Protection and Affordable Care Act. (0463) (ALL)
- Maintain system necessary to continue strategic sourcing and procurement (0532) (ALL)

In Progress

- Perform mandatory upgrade to existing degree audit and transfer software (0359) (ALL)
- Continue to improve identity and access management at the University of Illinois (0375) (ALL)
- Implement a vended system to manage and publish online catalogs and programs of study. (0412) (ALL)
- Perform analysis required to implement system for providing employee training and compliance tracking (0421) (ALL)
- Continue to modernize and streamline the research enterprise at the University of Illinois (0465) (All)
- Add HireTouch Data into the data warehouse to allow for ad hoc reporting and analysis (0466) (ALL)
- Provide an integrated IT Solution for the management and assessment of disability services on all three campuses (0491) (ALL)
- Implement a consolidated project management system for use by the University Office of Capital Programs and Real Estate Services (0493) (SYSTEM OFFICE)
- 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)

- Help safeguard critical University systems and data by implementing multi-factor authentication (0497) (ALL)
- Improve recruitment efforts by implementing a student CRM system that will allow for personalized and consistent communication (0504) (ALL)
- Improve New Hire and UHR websites (0509) (ALL)
- Increase speed of student reimbursements (0514) (ALL)
- Automate the manual process of loading contracts into the official BOT repository (0515) (SYSTEM OFFICE)
- Ensure continued effective ITPM by upgrading Clarity PPM (0525) (ALL)
- Improve course scheduling for students (0527) (ALL)
- Implement new card vendor to reduce costs and increase ease of use (0528) (ALL)
- Upgrade SharePoint to provide latest features to University and System Office SharePoint users. (0539) (ALL)
- Provide system enhancements to ensure continued efficient operations for the HR offices and University Payroll and Benefits (ALL)
- Maintain and upgrade the mission critical Student, HR, Finance, Payroll, and HR enterprise systems (BANNER) (0548, 0546, 0547, 0537, 0555, 0557) (ALL)
- Maintain quality of account services to approximately 78,000 student users (0549) (ALL)
- 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)
- Maintain system necessary to continue strategic sourcing and procurement (0551) (ALL)
- Ensure continued efficient and accurate processing of contracts (0478 AND 0506) (ALL)
- Ensure continued efficient and accurate processing of travel reimbursements (0553) (ALL)
- Maintain compliance with federal regulations, policies, and ensure continued accurate processing of Financial Aid for students (0554) (ALL)
- Update enterprise applications with the new System Office branding (0556) (SYSTEM OFFICE)

In Queue

Listed in order of customer priority

- Provide a streamlined enterprise-wide vacation and sick leave tracking system (0374) (ALL)
- Reduce the time it takes to process approximately \$15M in retro pay for an estimated 7,000 employees (0498) (ALL)
- 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 (ALL)
- Consolidate and provide access to Compass and Moodle Learning Management System Data in order to assess and improve student learning experiences (0526) (UIUC)
- Implement iBuy data into the data warehouse to allow for ad hoc reporting (0453) (UA)
- Implement system for providing employee training and compliance tracking (0502) (ALL)
- Perform analysis for providing consistent access to legacy HR and Payroll data (0462) (ALL)
- Develop standards and guides for the user interface and architectural design of ITPC governed projects (0517) (ALL)
- Allow for the continued growth of meaningful email addresses by expanding the NetID length (0496) (ALL)
- Reduce number of incorrectly processed financial transactions and provide timely student account status (0449) (ALL)
- Provide a more efficient and accurate method to meet the mandated Civil Service tracking requirements. (0464) (SYSTEM OFFICE)
- Maintain and upgrade enterprise decision support infrastructure (0540) (ALL)
- Implement changes to HRFE, BANNER, and Positive Time Reporting systems to comply with the final ruling on the Fair Labor Standards Act (0543) (ALL)
- Investigate options to meet two U.S. Department of Education regulations using our existing vended systems (0542) (ALL)

The background of the entire page is an abstract network diagram. It consists of numerous nodes, represented by circles of various colors (black, white, yellow, orange, red, pink, purple, blue, teal, green, and brown), connected by thin, dark grey lines. The lines crisscross the page, creating a complex web of connections. Some nodes are larger than others, and the overall layout is non-uniform and organic.

MORE INFORMATION

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