Fall 2014 ITS Project Prioritization Results

SCHEDULED PROJECTS (7)

1. **Implementation of u.direct**

   The Chancellor's Office has an agreement with vendor College Source to deploy the u.direct product, which integrates with the DARS/u.achieve self-service portal currently being implemented at HSU. This solution will enable students and their advisors to build a four-year graduation plan which can be used to validate planned courses against the interactive degree audit check, potentially increasing graduation rates and decreasing time-to-degree.

   http://www2.humboldt.edu/its/projects/implementation-udirect

   Business Process Analysis: Start January 2015
   Implementation: Start (estimated) June/July 2015

   This project has a number of prerequisites: (1) significant business process and policy changes necessary to take best advantage of this tool and (2) completion of the u.achieve upgrade, currently on target for March 2015. We recommend that the process and policy discussions commence immediately with the Provost, VP of Student Affairs, and AVP of Enrollment Management to identify the "champion" for this project as well as the key issues, stakeholders and changes that must be made before technical implementation can begin. The current CollegeSource u.direct contract notes a required project start date of January 2015; early discussions with CollegeSource indicate the same vendor team now working on u.achieve will also work on u.direct, so we anticipate their being receptive to a later start date, estimated at June/July 2015. Vendor estimated timelines are typically for a 12-18 month implementation.

   > Funding: $56,500 in implementation expenses has been provided by the Chancellor's Office. Travel expenses related to project implementation, as well as $6,000 in annual maintenance, will be covered by Enrollment Management.

2. **High-Impact Practices for Student Success**

   The CO supports the expansion of High-Impact Practices (HIPs) such as learning communities, service learning, undergraduate research, supplemental instruction, and peer mentoring in support of student success initiatives. By matching selected HIPs to the students most likely to benefit from them, determining when and how best to engage those students, and tracking the

results, we anticipate positively impacting HSU student success rates. HSU submitted a proposal to the CO to participate in the next phase of expansion, which has been accepted.

http://www2.humboldt.edu/its/projects/high-impact-practices-student-success

Business Requirements Definition: Start January 2015

Implementation: As soon as requirements are known.

This may require re-evaluating the Enterprise Data Management commitments to 2014-15 goals, which are currently consuming all non-operational time. The Chancellor's Office timeline indicates that the technical element should be completed by February 2015.

> Funding: $10,000 has been provided by the Chancellor's Office.

3. **Hobsons Radius CRM Implementation**

HSU currently uses Hobson's Connect and a number of other customer relationship management systems, leading to a lack of consistency in available data for students, an inability to track and share data concerning students, and a reduction in the campus's overall ability to communicate effectively. With the rapid increase in CEEE offerings and imminent expiration of the Hobson's Connect license, the timing is appropriate to standardize on a campus-wide CRM system. Initial research indicates that the Hobson's Radius solution is the best candidate to meet campus requirements.

http://www2.humboldt.edu/its/projects/hobsons-radius-crm-implementation

Contracts & Business Process Consulting: Start January 2015

Implementation: Estimated start February/March 2015 for Admissions migration from Hobsons Connect (Connect contract expires September 2015). Implementation for CEEE will follow as part of this project scope.

We recommend Radius as the campus-wide CRM solution, which will require campus-wide participation during the business analysis and requirements gathering phase in early 2015. This approach will also allow us to set a sequence for deployment after Admissions and CEEE, each of which will be defined as a separately scoped project and, depending on size, may require the processing of additional project requests to continue deployment.

> Funding: Annual enterprise licensing and PeopleSoft integration costs will be covered by $5,000 from Academic Affairs, $25,000 from CEEE and $55,000 Hobsons Connect licensing that would be repurposed to Radius. The ITS Innovations budget will fund up to $47,000 in one-time consulting, implementation, and training services.

4. **Self-Service E-Benefits**

   Changes to benefit elections can happen at any time of year, not just during open enrollment, which often means employees lose track of which plans they are enrolled in. As a result, benefits may be missioned, dependents may inadvertently lose coverage, or employees may be asked for a large back premium payment. PeopleSoft HCM includes functionality that would streamline and mitigate the potential for error in the current manual processes; by activating this functionality, employees would also be able to access benefit information at any time without the need to submit requests to Human Resources.

   http://www2.humboldt.edu/its/projects/self-service-e-benefits

   Start: January 2015

   We recommend this be deployed with a solid commitment to using existing PeopleSoft functionality and making minimal changes to the myHumboldt portal, i.e. adding links to self-service only. This will minimize the time required to deploy, a desired strategy given the possibility that CHRS may deliver this functionality as baseline. While the CMS Executive Steering Committee is currently evaluating new guidelines regarding the CHRS code freeze, this project may be impacted by that CMS-imposed freeze.

   Funding: No out of pocket expenses

5. **Campus-wide Scheduling & Planning for Academic Resources (SPA)**

   The current Schedule Planning & Analysis (SPA) tool is built on a Microsoft Access database and implemented on an individual college and other area basis. As such, it does not provide campus-wide insight into available resources, leading to support issues, lack of data synchronization with other enterprise solutions such as PeopleSoft, and additional work for ASCs. An effective solution will encompass the benefits of the current SPA functionality but be scalable to an enterprise-wide level to enable rapid, transparent, and reliable matching of resources to academic offerings.

   http://www2.humboldt.edu/its/projects/campus-wide-scheduling-planning-academic-resources-spa

   Business Requirements Definition: Start March 2015

   Implementation: TBD based on requirements definition.

   Requirements are expected to include current functionality plus additional enhancements such as PeopleSoft integration and other predictive information sources. Evaluation of commercial products or the appropriate tool for developing a solution in-house will be needed following the requirements definition. It is unlikely that this enterprise-level solution will be available before

2016, so we are recommending that the current SPA functionality and support structure continue unchanged until the new solution is in place.

> Funding: Depending on the solution, there may be some hard costs but that is unknown at this time. Any in-house developed solution is expected to use existing campus software/systems

6. **Electronic Instructional Student Assistant Appointment Document**

The Unit 11 Collective Bargaining Agreement requires that every Unit 11 employee receive an appointment notification before starting work. The current process involves hard-copy forms and a significant amount of manual information entry and review, leading to errors and delays in completing the notification. In the 2013/2014 academic year, Academic Personnel Services processed 320 appointments for Instructional Student Assistants; adopting an electronic appointment document with automated notification to the employee and hiring department on approval would enable major efficiencies to be achieved and contribute towards the campus drive towards paperless processing.

http://www2.humboldt.edu/its/projects/electronic-instructional-student-assistant-appointment-document

Start: April 2015.

Resource constraints prevent an earlier start; the project will begin with a process analysis to identify opportunities to consolidate forms and notifications. We will focus on identifying the simplest, most expeditious solution delivery, possibly an Apex form with approval routing and a Nolij electronic file cabinet.

> Funding: No out of pocket expenses

7. **Digital Health Clearance for Animal Research Participants**

The Institutional Animal Care & Use Committee (IACUC) requires that participants engaged in research activities with vertebrate animals receive documented health clearance. By automating and digitizing the current manual, paper-based process for the thousands of students, staff, and faculty affected by this requirement, the University will be able to increase data security and reduce time, resource, and paper usage. An effective solution could also serve as a guide for the future development of other student-facing approval processes.

http://www2.humboldt.edu/its/projects/digital-health-clearance-animal-research-participants

Start: February 2015.

A Drupal form can be used to resolve this specific issue. The second submitted IACUC project to automate the comprehensive review and approval process for animal research participants has been identified for further analysis and assessment of the viability of a commercial solution.

PROJECTS REQUIRING FURTHER ANALYSIS (8)

Projects in this category may require submission of a second project request, depending on the outcome of the requested research.

1. **Student Applicant Portal**

    Prospective students receive many different communications from multiple departments throughout the application process, requiring applicants to keep track of multiple deadlines and risking jeopardizing their enrollment. By establishing a single webpage that enables students to identify and track all the steps needed to enroll at HSU, the University can increase enrollment and maximize its investment in recruitment.

    http://www2.humboldt.edu/its/projects/student-applicant-portal

    Start: January 2015

    The requestor's intention is to deliver this functionality through the myHumboldt portal, to which student applicants already have access but where the information they receive is very generic and not personalized to applicants' specific needs. Preliminary design discussions are under way in Enrollment Management and may involve a phased deployment. Further analysis is necessary to fully understand the requirements, the likely development time required, and the appropriate technical resources. Technical resources for myHumboldt development are extremely limited until July/August 2015, but placing this request in this category provides a path forward for design and consultation with appropriate technical resources. Once that is done, this project can be estimated for effort, resource availability, and delivery schedule.

2. **Institutional Routing Process Automation &**

3. **Digital Protocol Review & Approval Process for Animal Research Participants (IACUC)**

    Institutional Routing Process Automation: HSU's Sponsored Programs Foundation submits proposals for and administers almost all externally funded grants on behalf of the University. The current institutional routing process, through which multiple functions across campus provide input and/or approval, is largely manual and somewhat duplicative, leading to delays and lack of visibility. Automated electronic routing would allow SPF staff, as well as faculty and students, to spend more time on the grants themselves and on building relationships with outside agencies, at the same time delivering greater efficiencies in document routing, collaboration, approvals, tracking, and storage.

http://www2.humboldt.edu/its/projects/institutional-routing-process-automation

Digital Protocol Review & Approval Process for Animal Research Participants (IACUC): Before initiating a research project or teaching program involving animals, responsible parties must research legal issues, obtain government permits as required, and submit a completed protocol document to HSU's Institutional Animal Care & Use Committee (IACUC). Moving to a digitized routing and approval process from the current manual, paper-based process would reduce the administrative time required as well as the potential for errors, enabling the focus on student/researcher needs and pursuit of grant opportunities to be increased.

http://www2.humboldt.edu/its/projects/digital-protocol-review-approval-process-animal-research-participants

Start: January 2015

The programming resources required for the Institutional Routing Process Automation project are not available. For this reason, we recommend bundling this request with the IACUC review and approval process for evaluation of a commercial solution that is specifically designed for research and grant processing, which may also include features of benefit to Institutional Review Board processes. Should a commercial product be identified, this research could include the purchasing process, leaving the implementation portion as a future project request. Should a commercial product not be viable, these requests will be re-evaluated against future available resources.

4. **Emergency & Disaster Response Data Storage**

In order to mitigate potential liability associated with documenting chain of command notification and timely communications during critical incidents, as well as streamline communication and reporting at the Divisional and Campus levels, HSU needs to establish a single location for storage of text and email messages related to those incidents. Such communications are currently stored by individuals, making it difficult to extract messages if required.

http://www2.humboldt.edu/its/projects/emergency-disaster-response-data-storage

Start: January 2015

Early discussions indicate a solution may be found among currently available tools. This research will define specific requirements and how these requirements may be met by those tools.

5. **Job Applicant Data Availability**

Moving confidential job applicant data from Drupal to OBI will enable the campus to extract and report on this data more efficiently, contributing to improved business operations and services.

The current manual manipulation of data increases the likelihood of introducing errors into the process; moving to OBI would also enable the University to derive additional benefits from the existing standard campus reporting tool.

http://www2.humboldt.edu/its/projects/job-applicant-data-availability

Start: April 2015

Further research is required to determine the best method for extracting the required data from Drupal, which may require a change in the way we input information into Drupal as well as a secure web programming solution, as noted in a recent IT audit. The resources needed to move forward with this research are not available until April. Results of this research will also likely benefit other Drupal-users on campus who have also expressed interest in improved access to this data.

6. **Investigate Alternative Helpdesk Ticketing Systems**

The current Dell KACE Management System used by the Technology Helpdesk has been in place for five years and is now only used for ticketing since the introduction of different workstation management systems for both Windows and Macintosh clients. This reduced usage has brought to the fore shortcomings such as slow response times, poorly developed knowledgebase, no customer web interface, and lack of search and monitoring capabilities. As a result, ITS is looking to review currently available options for alternative helpdesk ticketing and management systems to improve response times and customer service.

http://www2.humboldt.edu/its/projects/investigate-alternative-helpdesk-ticketing-systems

Start: April/May 2015

This investigation will begin with a requirements definition from stakeholders and will include opportunities to consolidate the ticketing systems currently in use. Following requirements gathering, evaluation of potential products, pricing and implementation timelines will be conducted.

7. **Electronic Portfolio System Identification**

Individual departments at HSU are using a variety of tools to store, organize, and share papers, projects, resumes, assessments, and other documents that make up electronic portfolios for students. By exploring available options for a common platform, the campus can plan for a more effective system for assessing student growth over time and enable students to take their portfolios with them when they graduate.

http://www2.humboldt.edu/its/projects/electronic-portfolio-system-identification

This initiative will begin with requirements definition from stakeholders and then evaluate commercially available products. As with any project in this research category, a subsequent project request may be necessary for the actual implementation of a solution. Should a campus-wide solution be approved and/or funded, we recommend that other tools currently in use be retired as a condition for implementing the campus-wide solution.

8. **Canvas Learning Management System (LMS) Implementation**

Campus has been running an investigation of the Canvas LMS during the Fall 2014 semester with eight faculty teaching 11 courses for 188 students as a possible alternative to the current Moodle open source system, with particular reference to gradebook issues. If this investigation results in positive reviews and recommendations in the summary document, the plan would be to purchase a 1-3 year supported hosted package for Canvas and implement it alongside Moodle while migrating existing LMS integrated technologies to Canvas.

http://www2.humboldt.edu/its/projects/canvas-learning-management-system-lms-implementation

Future activities relating to this project are dependent on results from the current Canvas investigation.

UNSCHEDULED DUE TO LACK OF AVAILABLE RESOURCES (3)

1. **Sponsored Programs Payroll Timesheet Automation**

The 700+ current Sponsored Programs Foundation (SPF) staff currently completes 200-225 manual timesheets each pay period. By automating the process, payroll processing will be more efficient and less error-prone, freeing up time to increase productivity for multiple-division departmental processing and contribute to enhanced student opportunities.

http://www2.humboldt.edu/its/projects/sponsored-programs-payroll-timesheet-automation

2. **Automated Thesis/Project Submission and Approval**

The current manual submission process for the routing and approval of approximately 150 theses and projects per year is inefficient and disconnected from the submission process for the actual thesis or project, leaning to delays and shortcuts. By creating a single workflow that encompasses every step from initial submission and request from the student through editing and revisions to placement in the Humboldt Digital Scholar, HSU will ensure the integrity of the process, which will be significantly more transparent, efficient, and streamlined.

http://www2.humboldt.edu/its/projects/automated-thesisproject-submission-and-approval

3. **eRecruit for Staff & Faculty**

   The current manual, paper-based application submission process is labor-intensive and inefficient for the 6000+ applications handled by the University each year; faculty positions also currently require individual Sharepoint sites. Implementing PeopleSoft's eRecruit, part of the HCM *sys*tem already in use on campus, would enable applicants to store profiles on the campus network, eliminate the need for individual SharePoint sites, and enable HR and APS staff to more efficiently organize and review applications.

   http://www2.humboldt.edu/its/projects/erecruit-staff-faculty