

University of Tennessee

Future State Process Reimagination Session Post-Session Materials

July 30, 2021

Faculty Focus Group & Employee Self Service

Future State Reimagination



FUTURE STATE PROCESS REIMAGINATION

Purpose:

- A collaborative experience to focus on the future
- Share best in class practices and potential application for UT
- Engage in active dialog in a safe space to design for the future
- Gather inputs from discussion topics to create a design decision inventory for ERP activities

As a participant I will...

- Actively participate – speak up, use the chat, and share my thoughts during activities
- Help identify opportunities to incorporate leading practices to improve processes for myself, my teams, and the customers I support
- Engage in dialog around design decisions, identifying challenges and strategies to navigate barriers
- Co-create the guardrails ERP can use for future design

To influence and impact ...

- Summaries for future state process opportunities
- Identification of pre-ERP needs/focus areas such as policy changes
- Inventory of key process design considerations that will inform future ERP configuration choices

Agenda

Objective	Agenda Item	Aprx. Duration
<p><u>Business Process Level:</u> Align on future state vision, informed by leading business practices and modern ERP capabilities.</p>	<p>Introduction Meet the team and review goals and objectives for the session.</p>	5 minutes
	<p>UT Vision for Value Provide an overview of what we've heard through Business Process Owner and Focus Group discussions. Preview UT Vision for Value statements and opportunities for future state design.</p>	5 minutes
	<p>Leading Practice Overview Provide an overview of leading practices, modern ERP capabilities, and relevant examples from other peer institutions.</p>	20 minutes
<p><u>Sub-Process Level:</u> Identify future state goals and potential solutions ("what must be true") to make those goals a reality across people, process and technology.</p>	<p>Facilitated Group Reimagination Activity</p> <ul style="list-style-type: none"> • Highlight opportunities identified during Focus Group sessions • Integrate leading practice recommendations • Identify future state goals and aspirations • Answer "What must be true?" in order to make goals a reality • Discuss potential solutions and align on recommendations 	10 – 20 minutes (per sub-process)
	<p>Summary & Close Summarize session outputs and preview what comes next: "Where do we go from here?"</p>	10 minutes

Guiding Principles



- B**old and impactful
- E**mbrace diversity
- O**ptimistic and visionary
- N**imble and innovative
- E**xcel in all we do
- U**nited and connected
- T**ransparent and trusted



Governance, Transparency & Inclusion

The ERP Program will be led by the UT System Administration Executive Sponsor and Executive Steering Committee who will work closely with all stakeholders throughout the University and the Program team. The ERP Program is committed to broad system-wide collaboration and transparent decision-making. The Program team will communicate frequently and fully to ensure accurate information and data are shared with the wider UT community and will seek input and feedback throughout.

Simplification & Standardization

The ERP Program will simplify operations and processes while ensuring the processes meet user needs. Processes will be redesigned based on higher education best practices and ERP functionality. Standardization of processes and data definitions across the UT System will maximize the opportunity for collaboration, facilitating the One UT culture.

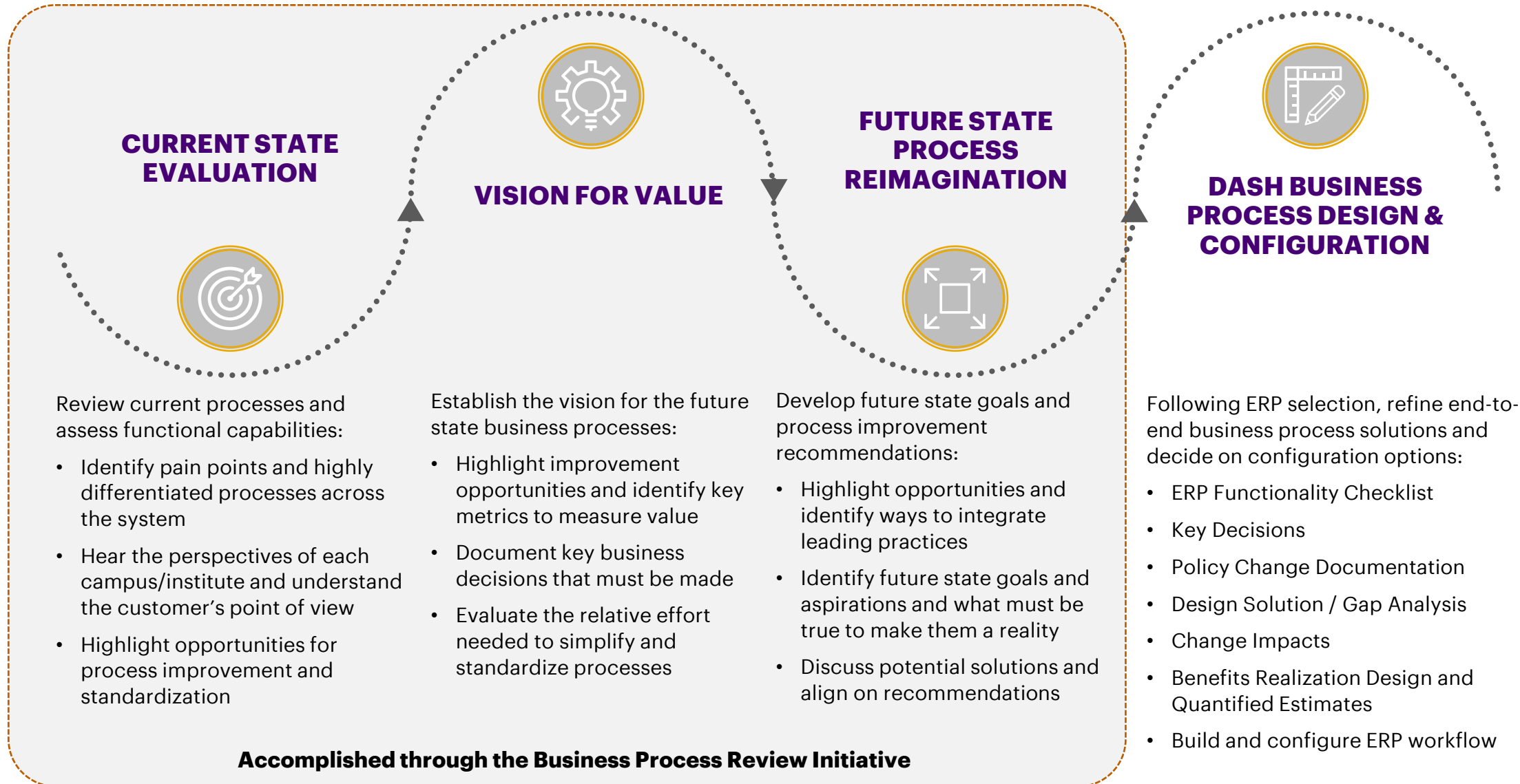
Measurable Improvements

Improvements to transformed business processes will be measured by qualitative or quantitative standards as appropriate—for example, by the number of approvals eliminated or by stakeholders' judgement that reports contain more useful data.

Integrating Technology

UT System will adopt a culture of continuous improvement through technology. Rather than configuring software to current operations, the way we work will change as we adopt new functionality. Increased operational efficiency will be achieved while maintaining compliance with State laws and UT policies. The University will first use the ERP platform functionality to its fullest extent before considering additional software packages or alternative business processes.

Business Process Transformation



Select Session Findings

- Faculty would like to be engaged further in process & ERP discussions; faculty are very involved with Imedris, Concur, Cayuse, Elements, etc systems and processes
- Reporting and Effort Certification
 - GLs for PI reporting are challenging to interpret; would like to be able to create, export, and manipulate reports; drillable functionality to see information at a high level then drill down into expenditure details would be very helpful
 - Multiple accounts for the same project due to changing F&A rates is challenging to keep track of and maintain
 - Effort certification for multiple funding sources should be streamlined/simplified; effort certification for non-exempt employees should be simplified
 - Need the ability to add multiple PIs to a grant
- Timing between being notified of research incentive bonuses and being able to go online to make the request to defer into retirement is not often possible
- Need to consolidate similar activities/processes in one system; need uniform/consistent guidance for processes/policies

Sticky Swipe Comments

“It would be nice to have...”

“I need the ability to...”

“We would need...”

Faculty Needs

Need the ability to understand how these processes will interrelate with our other work processes.

Key is not having the most expensive people on campus having to deal with the hosts of systems we currently have to deal with

Focus on what the key elements that faculty spend time on which is likely not very heavily the current "self-service"

Streamline the processes for similar activities

Need to eliminate redundancy

REPORTING: Greater functionality in creating, exporting and manipulating reports in all areas of IRIS. i.e. ledgers, receivable reports, etc.

Will there be compliance checking in employee self service on retirement accounts - 403B, 401K, 457 etc

Do not force the use of this system for faculty and postdoc recruitment

Dealing with changes in F&A rates and multiple accounts for the same project

Not having to set up several different accounts for the same project because of some components not having F&A

The scope of training for different types of employees/different types of processes

Relational connectivity between the various areas (data tables) within IRIS. Accounts payable- need to pay a vendor, vendor number, vendor payment information are in different areas.

Ease of effort certification for those involved with multiple funding sources

Ability to customize access privilege sets to various IRIS areas.

Materials and Next Steps

Session Materials

- [PreRead Materials](#)
- [Session Materials](#)

Next Steps

- Key decision inventory
- Process recommendation inventory
- Future state reimagination summary documents