

VII. STANDING COMMITTEES**A. Academic and Student Affairs Committee**

in Joint Session with

B. Finance, Audit and Facilities Committee**UW Strategy for Administrative Systems and Information Management****INFORMATION**

This briefing outlines the UW's strategy for incrementally modernizing its administrative systems and continuing to enhance its information management capabilities. The Board of Regents requested this briefing to provide background and context for the UW's HR/Payroll Replacement project. This presentation is for information only.

BACKGROUND

The University of Washington (UW) is a premier global research and educational institution with a \$4.6 billion budget, over 42,000 students, and a large, complex and diverse workforce of 40,000 people including faculty, researchers, clinical personnel, student workers and administrative staff, making it the third largest employer in the state.

Despite the size, scope and complexity of the institution, the UW's legacy administrative systems that support its critical business operations are more than 30 years old and are no longer meeting the University's current business needs. The University has been making incremental enhancements to its systems to keep up with changing business and regulatory requirements, and will continue with this approach. But the University has reached a point where it needs to replace its aging core legacy transactions systems, starting with the human resources and payroll system (HEPPS and other supporting systems).

These legacy systems have limited functionality and are becoming increasingly difficult to upgrade. Resulting operational inefficiencies are negatively impacting the productivity of faculty and staff at every level of the institution. Departments and units have developed hundreds of redundant shadow systems to compensate for missing functionality at considerable cost and effort. University faculty and staff cannot get the information they need to support effective management and decision making.

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UW STRATEGY

The University is moving forward with a strategy to replace its core legacy administrative systems, starting with the HR/Payroll system. Given the magnitude of the replacement efforts, only one system can be replaced at any given time. In parallel with the HR/Payroll Replacement project, incremental improvements and infrastructure work will continue in the Financial, Student and Research functional areas.

The UW's strategy focuses on building an architecture that minimizes vendor lock-in, where possible, and provides flexible, next-generation functionality to support the UW's current and future business needs. To that end, a combination of commercial solutions, open-source and emerging platforms will be used to enable integration and reporting across the enterprise. The effort is being funded through a combination of operating and capital dollars. Capital funding is included in the UW's One Capital Plan, pending approval by the Board of Regents.

KEY INITIATIVES

The following replacement and incremental modernization efforts are currently underway:

- **Replace the UW's legacy HR/Payroll system** (Summer 2011 – Fall 2017)
The University is moving forward with a project to implement an integrated solution for payroll and human resource management that has the flexibility to respond to complex and changing payroll rules and regulations, as well as the ability to process payroll for all UW employees, including clinical and medical staff. The new system must be able to retain all information about positions, appointments and employees, including a full life cycle of employment—from recruitment to retirement or separation. Key project milestones:
 - Conduct feasibility study (Summer 2011 – Complete).
 - Draft RFP and investment plan (Spring 2012 – Complete).
 - Launch Business Process Redesign (Summer 2012 – Complete).
 - Obtain state approvals for RFP (Summer 2012 – Complete).

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- Issue RFP (Fall 2012 – Complete).
- Assess bids and recommend a vendor (Fall 2012 – Fall 2013).
- Seek Board of Regents approval to issue contract (Fall 2013).
- Assuming Regental approval, start implementation (Winter/Spring 2014), with a goal of beginning to deliver functionality in phases, starting in 2017.

- **Modernize the student experience**
 - Continue the UW's investment in the Quali Student consortium (authorized by the Board of Regents October 16, 2008), a partnership with peer institutions to develop a next-generation student system.
 - Continue MyPlan Phase 2 with a focus on addressing high-priority needs identified by students, including the addition of time schedule information to support detailed pre-registration planning, advisor created sample plans, and a scaled down mobile version.
 - Continue build-out of financial aid student self-service, building on new features that allow students to track the status of their financial aid and take action on outstanding items that may be blocking their awards (FY13).
 - Initiate Curriculum Management System implementation, to manage information about the UW's curriculum, including requirements, learning objectives and fees (Quali first release November 2010; UW implementation FY13 – FY14).
 - Complete Microsoft Dynamics Customer Relationship Management proof of concept, to improve interactions and communications with key UW constituents, including students and parents (Fall/Winter 2012).

- **Deliver high-value Financial system enhancements (FY13)**
 - Expand on current efforts to modernize procurement applications to a broader Procure-to-Pay initiative that makes it easier and more efficient for staff to acquire and pay for goods and services and enables the University to analyze and manage its spending.
 - Continue enhancements to MyFinancial.Desktop, a Web interface that offers staff a convenient way to monitor budget balances, reconcile transactions, build custom reports, plan future budget activities and post expenses online.

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- Expand user access to financial data analytics (Financial Cube) via the Enterprise Data Warehouse.
- Continue enhancements to faculty effort certification and cost sharing that support grant tracking, management and compliance with federal reporting requirements.

- **Invest in Enterprise Information Management (Ongoing)**
 - Continue building out the UW's Enterprise Data Warehouse to provide the University with a "Single Source of Truth," that includes institutionally agreed upon data definitions.
 - Continue to deliver integrated analytics and reports, including data marts like the Financial Cube that provide enhanced decision support analytics.
 - Continue to develop enterprise workflow functionality to automate and streamline business processes.
 - Implement an Enterprise Document Management system to increase efficiencies by capturing, storing and managing electronic content.