IT Service Investment Board

January 15, 2013

UNIVERSITY *of* WASHINGTON

Agenda

- Approve 12/12/12 Meeting Notes
- IT Service Investment Board Proposed 2013 Timeline
- UW Strategy for Administrative Systems and Information Management Overview
- IT Project Support Reserve – Request for FY 2014

Approve

- Notes from IT Service Investment Board meeting on 12/12/12

Proposed 2013 Timeline

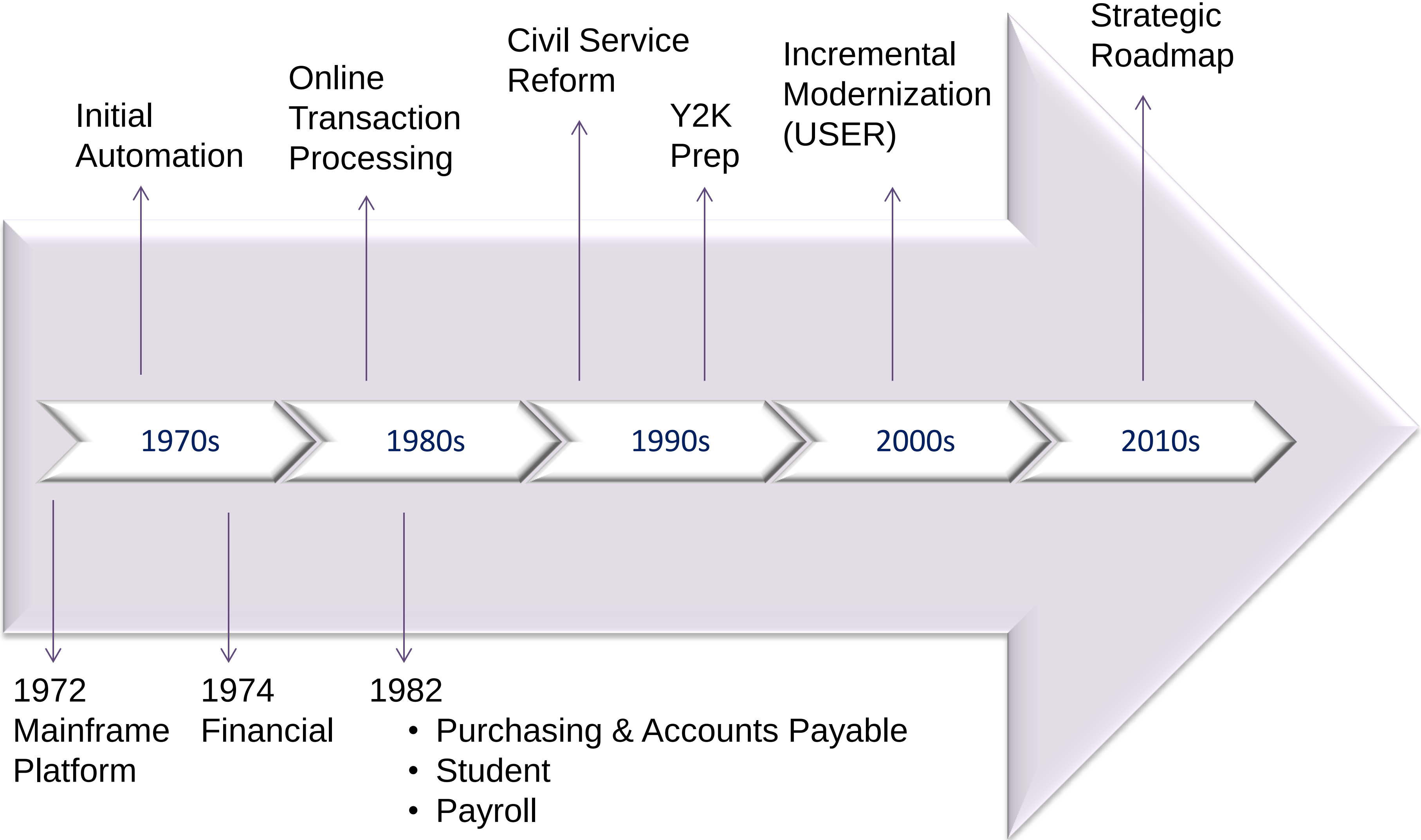
Month	IT Service Investment Board Topic
January 15	UW Strategy for Administrative Systems & Information Management
March 4	Administrative Systems & Information Management - key issues and challenges
April 19	Teaching & learning tools and resources, and productivity & collaboration tools - major initiatives and key issues/challenges
May	Infrastructure and foundation services, research support, business continuity, security and privacy - major initiatives and key issues/challenges
June	Review and input on IT Service Management Board service recommendations
September and October	Review and prioritize UW-IT project portfolio
November and December	Review TRF funding levels

UW Strategy for Administrative Systems & Information Management

Problem: The UW Has Changed

		1982	Current
Annual Revenue		$552 million	$4.6 billion
Primary Revenue Sources	State appropriation	28%	8%
	Tuition and fees	13%	13%
	Research grants and contracts	27%	31%
	Patient care	14%	26%
Human Resources	Number of employees	20,000	40,000
	Unionized staff	7,000	17,000

UW Administrative Systems History



1970s

1980s

1990s

2000s

2010s

Initial Automation

Online Transaction Processing

Civil Service Reform

Y2K Prep

Incremental Modernization (USER)

Strategic Roadmap

1972
Mainframe Platform

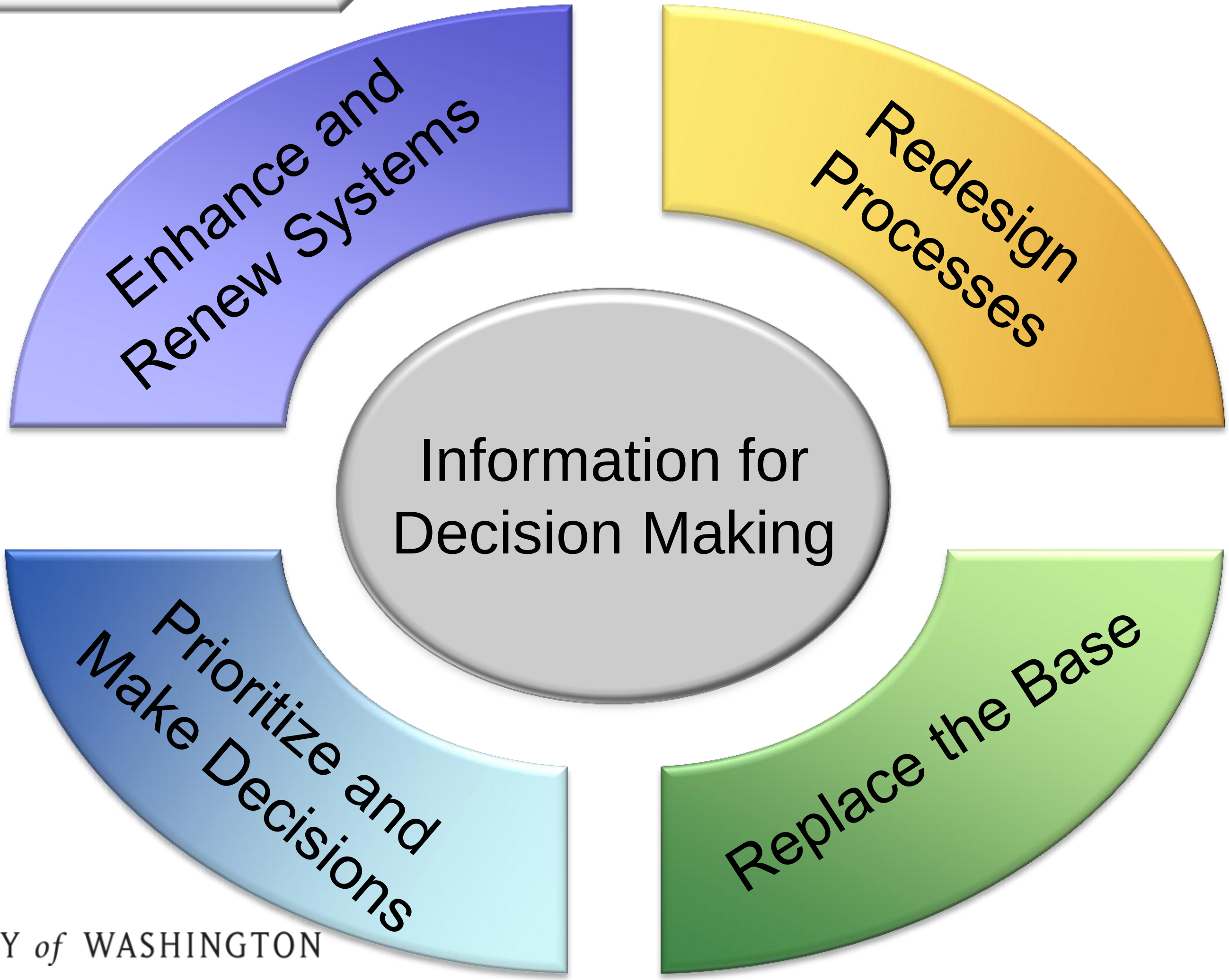
1974
Financial

1982
- Purchasing & Accounts Payable
- Student
- Payroll

UW Administrative Systems History

2010s

UW Strategic Roadmap



Enhance and Renew Systems

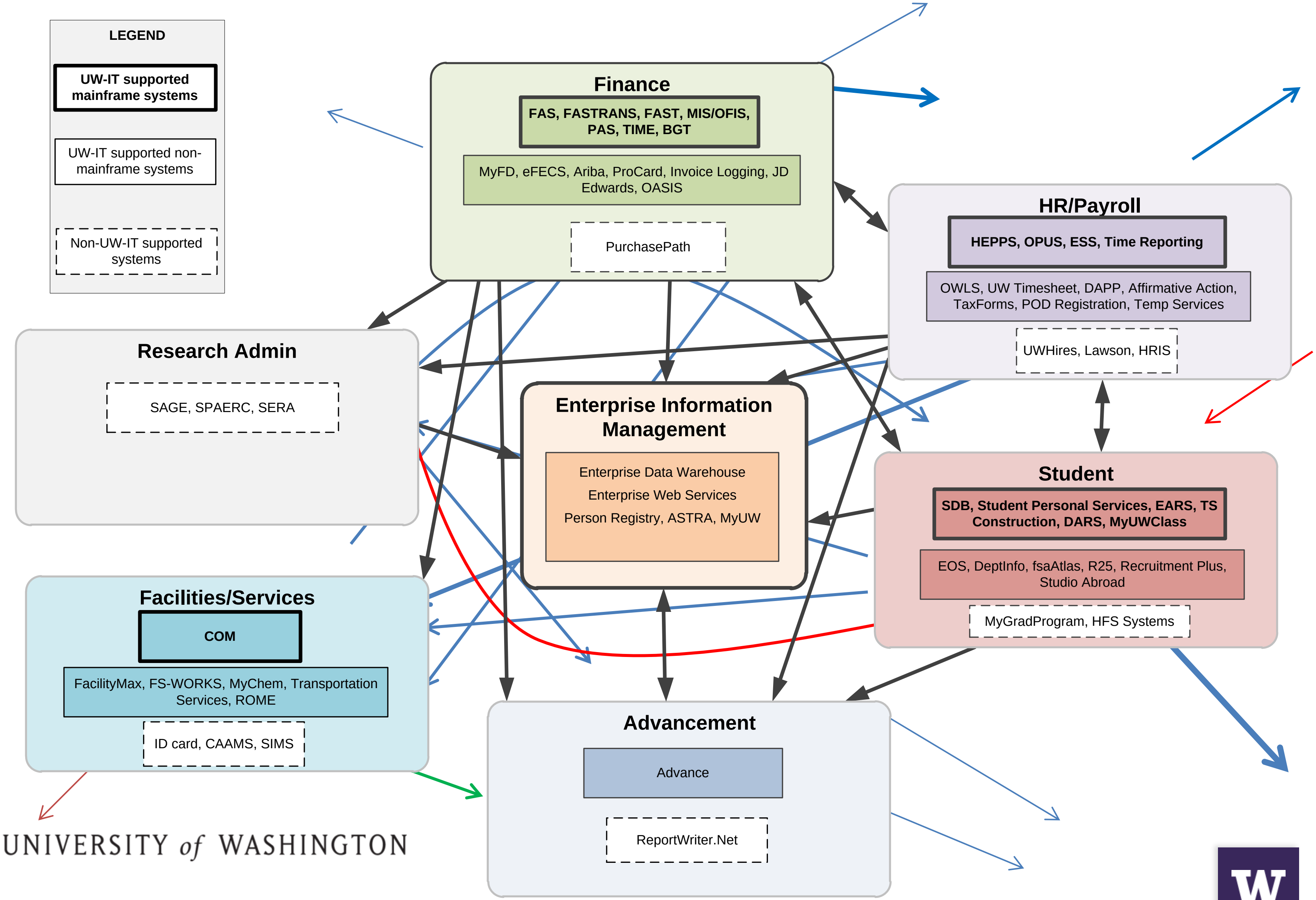
Redesign Processes

Information for Decision Making

Prioritize and Make Decisions

Replace the Base

Today's Enterprise Systems



LEGEND

UW-IT supported mainframe systems

UW-IT supported non-mainframe systems

Non-UW-IT supported systems

Finance

FAS, FASTRANS, FAST, MIS/OFIS, PAS, TIME, BGT

MyFD, eFECS, Ariba, ProCard, Invoice Logging, JD Edwards, OASIS

PurchasePath

HR/Payroll

HEPPS, OPUS, ESS, Time Reporting

OWLS, UW Timesheet, DAPP, Affirmative Action, TaxForms, POD Registration, Temp Services

UWHires, Lawson, HRIS

Research Admin

SAGE, SPAERC, SERA

Enterprise Information Management

Enterprise Data Warehouse
Enterprise Web Services
Person Registry, ASTRA, MyUW

Student

SDB, Student Personal Services, EARS, TS Construction, DARS, MyUWClass

EOS, DeptInfo, fsaAtlas, R25, Recruitment Plus, Studio Abroad

MyGradProgram, HFS Systems

Facilities/Services

COM

FacilityMax, FS-WORKS, MyChem, Transportation Services, ROME

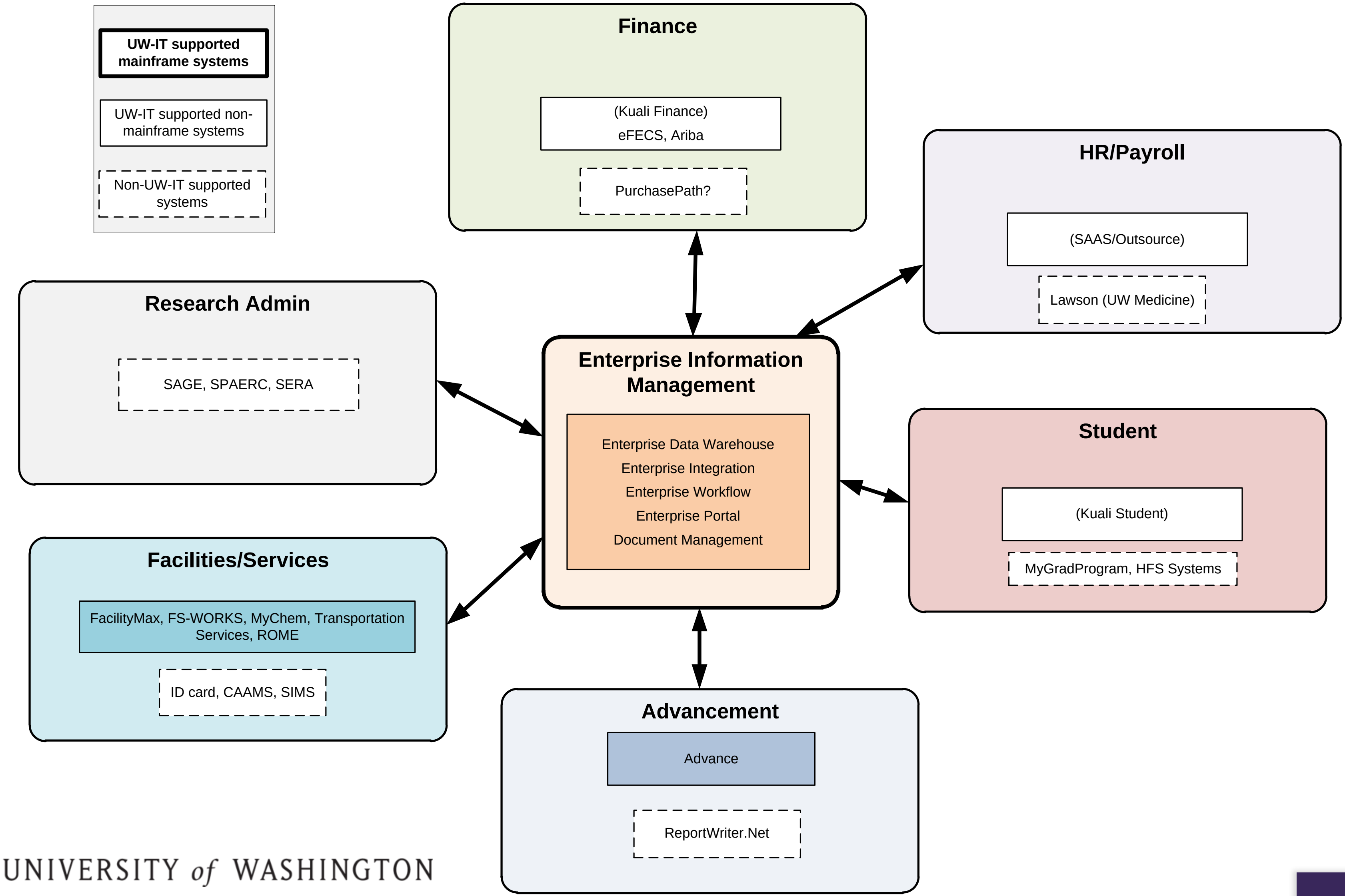
ID card, CAAMS, SIMS

Advancement

Advance

ReportWriter.Net

Tomorrow's Enterprise Systems



UW-IT supported mainframe systems

UW-IT supported non-mainframe systems

Non-UW-IT supported systems

Finance

(Kuali Finance)
eFECS, Ariba

PurchasePath?

HR/Payroll

(SAAS/Outsource)

Lawson (UW Medicine)

Research Admin

SAGE, SPAERC, SERA

Enterprise Information Management

Enterprise Data Warehouse
Enterprise Integration
Enterprise Workflow
Enterprise Portal
Document Management

Student

(Kuali Student)

MyGradProgram, HFS Systems

Facilities/Services

FacilityMax, FS-WORKS, MyChem, Transportation Services, ROME

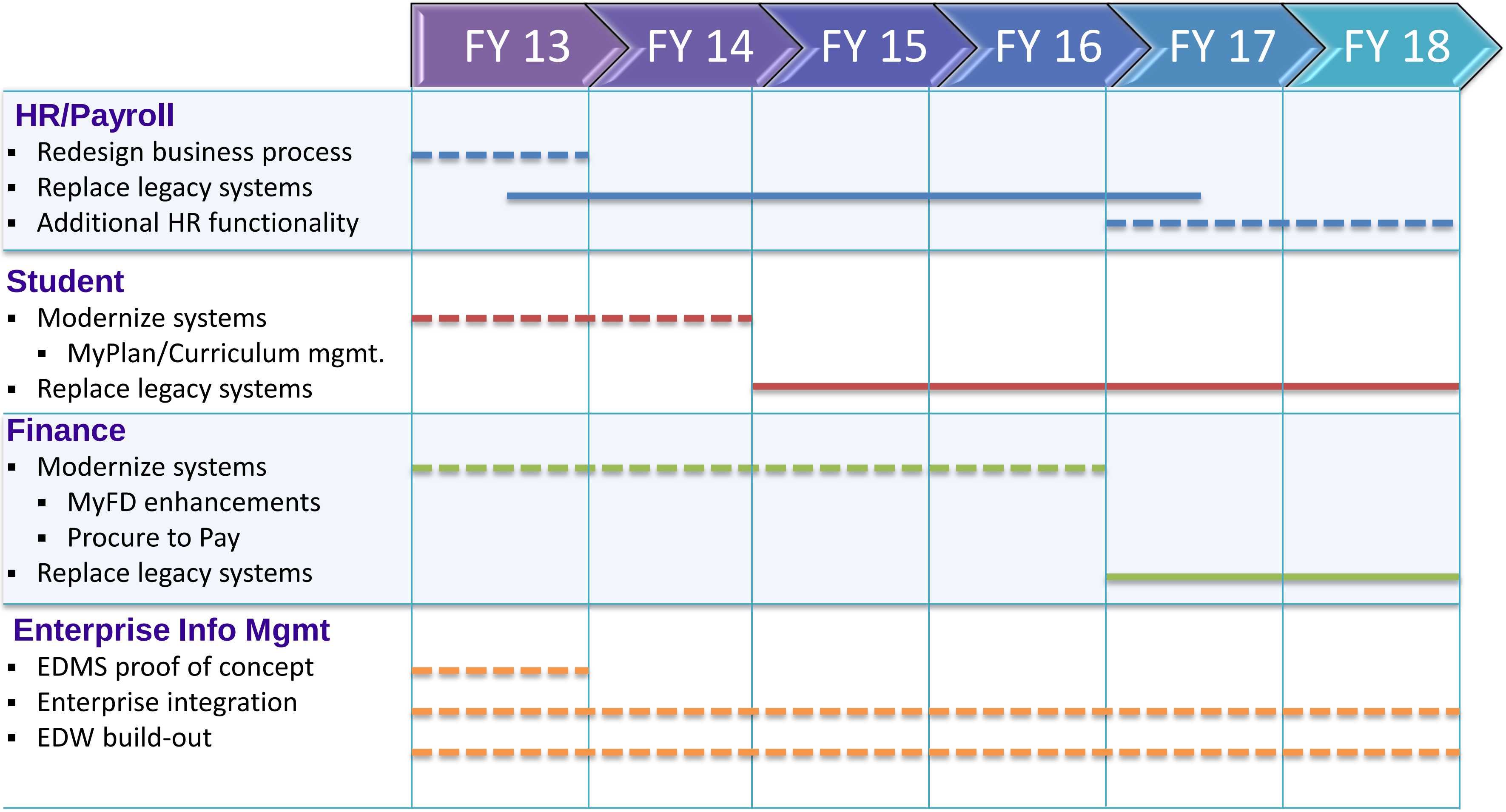
ID card, CAAMS, SIMS

Advancement

Advance

ReportWriter.Net

Roadmap Initiative Timeline



HR/Payroll
- Redesign business process
- Replace legacy systems
- Additional HR functionality

Student
- Modernize systems
  - MyPlan/Curriculum mgmt.
- Replace legacy systems

Finance
- Modernize systems
  - MyFD enhancements
  - Procure to Pay
- Replace legacy systems

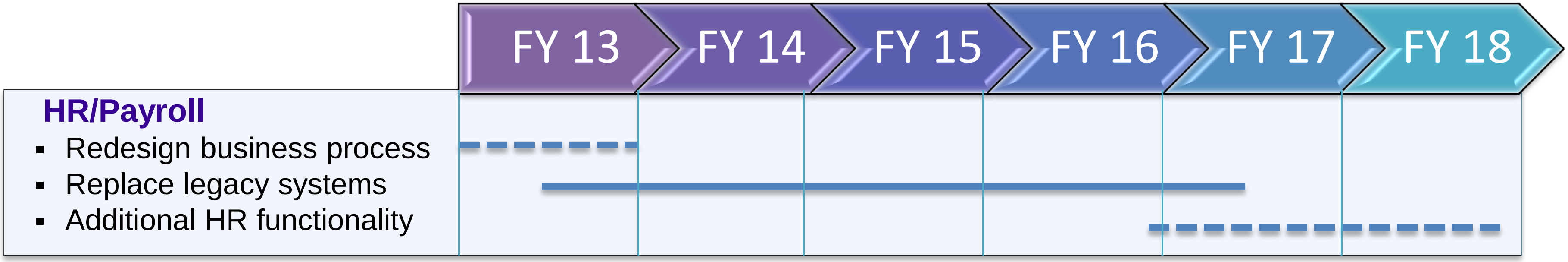
Enterprise Info Mgmt
- EDMS proof of concept
- Enterprise integration
- EDW build-out

━━━━━ Significant implementation effort

- - - - - - Incremental modernization

(Ongoing maintenance and production support not represented)

Roadmap Initiative Timeline
HR/Payroll



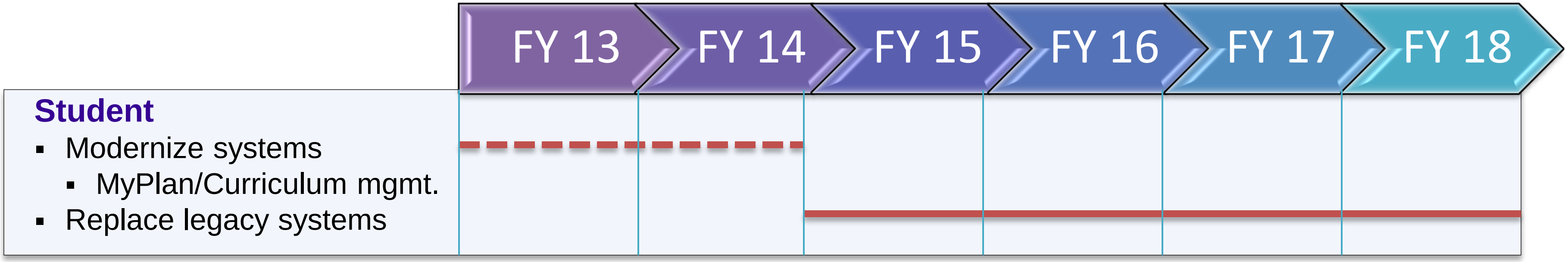
HR/Payroll
- Redesign business process
- Replace legacy systems
- Additional HR functionality

- Launch Business Process Redesign (Summer 2012 - Complete)
- Obtain state approvals (Summer 2012 - Complete)
- Issue RFP (Fall 2012)
- Assess bids, recommend vendor (Fall 2012 – Fall 2013)
- Seek Regents approval to issue contract (Fall 2013)

━━━ Significant implementation effort
- - - - Incremental modernization

(Ongoing maintenance and production support not represented)

Roadmap Initiative Timeline Student



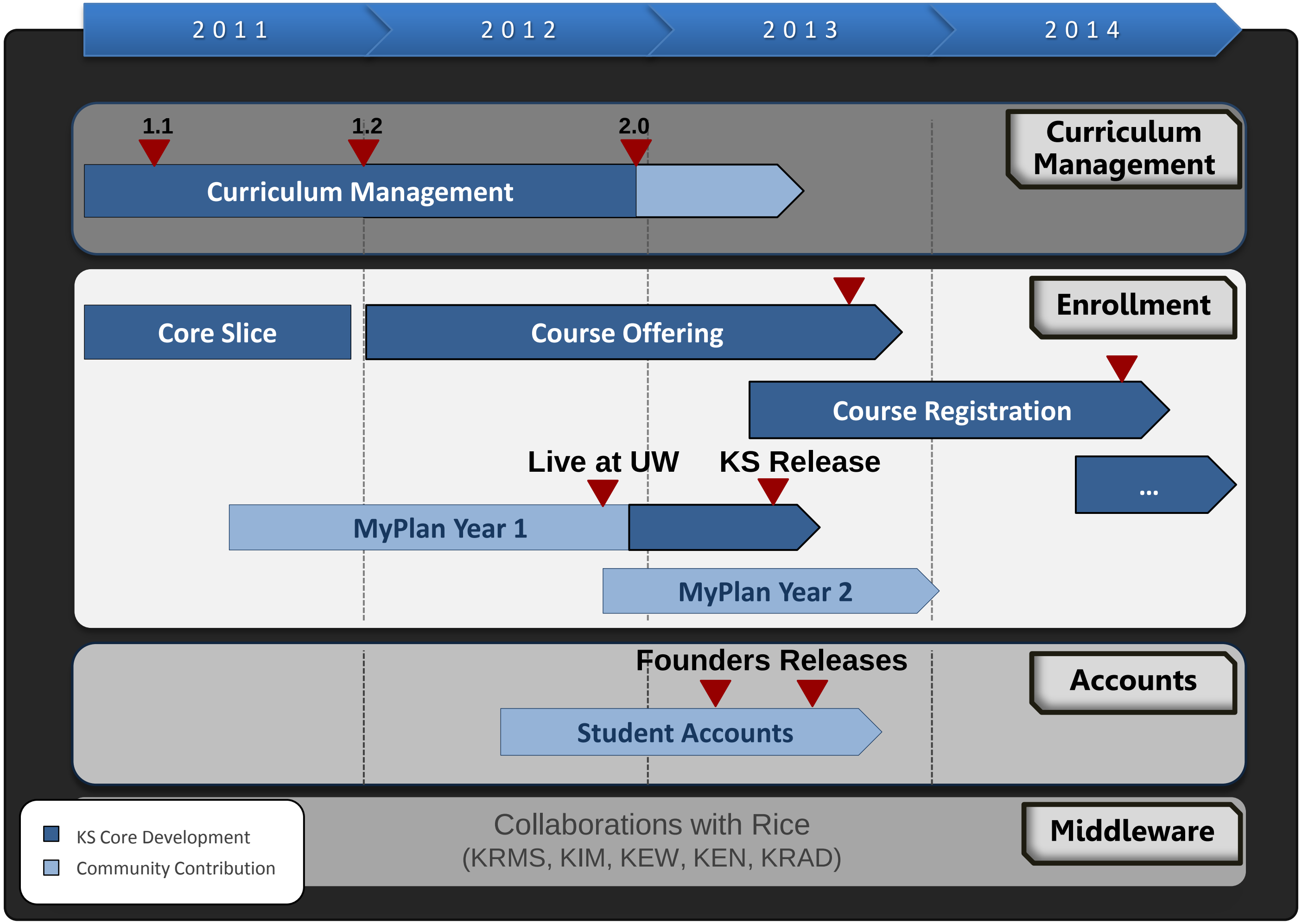
Student
- Modernize systems
  - MyPlan/Curriculum mgmt.
- Replace legacy systems

- Incrementally implement Kuali Student
- Continue to focus on modernizing the student experience
- Maintain legacy portfolio

—— Significant implementation effort
- - - - Incremental modernization

(Ongoing maintenance and production support not represented)

KS Delivery Strategy and Timeline



2011 2012 2013 2014

Curriculum Management

1.1 1.2 2.0

Curriculum Management

Enrollment

Core Slice

Course Offering

Course Registration

Live at UW

KS Release

MyPlan Year 1

MyPlan Year 2

…

Accounts

Founders Releases

Student Accounts

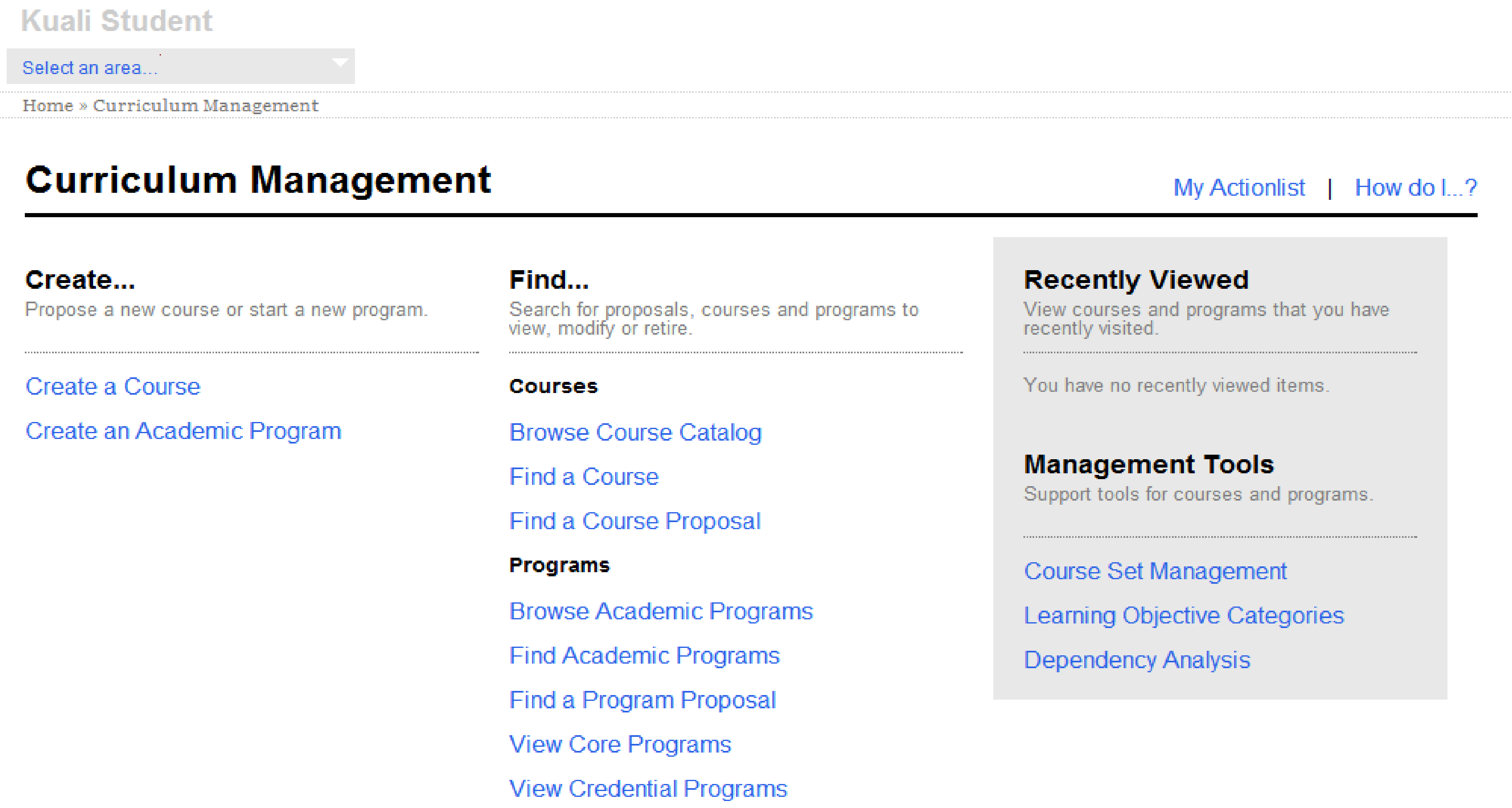
Middleware

Collaborations with Rice
(KRMS, KIM, KEW, KEN, KRAD)

■ KS Core Development
□ Community Contribution

Not on this KS roadmap: Financial Aid, Admissions, Scheduling, Program Audit

Curriculum Management



Kuali Student

Select an area...

Home » Curriculum Management

Curriculum Management

My Actionlist | How do I...?

Create...

Propose a new course or start a new program.

Create a Course

Create an Academic Program

Find...

Search for proposals, courses and programs to view, modify or retire.

Courses

Browse Course Catalog

Find a Course

Find a Course Proposal

Programs

Browse Academic Programs

Find Academic Programs

Find a Program Proposal

View Core Programs

View Credential Programs

Recently Viewed

View courses and programs that you have recently visited.

You have no recently viewed items.

Management Tools

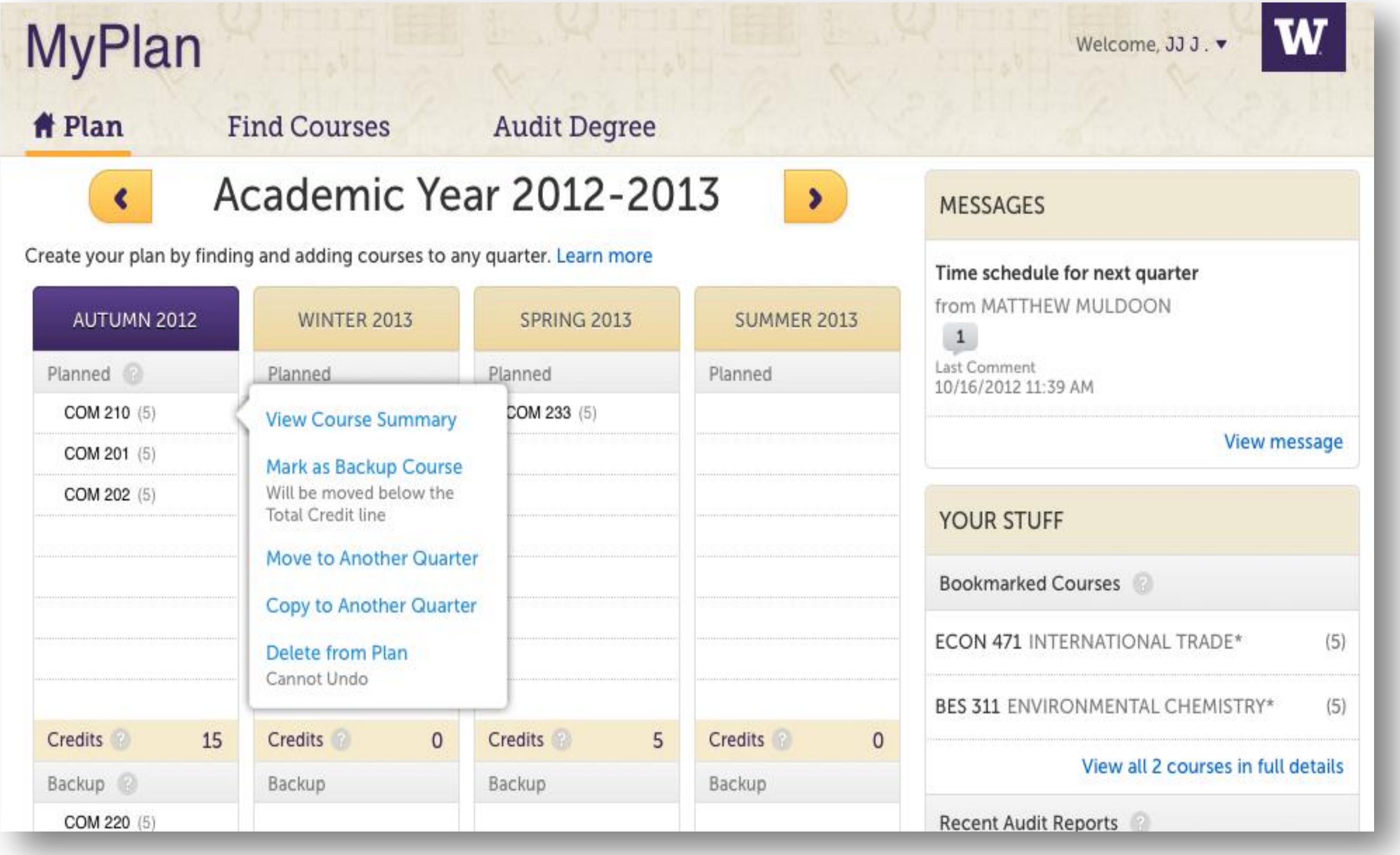
Support tools for courses and programs.

Course Set Management

Learning Objective Categories

Dependency Analysis

MyPlan: Academic Plan View


MyPlan
Welcome, JJ J . ▾
Plan
Find Courses
Audit Degree
View Course Summary
Mark as Backup Course
Will be moved below the Total Credit line
Move to Another Quarter
Copy to Another Quarter
Delete from Plan
Cannot Undo

Academic Year 2012-2013

Create your plan by finding and adding courses to any quarter. Learn more

AUTUMN 2012	WINTER 2013	SPRING 2013	SUMMER 2013
Planned	Planned	Planned	Planned
COM 210 (5)		COM 233 (5)	
COM 201 (5)			
COM 202 (5)			
Credits 15	Credits 0	Credits 5	Credits 0
Backup	Backup	Backup	Backup
COM 220 (5)			

MESSAGES

Time schedule for next quarter
from MATTHEW MULDOON
1
Last Comment
10/16/2012 11:39 AM

View message

YOUR STUFF

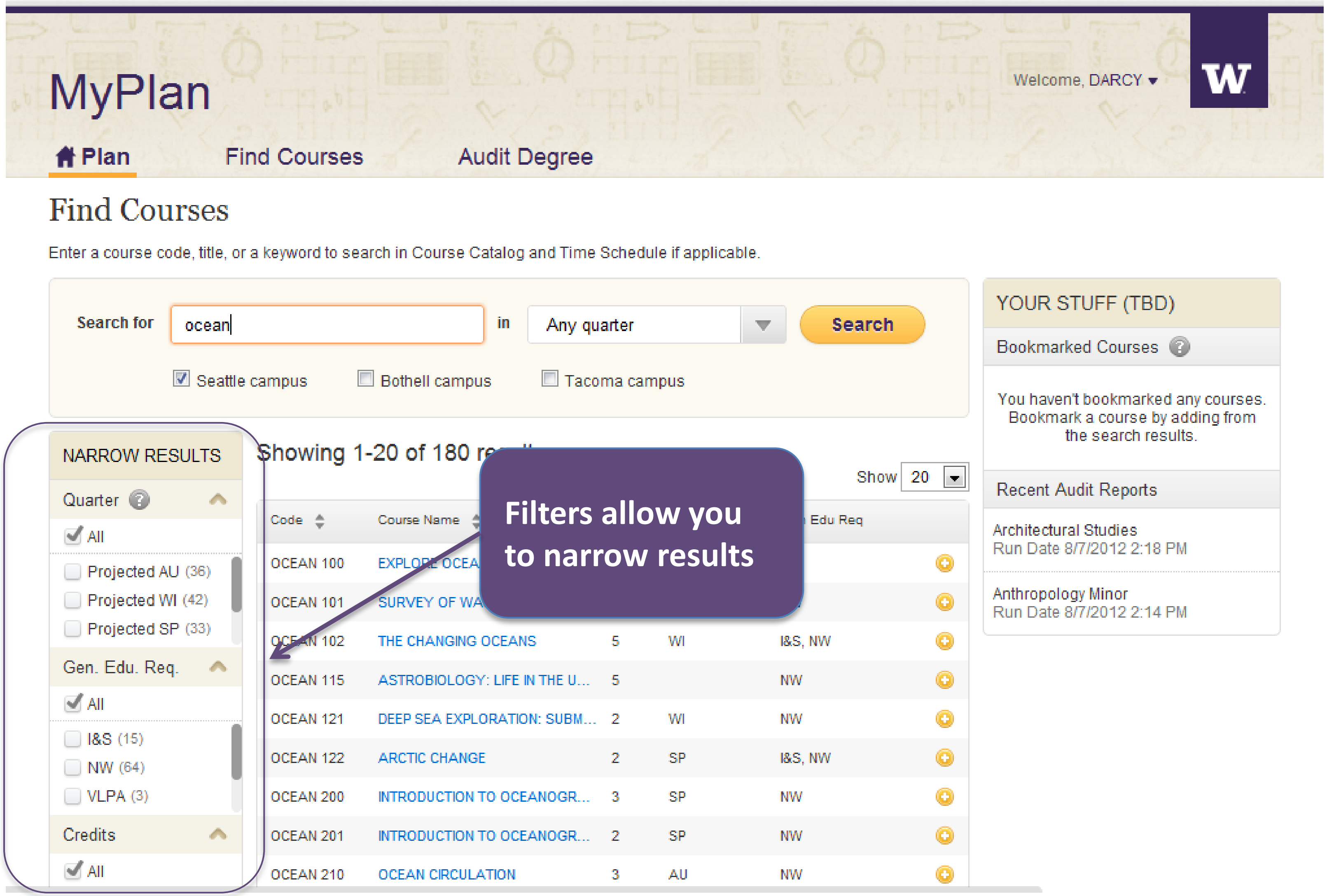
Bookmarked Courses

ECON 471 INTERNATIONAL TRADE*	(5)
BES 311 ENVIRONMENTAL CHEMISTRY*	(5)

View all 2 courses in full details

Recent Audit Reports

MyPlan: Find Courses



Find Courses

Enter a course code, title, or a keyword to search in Course Catalog and Time Schedule if applicable.

Search for: ocean in Any quarter

☑ Seattle campus ☐ Bothell campus ☐ Tacoma campus

NARROW RESULTS

Quarter
☑ All
☐ Projected AU (36)
☐ Projected WI (42)
☐ Projected SP (33)

Gen. Edu. Req.
☑ All
☐ I&S (15)
☐ NW (64)
☐ VLPA (3)

Credits
☑ All

Showing 1-20 of 180 re

Show 20

Code	Course Name			Edu Req
OCEAN 100	EXPLORE OCEA			
OCEAN 101	SURVEY OF WA			
OCEAN 102	THE CHANGING OCEANS	5	WI	I&S, NW
OCEAN 115	ASTROBIOLOGY: LIFE IN THE U...	5		NW
OCEAN 121	DEEP SEA EXPLORATION: SUBM...	2	WI	NW
OCEAN 122	ARCTIC CHANGE	2	SP	I&S, NW
OCEAN 200	INTRODUCTION TO OCEANOGR...	3	SP	NW
OCEAN 201	INTRODUCTION TO OCEANOGR...	2	SP	NW
OCEAN 210	OCEAN CIRCULATION	3	AU	NW

YOUR STUFF (TBD)

Bookmarked Courses

You haven't bookmarked any courses. Bookmark a course by adding from the search results.

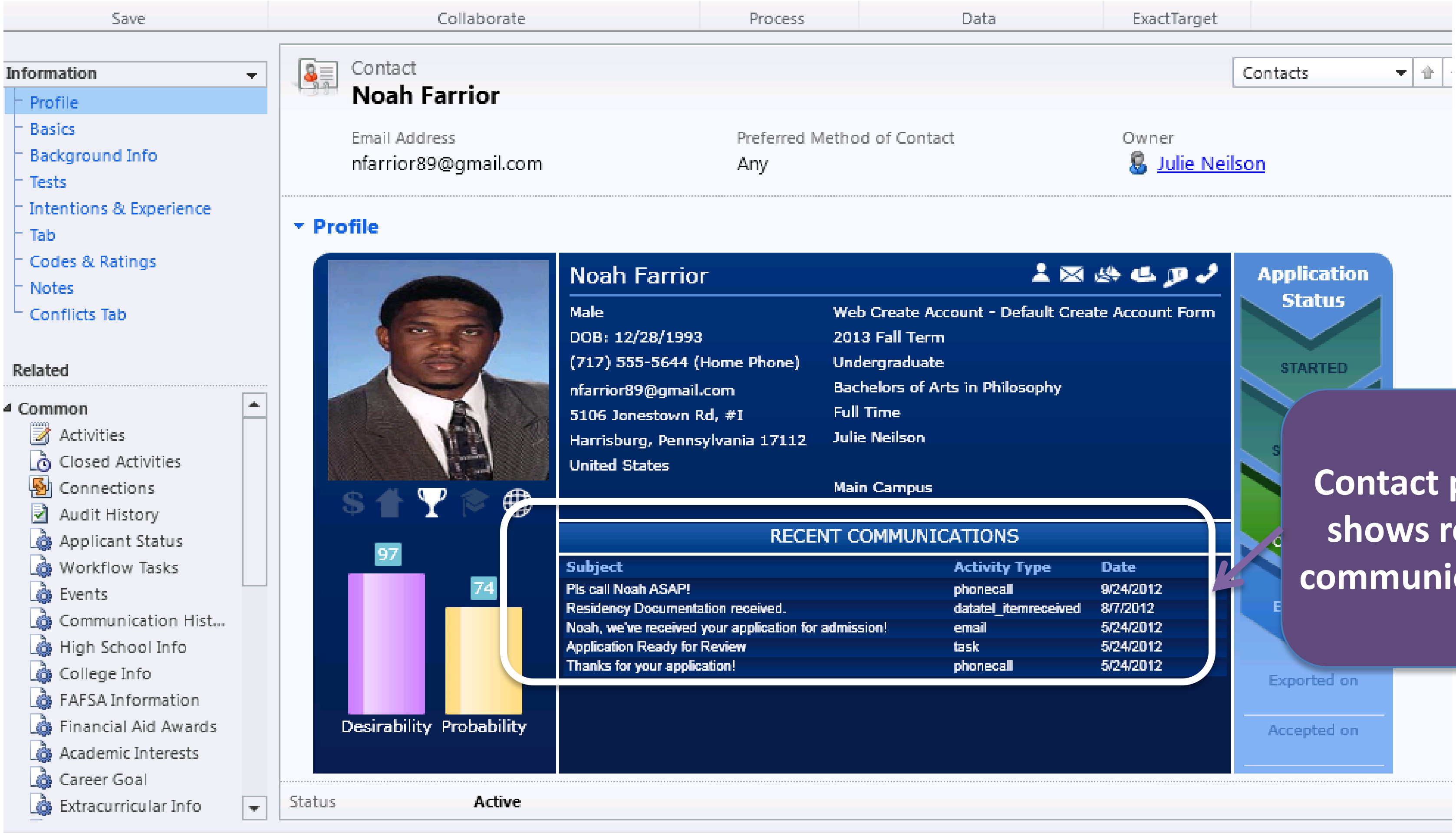
Recent Audit Reports

Architectural Studies
Run Date 8/7/2012 2:18 PM

Anthropology Minor
Run Date 8/7/2012 2:14 PM

Filters allow you to narrow results

Customer Relationship Management


Save
Collaborate
Process
Data
ExactTarget
Information
Profile
Basics
Background Info
Tests
Intentions & Experience
Tab
Codes & Ratings
Notes
Conflicts Tab
Related
Common
Activities
Closed Activities
Connections
Audit History
Applicant Status
Workflow Tasks
Events
Communication Hist...
High School Info
College Info
FAFSA Information
Financial Aid Awards
Academic Interests
Career Goal
Extracurricular Info
Contacts
Profile
97
74
Desirability
Probability
Application Status
STARTED
Exported on
Accepted on

Contact
Noah Farrior

Email Address: nfarrior89@gmail.com

Preferred Method of Contact: Any

Owner: Julie Neilson

Noah Farrior

Male
DOB: 12/28/1993
(717) 555-5644 (Home Phone)
nfarrior89@gmail.com
5106 Jonestown Rd, #I
Harrisburg, Pennsylvania 17112
United States

Web Create Account - Default Create Account Form
2013 Fall Term
Undergraduate
Bachelors of Arts in Philosophy
Full Time
Julie Neilson

Main Campus

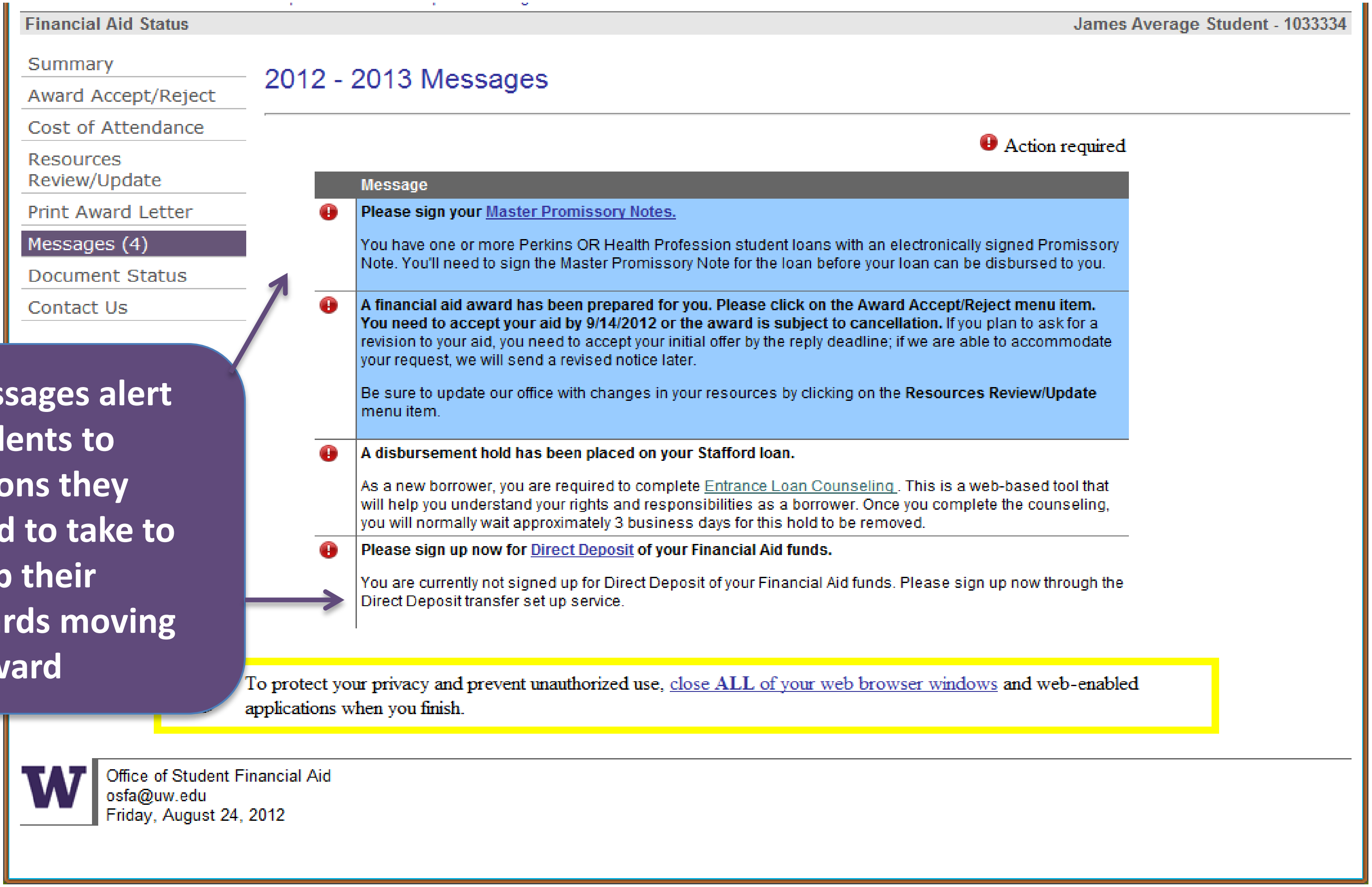
RECENT COMMUNICATIONS

Subject	Activity Type	Date
Pls call Noah ASAP!	phonecall	9/24/2012
Residency Documentation received.	datatel_itemreceived	8/7/2012
Noah, we've received your application for admission!	email	5/24/2012
Application Ready for Review	task	5/24/2012
Thanks for your application!	phonecall	5/24/2012

Status: Active

Contact profile shows recent communications

Financial Aid Messages
Student Self-Service



2012 - 2013 Messages

❗ Action required

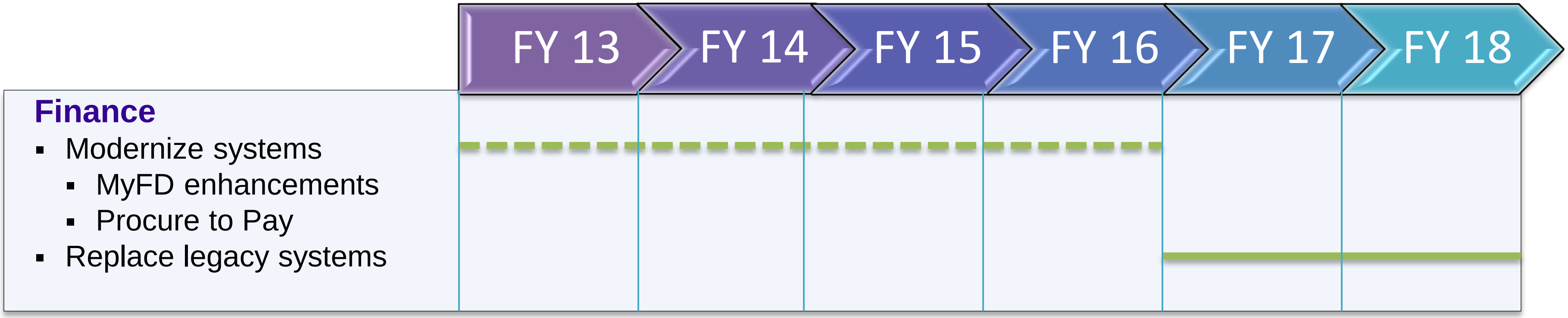
	Message
❗	**Please sign your Master Promissory Notes.** You have one or more Perkins OR Health Profession student loans with an electronically signed Promissory Note. You'll need to sign the Master Promissory Note for the loan before your loan can be disbursed to you.
❗	**A financial aid award has been prepared for you. Please click on the Award Accept/Reject menu item. You need to accept your aid by 9/14/2012 or the award is subject to cancellation.** If you plan to ask for a revision to your aid, you need to accept your initial offer by the reply deadline; if we are able to accommodate your request, we will send a revised notice later. Be sure to update our office with changes in your resources by clicking on the **Resources Review/Update** menu item.
❗	**A disbursement hold has been placed on your Stafford loan.** As a new borrower, you are required to complete Entrance Loan Counseling . This is a web-based tool that will help you understand your rights and responsibilities as a borrower. Once you complete the counseling, you will normally wait approximately 3 business days for this hold to be removed.
❗	**Please sign up now for Direct Deposit of your Financial Aid funds.** You are currently not signed up for Direct Deposit of your Financial Aid funds. Please sign up now through the Direct Deposit transfer set up service.

To protect your privacy and prevent unauthorized use, close ALL of your web browser windows and web-enabled applications when you finish.

Office of Student Financial Aid
osfa@uw.edu
Friday, August 24, 2012

Messages alert students to actions they need to take to keep their awards moving forward

Roadmap Initiative Timeline
Finance



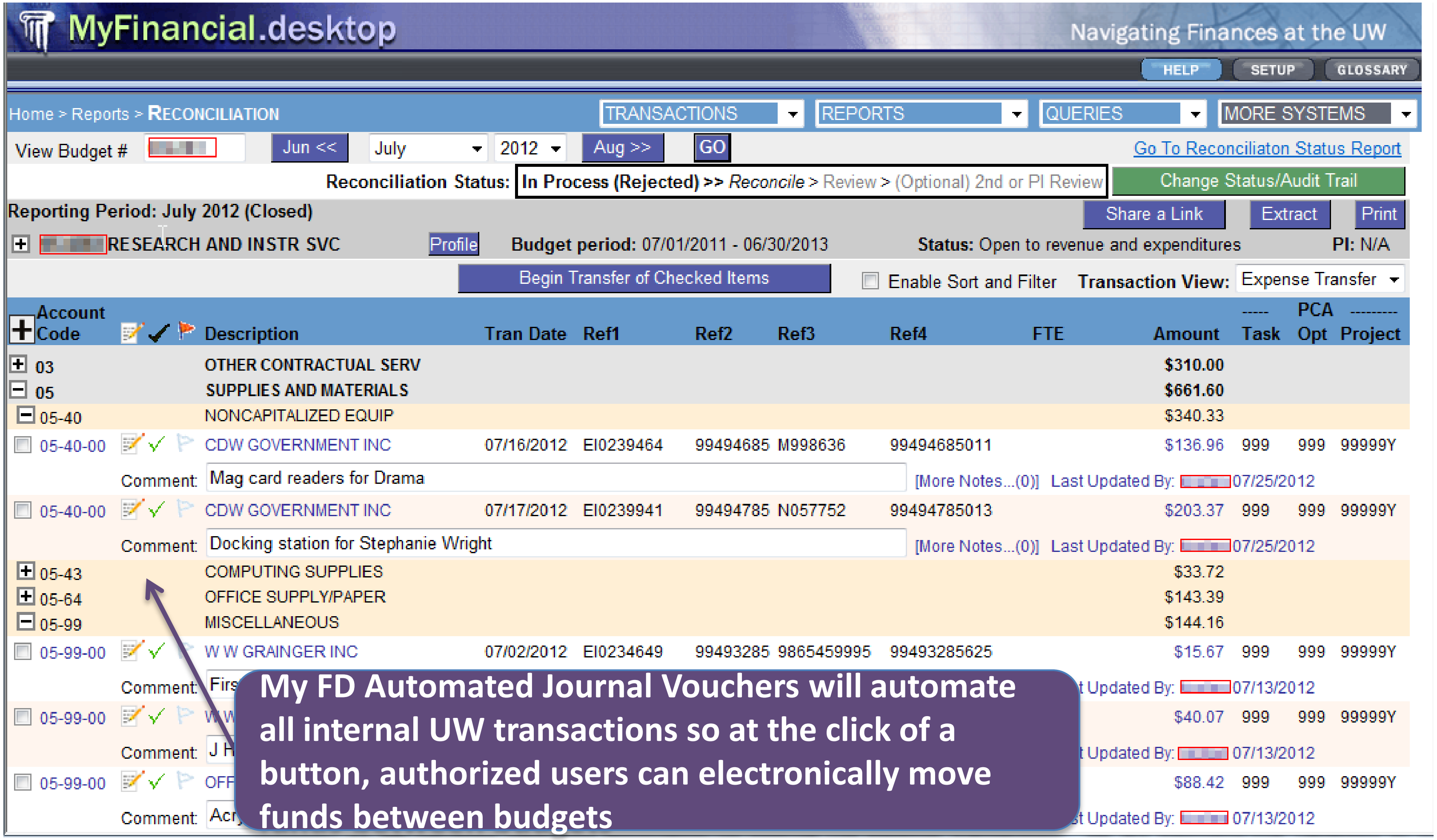
Finance
- Modernize systems
  - MyFD enhancements
  - Procure to Pay
- Replace legacy systems

- Continue to incrementally modernize
- Focus on efficiencies for campus and compliance
- Maintain legacy portfolio

——— Significant implementation effort
- - - - Incremental modernization

(Ongoing maintenance and production support not represented)

My Financial Desktop Automated Journal Vouchers



Home > Reports > RECONCILIATION

View Budget # [redacted] Jun << July 2012 Aug >> GO

Go To Reconciliaton Status Report

Reconciliation Status: **In Process (Rejected) >>** *Reconcile* > Review > (Optional) 2nd or PI Review

Change Status/Audit Trail

Reporting Period: July 2012 (Closed)

Share a Link Extract Print

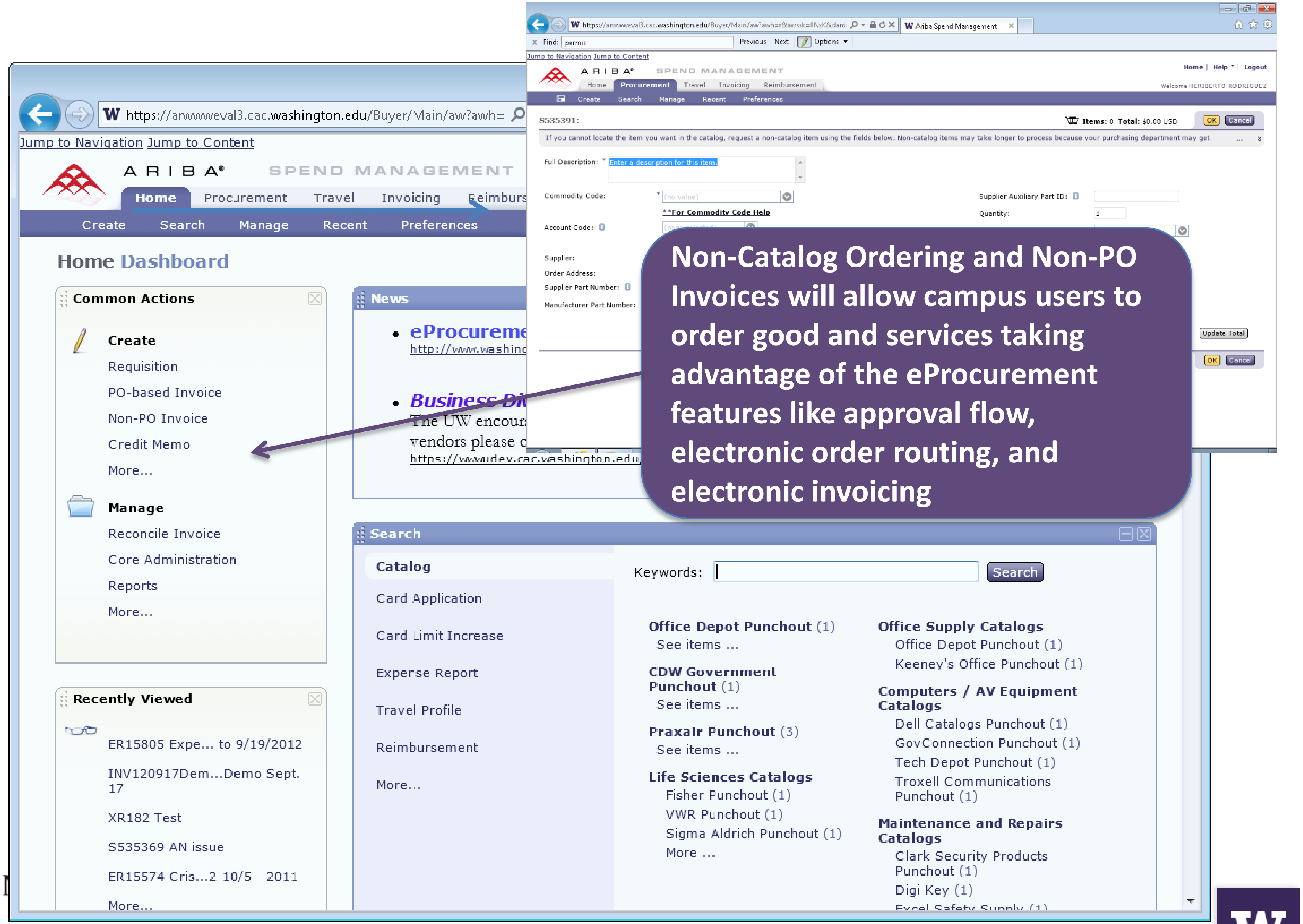
[redacted] RESEARCH AND INSTR SVC Profile **Budget period:** 07/01/2011 - 06/30/2013 **Status:** Open to revenue and expenditures **PI:** N/A

Begin Transfer of Checked Items ☐ Enable Sort and Filter **Transaction View:** Expense Transfer

Account Code		Description	Tran Date	Ref1	Ref2	Ref3	Ref4	FTE	Amount	Task	PCA Opt	Project
03		OTHER CONTRACTUAL SERV							$310.00			
05		SUPPLIES AND MATERIALS							$661.60			
05-40		NONCAPITALIZED EQUIP							$340.33			
☐ 05-40-00	✓	CDW GOVERNMENT INC	07/16/2012	EI0239464	99494685	M998636	99494685011		$136.96	999	999	99999Y
	Comment:	Mag card readers for Drama					[More Notes...(0)]	Last Updated By: [redacted] 07/25/2012				
☐ 05-40-00	✓	CDW GOVERNMENT INC	07/17/2012	EI0239941	99494785	N057752	99494785013		$203.37	999	999	99999Y
	Comment:	Docking station for Stephanie Wright					[More Notes...(0)]	Last Updated By: [redacted] 07/25/2012				
05-43		COMPUTING SUPPLIES							$33.72			
05-64		OFFICE SUPPLY/PAPER							$143.39			
05-99		MISCELLANEOUS							$144.16			
☐ 05-99-00	✓	W W GRAINGER INC	07/02/2012	EI0234649	99493285	9865459995	99493285625		$15.67	999	999	99999Y
	Comment:	Firs						t Updated By: [redacted] 07/13/2012				
☐ 05-99-00	✓	W W							$40.07	999	999	99999Y
	Comment:	J H						t Updated By: [redacted] 07/13/2012				
☐ 05-99-00	✓	OFF							$88.42	999	999	99999Y
	Comment:	Acr						t Updated By: [redacted] 07/13/2012				

My FD Automated Journal Vouchers will automate all internal UW transactions so at the click of a button, authorized users can electronically move funds between budgets

Procure to Pay



https://arwwweval3.cac.washington.edu/Buyer/Main/aw?awh=

Jump to Navigation Jump to Content

ARIBA® SPEND MANAGEMENT

Home Procurement Travel Invoicing Reimburs

Create Search Manage Recent Preferences

Home Dashboard

Common Actions

Create
- Requisition
- PO-based Invoice
- Non-PO Invoice
- Credit Memo
- More...

Manage
- Reconcile Invoice
- Core Administration
- Reports
- More...

Recently Viewed
- ER15805 Expe... to 9/19/2012
- INV120917Dem...Demo Sept. 17
- XR182 Test
- S535369 AN issue
- ER15574 Cris...2-10/5 - 2011
- More...

News
- eProcureme
  http://www.washinc
- *Business Di*
  The UW encour
  vendors please c
  https://wwudev.cac.washington.edu,

Search

Catalog
Card Application
Card Limit Increase
Expense Report
Travel Profile
Reimbursement
More...

Keywords: Search

Office Depot Punchout (1)
See items ...

CDW Government Punchout (1)
See items ...

Praxair Punchout (3)
See items ...

Life Sciences Catalogs
Fisher Punchout (1)
VWR Punchout (1)
Sigma Aldrich Punchout (1)
More ...

Office Supply Catalogs
Office Depot Punchout (1)
Keeney's Office Punchout (1)

Computers / AV Equipment Catalogs
Dell Catalogs Punchout (1)
GovConnection Punchout (1)
Tech Depot Punchout (1)
Troxell Communications Punchout (1)

Maintenance and Repairs Catalogs
Clark Security Products Punchout (1)
Digi Key (1)

https://arwwweval3.cac.washington.edu/Buyer/Main/aw?awh=r&awssk=0NxK&dard: Ariba Spend Management

Find: permis Previous Next Options

Jump to Navigation Jump to Content

ARIBA® SPEND MANAGEMENT Home | Help | Logout

Home Procurement Travel Invoicing Reimbursement Welcome HERIBERTO RODRIGUEZ

Create Search Manage Recent Preferences

S535391: Items: 0 Total: $0.00 USD OK Cancel

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process because your purchasing department may get ...

Full Description: * Enter a description for this item.

Commodity Code: * (no value)

**For Commodity Code Help

Account Code:

Supplier:

Order Address:

Supplier Part Number:

Manufacturer Part Number:

Supplier Auxiliary Part ID:

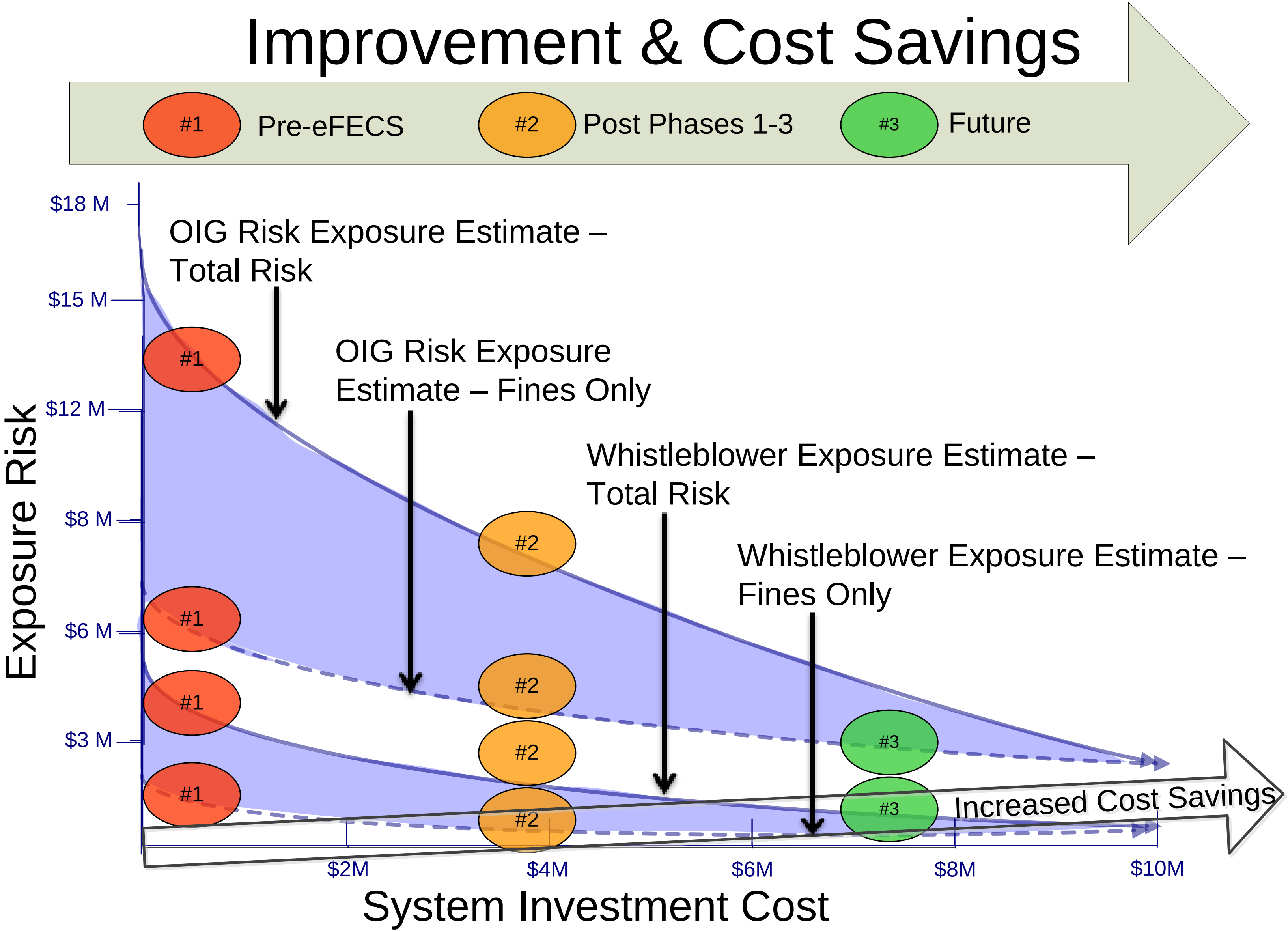
Quantity: 1

Update Total

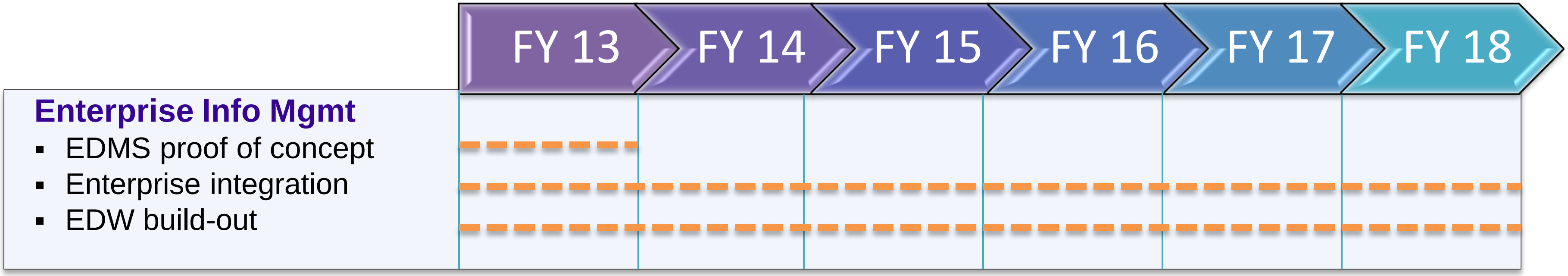
OK Cancel

Non-Catalog Ordering and Non-PO Invoices will allow campus users to order good and services taking advantage of the eProcurement features like approval flow, electronic order routing, and electronic invoicing

eFECS Exposure Risk Improvement & Cost Savings



Roadmap Initiative Timeline
Enterprise Information Management



Enterprise Info Mgmt
- EDMS proof of concept
- Enterprise integration
- EDW build-out

- Critical to our administrative systems replacement strategy
- Plays a key role in our data integration strategy and enterprise reporting

━━━━━━━ Significant implementation effort
- - - - - - - Incremental modernization

(Ongoing maintenance and production support not represented)

Enterprise Document Management

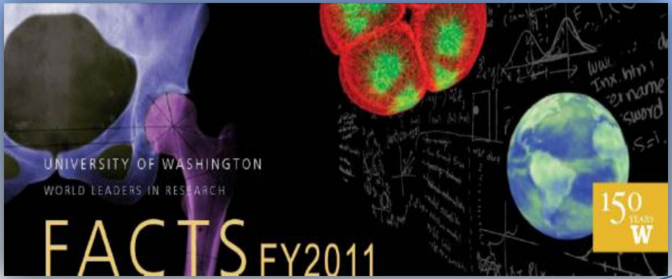
Store Online

View Online

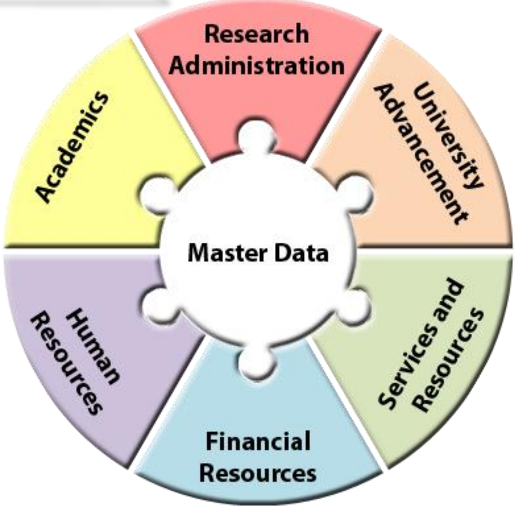
Process Online

Enterprise Data Warehouse

Expanding UW's data assets


UNIVERSITY OF WASHINGTON
WORLD LEADERS IN RESEARCH
FACTS FY2011
150 YEARS W

Currently focused on new research administration data



Research Administration

University Advancement

Services and Resources

Financial Resources

Human Resources

Academics

Master Data

Certified, institution-wide definitions let us speak one language

Common Data Definitions

How many students attended UW last quarter?

Registered Students?

Enrolled Students?

Enrolled as of Census Day?

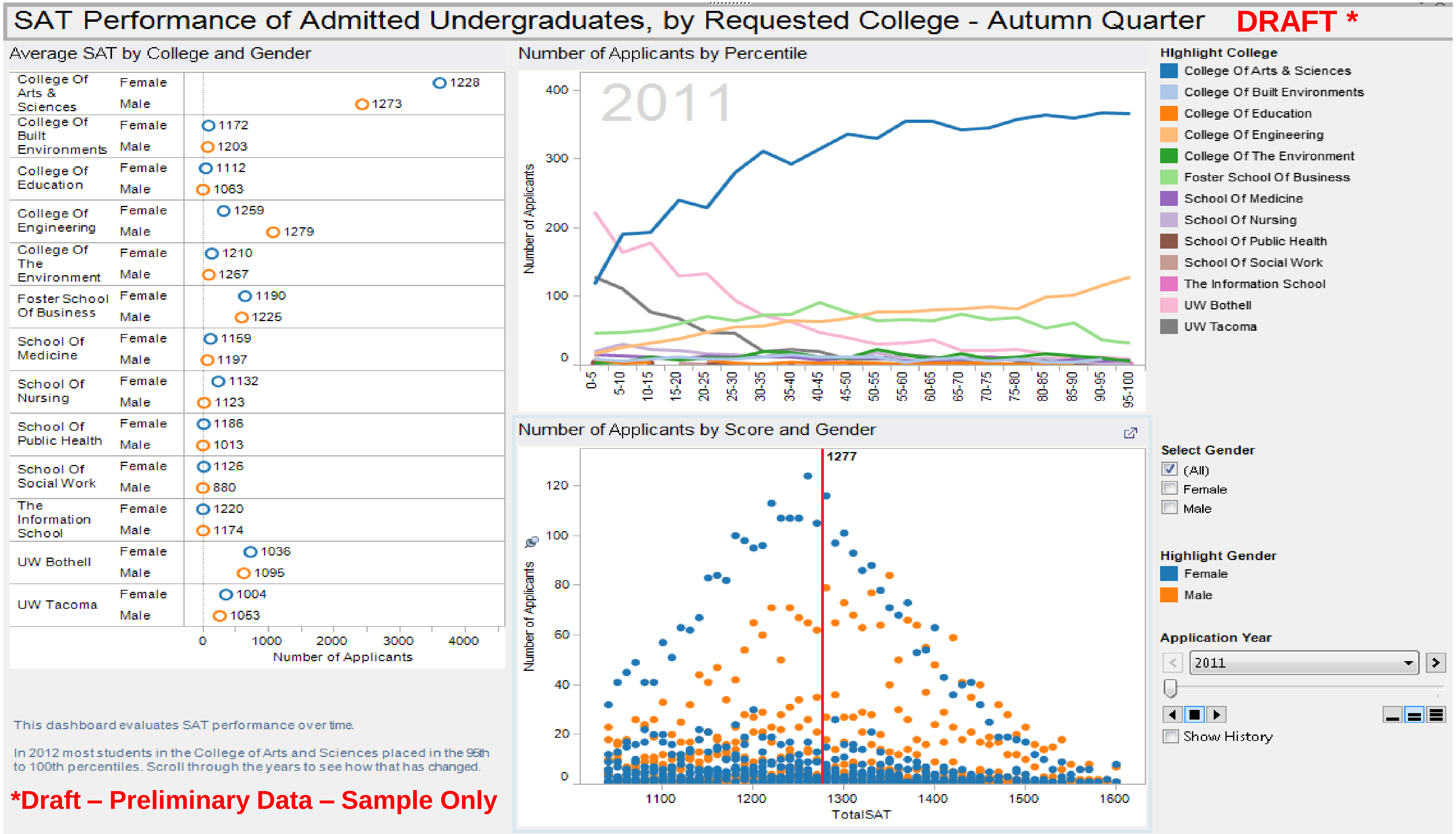
Admitted Students?

Fee-paying Students?

Precision is required in questions, and in term definitions

Business Intelligence

To deliver better information to decision makers


SAT Performance of Admitted Undergraduates, by Requested College - Autumn Quarter
DRAFT *
Average SAT by College and Gender
College Of Arts & Sciences
Female
1228
Male
1273
College Of Built Environments
Female
1172
Male
1203
College Of Education
Female
1112
Male
1063
College Of Engineering
Female
1259
Male
1279
College Of The Environment
Female
1210
Male
1267
Foster School Of Business
Female
1190
Male
1225
School Of Medicine
Female
1159
Male
1197
School Of Nursing
Female
1132
Male
1123
School Of Public Health
Female
1186
Male
1013
School Of Social Work
Female
1126
Male
880
The Information School
Female
1220
Male
1174
UW Bothell
Female
1036
Male
1095
UW Tacoma
Female
1004
Male
1053
0
1000
2000
3000
4000
Number of Applicants
Number of Applicants by Percentile
2011
Number of Applicants
400
300
200
100
0
0-5
5-10
10-15
15-20
20-25
25-30
30-35
35-40
40-45
45-50
50-55
55-60
60-65
65-70
70-75
75-80
80-85
85-90
90-95
95-100
Number of Applicants by Score and Gender
1277
Number of Applicants
120
100
80
60
40
20
0
1100
1200
1300
1400
1500
1600
TotalSAT
Highlight College
College Of Arts & Sciences
College Of Built Environments
College Of Education
College Of Engineering
College Of The Environment
Foster School Of Business
School Of Medicine
School Of Nursing
School Of Public Health
School Of Social Work
The Information School
UW Bothell
UW Tacoma
Highlight Gender
Female
Male
Show History

Select Gender
☑ (All)
☐ Female
☐ Male

Application Year
2011

This dashboard evaluates SAT performance over time.

In 2012 most students in the College of Arts and Sciences placed in the 95th to 100th percentiles. Scroll through the years to see how that has changed.

***Draft – Preliminary Data – Sample Only**

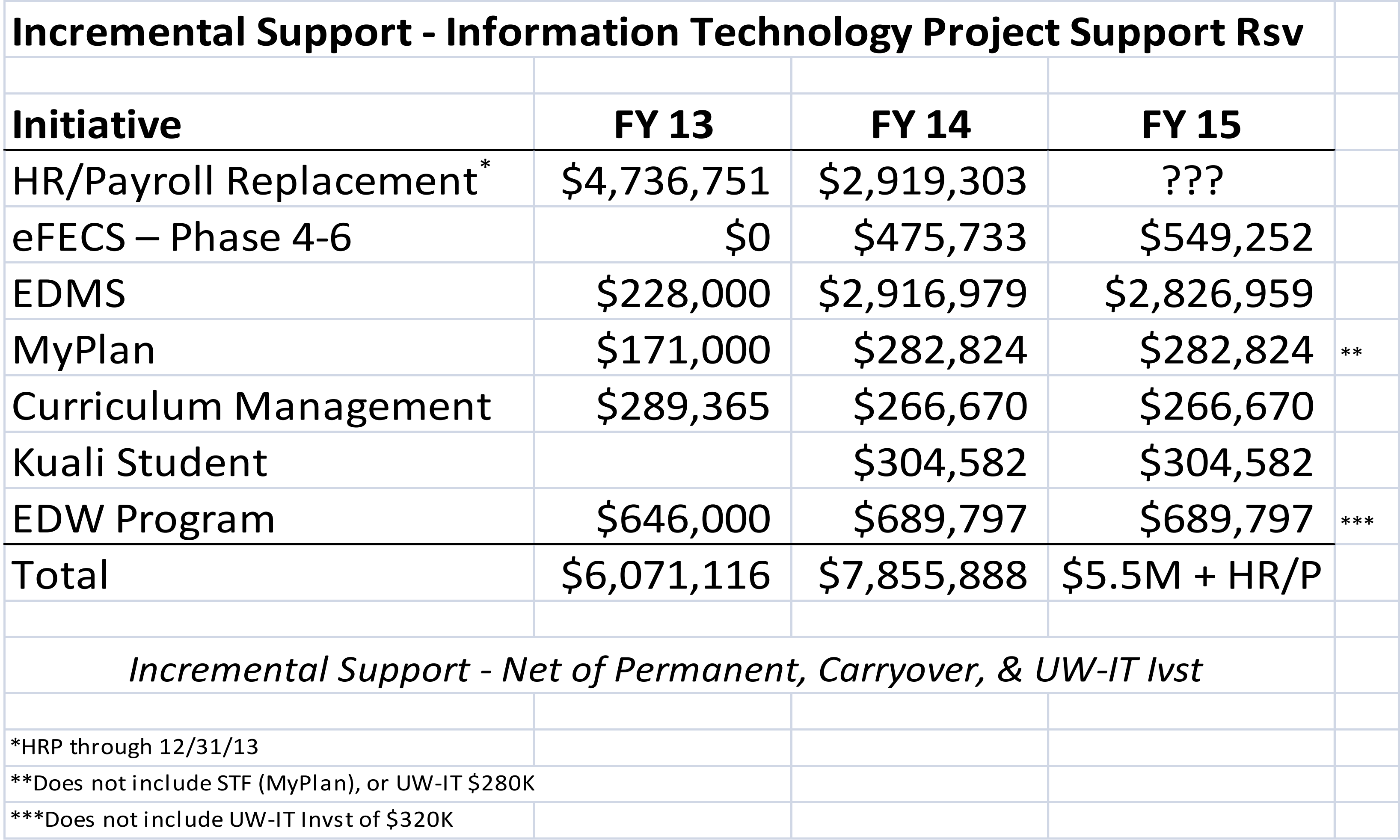
Information Technology Project Support Reserve

Request for FY 2014

Information Technology Project Support Reserve

- Established by Office of Planning & Budgeting to provide funding for modernization initiatives in administrative systems and information management
- Funding level of reserve is reviewed each year as part of the UW's annual budget process
- Supports initiatives currently in planning and implementation stage

Request - Incremental Support



Incremental Support - Information Technology Project Support Rsv

Initiative	**FY 13**	**FY 14**	**FY 15**	
HR/Payroll Replacement*	$4,736,751	$2,919,303	???	
eFECS – Phase 4-6	$0	$475,733	$549,252	
EDMS	$228,000	$2,916,979	$2,826,959	
MyPlan	$171,000	$282,824	$282,824	**
Curriculum Management	$289,365	$266,670	$266,670	
Kuali Student		$304,582	$304,582	
EDW Program	$646,000	$689,797	$689,797	***
Total	$6,071,116	$7,855,888	$5.5M + HR/P	

Incremental Support - Net of Permanent, Carryover, & UW-IT Ivst

*HRP through 12/31/13

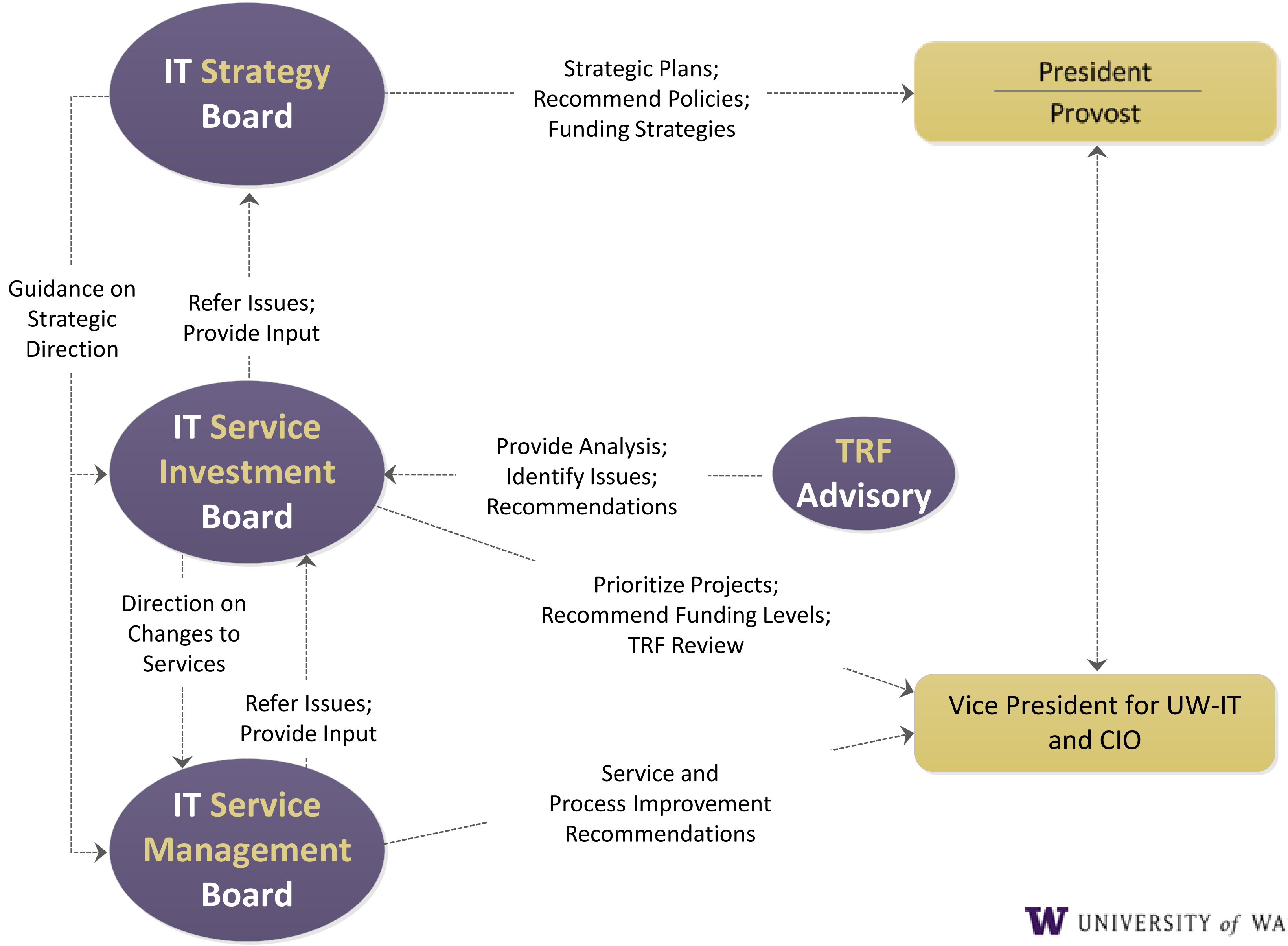
**Does not include STF (MyPlan), or UW-IT $280K

***Does not include UW-IT Invst of $320K

Questions & Discussion

Appendix

Information Technology (IT) Governance



IT Strategy Board

Strategic Plans; Recommend Policies; Funding Strategies

President

Provost

Guidance on Strategic Direction

Refer Issues; Provide Input

IT Service Investment Board

Provide Analysis; Identify Issues; Recommendations

TRF Advisory

Prioritize Projects; Recommend Funding Levels; TRF Review

Direction on Changes to Services

Refer Issues; Provide Input

Vice President for UW-IT and CIO

IT Service Management Board

Service and Process Improvement Recommendations

UNIVERSITY of WASHINGTON

IT Governance Membership

IT Strategy Board

Thomas Baillie
School of Pharmacy
Chair

Thomas Daniel
Biology

Gerald Baldasty
Academic and Student Affairs

Paul Jenny
Office of Planning & Budgeting

James Fine
UW Medicine

Edward Lazowska
Computer Science & Engineering

Mary Lidstrom
Office of Research

John Slattery
School of Medicine

Kellye Testy
School of Law

Kelli Trosvig
UW Information Technology

V'Ella Warren
Finance & Facilities

IT Service Investment Board

Kellye Testy
School of Law
Chair

David Anderson
Health Sciences Administration

Susan Astley
Epidemiology & Pediatrics

Susan Camber
Financial Management

Walt Dryfoos
University Advancement

Vikram Jandhyala
College of Engineering

Mary Fran Joseph
UW School of Medicine

Stephen Majeski
College of Arts & Sciences

Harlan Patterson
UW Tacoma

Liz Shirley
UW Medicine

Gary Quarfoth
Office of Planning & Budgeting

Kelli Trosvig
UW Information Technology

Bill Ferris, Ex-officio
UW Information Technology

TRF Advisory Committee

Bill Ferris
UW Information Technology
Co-Chair

Tom Sparks
College of Engineering
Co-Chair

Cristi Chapman
Management Accounting & Analysis

David Green
School of Medicine

Amy Floit
Office of Planning & Budgeting

Jonathan Franklin
School of Law

Paul Ishizuka
UW Medicine

Linda Rose Nelson
College of Arts & Sciences

IT Service Management Board

Scott Barker
Information School
Chair

Mark Baratta
College of Built Environments

Kate Bouchard
Foster School of Business

John Drew
The Graduate School

Jean Garber
School of Dentistry

Brad Greer
UW Information Technology

TBA
UW Medicine IT Services

Erik Lundberg
UW Information Technology

Cynthia Caci
College of Arts & Sciences

Gary Pedersen
Chemistry

Barb Prentiss
School of Medicine

Roland Rivera
UW Information Technology

Bill Shirey
UW Information Technology

Tom Sparks
College of Engineering

Karalee Woody
UW Information Technology

Betsy Tippens
UW Bothell

Mary Mulvihill, Ex-officio
UW Information Technology

UNIVERSITY *of* WASHINGTON

Updated 01.09.13

IT Service Investment Board Charge

- Review services provided by UW Information Technology (UW-IT)
- Conduct annual review of Technology Recharge Fee (TRF) and recommend changes as needed
- Review major UW-IT projects and make recommendations about investment priorities