A Look Ahead at UC Davis Strategic Technology Plans

ADMAN 2017 Annual Conference
Presenters

• Carolyn Nordstrom, Executive Advisor to the CIO for Strategy and Planning
  Information and Educational Technology

• Radhika Prabhu, Executive Director for Administrative IT,
  Finance, Operations and Administration

• Doug Berman, Associate CIO for Enterprise Student Applications,
  Information and Educational Technology

• Todd VanZandt, UC Davis Canvas Program Manager, Academic Technology Services
  Information and Educational Technology
You can’t stop the waves
BUT
You can learn to surf.

jonathan kabat-zinn
Guiding Principles for Change
The CIOs Governance Vision

**IT Governance Objectives**

To create and continually refine a shared vision of IT strategy and principles among the University’s academic, administrative, and IT decision makers.

To facilitate robust communication among the University’s academic and administrative units and the central and decentralized Information Technology enablers.

To evaluate campus-wide technology opportunities and advocate for investment in the highest priority projects with a unified voice.

To work in close coordination with IT partners to deliver the highest quality implementation of technology solutions and services to meet the University’s mission and strategic plans, wherever those solutions may be supported most effectively and efficiently.
CIO’s Strategic Advisory Council

• **Advise** in the development of campus-wide IT strategy and principles.
• **Identify the business needs** of the UC Davis community that may be addressed through technology.
• **Assess IT risks** and advise regarding risk mitigation strategies, business continuity plans, and contingency plans.
• **Assess the effectiveness and efficiency** of currently available services and applications and make recommendations for improvements, additions, or retirement of outdated or duplicative services and applications.
• **Champion Communication, Cooperation, and Collaboration** among IT stakeholders at UC Davis.
• **Advocate** to improve alignment of IT investments with University strategy and goals and the overall IT strategy and principles.
• **Assess opportunities** for emerging technologies and provide strategic direction regarding priorities for investment.
FINANCE, OPERATIONS & ADMINISTRATION (FOA) IT PROJECTS

Radhika Prabhu
Director, FOA IT
Changing IT Landscape

Business process realignment and drivers
- Demand for agility and user centric technology
- Compliance and security requirements
- More Vended Apps
- Cloud Movement

Need for Integration & light-weight applications
- Manage data as asset (cloud or on premise)
- Product support/life cycle mgmt.
- Security & risk planning
- Legacy application analysis

Build/Buy/Borrow analysis
- Strong business-IT partnership
- Developing new skillsets and technologies
UCPath (System-wide Program)

Drivers & Business Value

• UC’s Personnel/Payroll System (PPS) is 35 years old and difficult to use, with 11 versions each with differing data definitions and policies. UC employees perform significant amount of manual calculations, workarounds, corrections, and paper processing to run payroll and manage HR for UC faculty and staff.

• Opportunity for Campus and UCDH to have common HR processes and technologies – common HRIS with Talent Acquisition Management and ePerformance modules

• Review and redesign of business processes for UCPath provides an opportunity for reviewing and optimizing the current operating model

Technology

• PeopleSoft HCM 9.2 Software as a Service (single instance for all UC locations)

## UCPath (Process & Roles)

### Examples....

<table>
<thead>
<tr>
<th>Path Center</th>
<th>Locations</th>
<th>Employee/Manager Self-Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production of payroll checks &amp; W-2s</td>
<td>Position Management</td>
<td>Manage direct deposit</td>
</tr>
<tr>
<td>Garnishments</td>
<td>Recruitments</td>
<td>Choose benefit package</td>
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<tr>
<td>Benefits Support</td>
<td>Local labor and employee relations</td>
<td>Change a beneficiary</td>
</tr>
<tr>
<td>Mass update of records</td>
<td>Academic review process</td>
<td>Update personal information</td>
</tr>
<tr>
<td>Systemwide reporting</td>
<td>Time and attendance submissions</td>
<td>Leave administration</td>
</tr>
</tbody>
</table>

UCPath (Systemwide Project)

Timeline

Live Nov 2015

December 2017

TBD (2018)

TBD (2018)

Drivers & Business Value

- Utilize industry leader with many existing supplier partners and mature platform
- User centric application with robust functionality
- Utilize UCOP eCOE for administrative and content enablement efficiencies
- Integrated system for procurement and payment processes

Technology - Jaggaer (Sciquest) Software as a Service solution

Phase 1 (Live Nov 2016)
- Catalog shopping
- Integration with KFS
- Roles management

Phase 2 (Planning Underway)
- Ability to procure non-catalog items
- Service procurement
- Better spend to pay

Drivers & Business Value

Systems solution to assist with ensuring budget and financial managers:

• Are informed by appropriate, accurate and timely data;
• Can better coordinate financial information across units;
• Use streamlined and consistent mechanisms to conduct routine analysis and prepare reports;
• Create consistency across the campus for upward reporting that is easily attainable, but still give flexibility at the unit for reporting at the unit level. This consistency allows us to compare apples to apples data, and;
• Create an efficient way for units to provide projections for long term, strategic planning

Technology

• Axiom SaaS solution (Kaufman Hall vendor) ; Local data integration (Employee, Accounts, GL/Labor data)

Timeline

• Project kick-off: October 3rd 2016; System testing/configuration underway for pilot implementation

More Info: https://aggiebudget.ucdavis.edu/
Drivers & Business Value

- Establish scalable service model with distributed administration
- Establish a managed, consistent, and secure strategy for critical records
- Business process improvement through access to advanced services for workflow, electronic forms, digital signature, full-text search, and e-signature
- Recovering file and office space

Technology

- Laserfiche

Priorities: Identified by user community and support personnel during RFP
  - Usability / User Interface
  - Advanced Search
  - Department Administration
  - Business application integration
  - System Performance
  - Maintenance & Sustainment Effort

Current process migrations to AggieDocs in 2017 (legacy system to Laserfiche)

- Kuali Financial System – Campus POs, invoices, and supporting attachments
- Central HR – Campus personnel files and related Employee & Labor Relations, Disability Management Services, and Benefits documentation
- Central A&FS – AP, Purchasing, Payroll, Contracts & Grants, Student Accounting records
- Shared Services Center (SSC) – Payroll, HR, and Finance files for 192 departments
- College of Engineering – Department personnel files
- Environmental Health & Safety records
- UCD Health – Patient Financials, Accounts Payable, and Payroll

New process implementations

- Campus Injury & Illness Prevention Program (IIPP)
- New hire packet distribution and records management (EDMS w/Docusign integration)

eSignature - DocuSign

Drivers & Business Value

- eSignature reduces turn-around time by automating electronic routing and signature of official University documents.
- Provides secure and effective way to sign and return documents
- Paperless process cutting down costs on storing, copying or mailing

Technology

- Docusign Software as a Service

Pilot Units

Specific business processes from pilot units are being reviewed

- Real Estate Services
- College of Biological Sciences
- Human Resources
- Office of Chancellor and Provost
- School of Law
FOA IT Project Portfolio

Supply Chain – Facilities
Campus Svcs.
- Catalog Shopping & Non-Catalog Purchases (AggieBuy)
- Asset Management System
- Travel Expense Reporting (AggieTravel)
- Outbound Freight Management
- Parking Systems

HR-Payroll
- UCPath Program
- Onboarding
- I-9 processing
- Service Management (AggieService)
- Temp Emp System

Finance-Budget
- Budget Planning (AggieBudget)
- Contracts & Grants Billing
- Cashiering System
- Kuali Financial System 7.0 upgrade

Electronic Document Management System (AggieDocs)
ENTERPRISE STUDENT APPLICATIONS

Doug Berman
Associate CIO
Call for members going out this week; convenes in April.

Representation

- Each college and school at the level of assistant dean, associate dean or above
- Chairperson of the Council of Associate Deans
- Academic Senate
- Office of the University Registrar
- Undergraduate Admissions,
- Financial Aid and Scholarships

- Center for Student Affairs Assessment
- Undergraduate Education, director of advising
- Office of Graduate Studies
- Deans’ Technology Council
- ASUCD
- Graduate Student Association
Four primary principles serve as the foundation for this transition:

**Evolution.** With common core needs across the campus, along with unique college and departmental needs, it’s important that IT be positioned to serve those needs.

**Synergy.** By sharing resources, IT can increase its capacity to serve students, faculty and staff.

**Priorities.** As a campus-wide organization, IT can make strategic decisions that move us all forward.

**Quality.** By aligning IT with the campus’s vision and mission, we can advance quality, expand access and increase business continuity.
Enterprise Student Applications Strategy – March 2016 and Beyond

Banner Stabilization
- Develop an enterprise strategy for student information systems
- Modernize our on-premise Banner environment
- Develop a comprehensive IT governance plan for prioritizing work
- Partner with stakeholders to make sure the right people are involved
- Create a realistic, achievable project plan.

Banner Transformation
- Evaluate Banner 9 to determine the viability of upgrading by October 2018
- What is the vendor’s track record?
- Determine which customizations are needed moving forward vs. what baseline functionality can be leveraged
- Assess the institution’s readiness to execute the project

Tools Developed at UC Davis
- Evaluate existing tools (e.g., OASIS and MyUCDavis) to determine what is needed as part of the enterprise strategy
- Refine and enhance functionality based on stakeholder feedback
- Identify gaps in functionality to determine what direction to go
- Develop internal software development best practices
- Cross-train staff and make sure that knowledge transfer occurs
UC DAVIS CANVAS

Todd A. Van Zandt
Learning Management System Program Manager
Move to Canvas Project

Canvas
- Pre-Launch
- Initial Adopters
- First Wave
- Second Wave
- Third Wave
- All Classes Taught in Canvas
- Single LMS Provider

Winter-Spring 2016
- Single LMS Provider
- Minus Initial Users
- First Wave
- Second Wave
- Third Wave
- Limited Access – No Guest Logons
- Legacy Mode

Days Remaining Until End of Spring Quarter (June 15th, 2017)
111 Days Remaining
Move to Canvas Project

• The joys!
  • Stability
  • Performance
  • Modern interface
  • Mobility
  • Support

• Amid change
  • Course site creation & cross-listing
  • Communication tools
  • Grading
• PROJECT SITES:
  • Held off in Fall quarter to focus on support for academic course transitions
  
  • Created an additional project to focus on this task (over 10,000 existing sites)
    • Began work in early January
    • Assembling guidance, resources, and assistance for SmartSite project site owners.
    • There are many applications to support projects that were not available when SmartSite was adopted 10 years ago.
    • Reviewed Canvas limitations for non-course site uses
      • Email lists
      • Collaborative file uploads for sharing
    • Creating an intake workflow
SmartSite Project Sites

• PROJECT SITES:
  • We anticipate that the work of moving all project sites off of SmartSite will continue into the 2017-18 academic year.
  
  • There is no migration tool from SmartSite to Canvas.
  
  • We will be working with project site owners to find the right tools for their projects, which may include Box, GoogleApps for EDU, Qualtrics, and other tools, as well as Canvas.
  
  • New Sites will be upon request. Canvas will not be open for self-created sites.
UC Davis Canvas Winter Quarter goals

• Project site analysis and service definition (In Progress, vetting workflow)

• Delete unused courses from all previous terms (Completed – January)

• Improved Migration documentation (Completed - January)

• Set default grading scheme on course shells (Completed – February)

• Grade submission improvements (In Progress)
  • Collecting info from other universities
  • Improving UCD Final Grade System
UC Davis Canvas Winter Quarter goals

• Cross listing courses (In Progress)
  • Defined Canvas Support threshold
  • Evaluating tools from other universities

• Canvas Data
  • Decision made on hosting environment

• Improve provisioning and reconciliation processes
  • Automate processes that were manual; add new error checking and remediation

• More LTI Tools integrated
UC Davis Canvas User Advisory Group

• Kicked off in December 2016

• Membership:
  • Academic Senate faculty representative
  • Four additional faculty representatives
    • Representative of various disciplines
    • At least one Academic Federation
  • Health System faculty representative
  • Academic support staff representative
  • Technical support staff representative
  • ASUCD student representative
  • GSA student representative
  • LMS Program Manager (ex officio)
  • Academic Technology Services Director (ex officio)