

An aerial, high-angle view of a large, multi-level atrium. The space is filled with people walking and sitting at tables. The floor features a large circular logo with the text "UNIVERSITY OF CENTRAL FLORIDA" and "1963". The architecture is modern with curved balconies and railings. The overall color palette is dominated by yellow and white.

ERP Transformation Open Forum

July 29, 2020

Agenda

1. What is the ERP Transformation?
2. Why are we doing it?
3. How will it impact you?

Panelists



Elizabeth Klonoff
Vice President for
Research and
Dean of the
College of
Graduate Studies



Theodorea Berry
Vice Provost of
Student Learning
and Academic
Success and
Dean, College of
Undergraduate
Studies



Joseph Trubacz
Interim Chief
Financial Officer



Misty Shepherd
Interim Vice
President and
Chief Operating
Officer



Maureen Binder
Assoc. VP & Chief
HR Officer



Joe Harrington
Pegasus
Professor and
Chair, Faculty
Senate



Paige Borden
Assoc. VP & Chief
Analytics Officer



Michael Sink
Interim Vice
President and
Chief Information
Officer

Welcome



Dr. Joe Harrington

ERP Transformation



What is ERP?

Circa 1997-2003

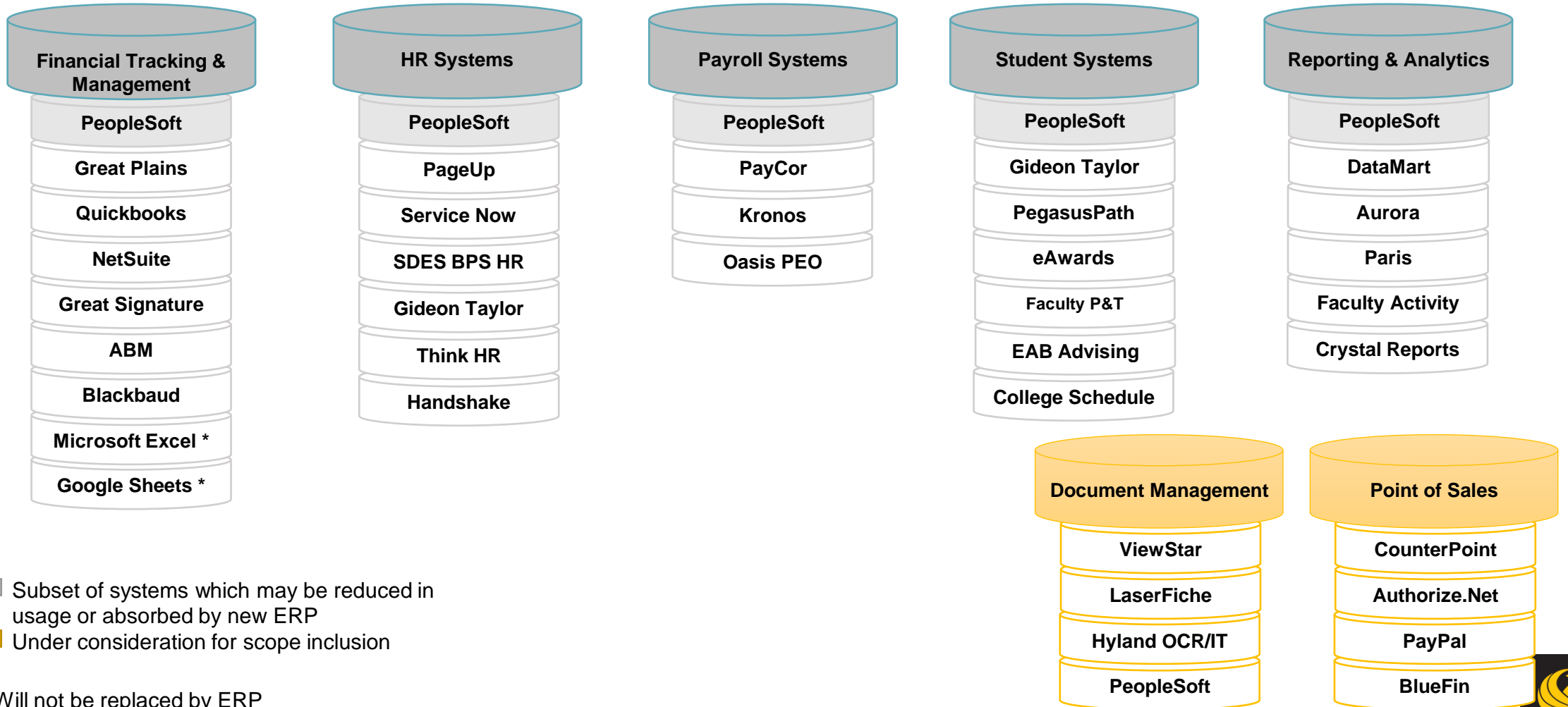
ORACLE®

PEOPLESOFT



- Financials
- Human Capital Management
- Campus Solutions (Student Records)
- Faculty Information System (eP&T)
- myUCF Portal
- Reporting

Application Portfolio Today

Our Sprawling Landscape (not all-inclusive)



Key

-  Subset of systems which may be reduced in usage or absorbed by new ERP
-  Under consideration for scope inclusion

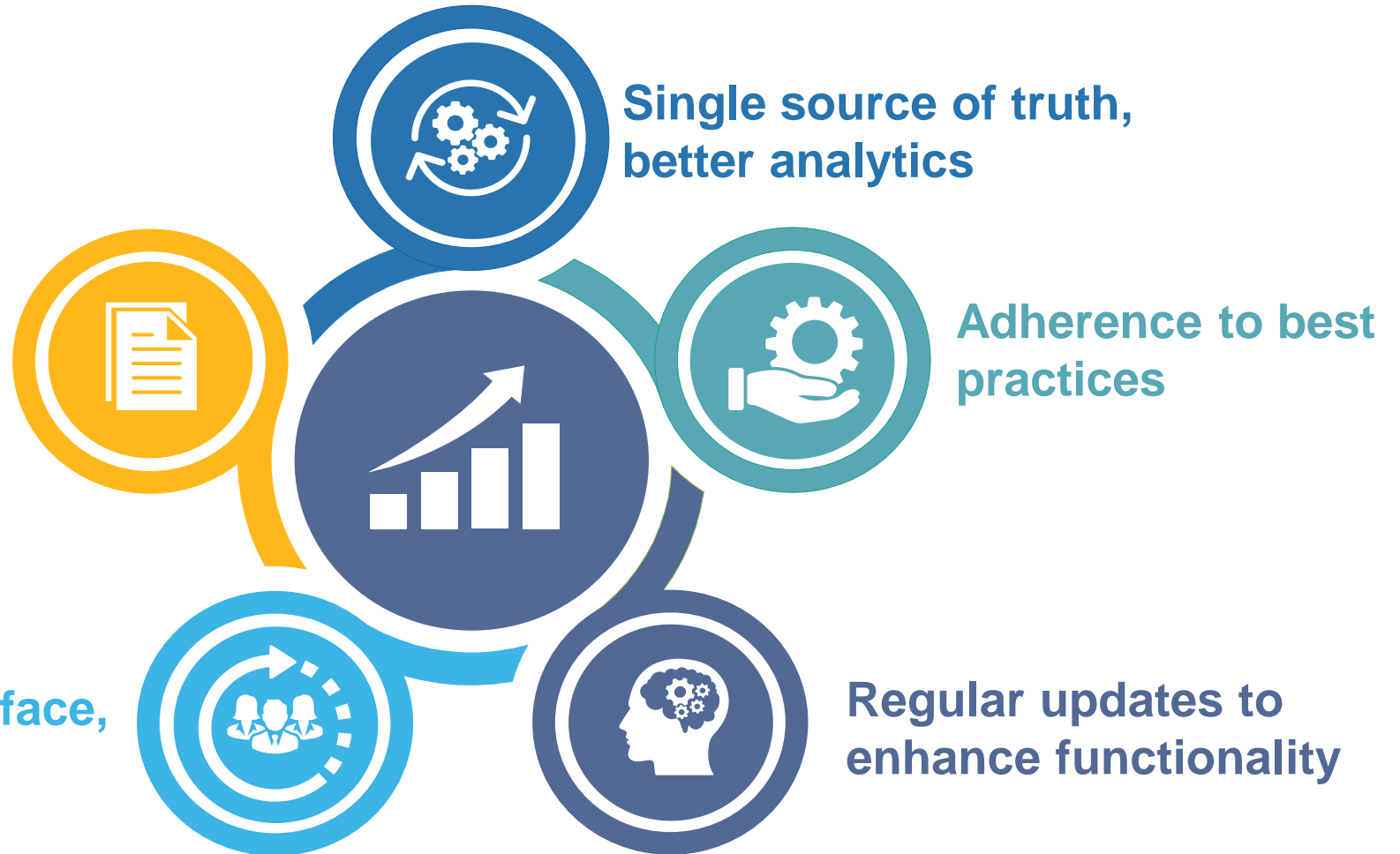
* Will not be replaced by ERP

ERP Transformation

What are the goals?

One system to perform all key functions

Modern user interface, easy to use



Options

Two players



ORACLE®

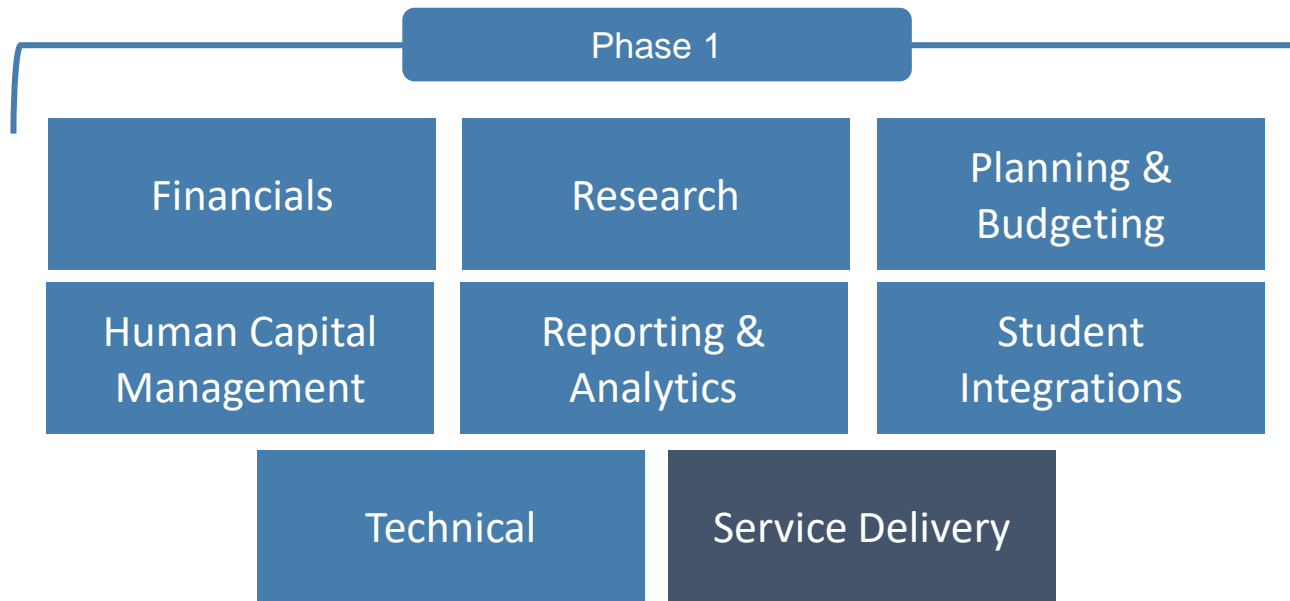
CLOUD



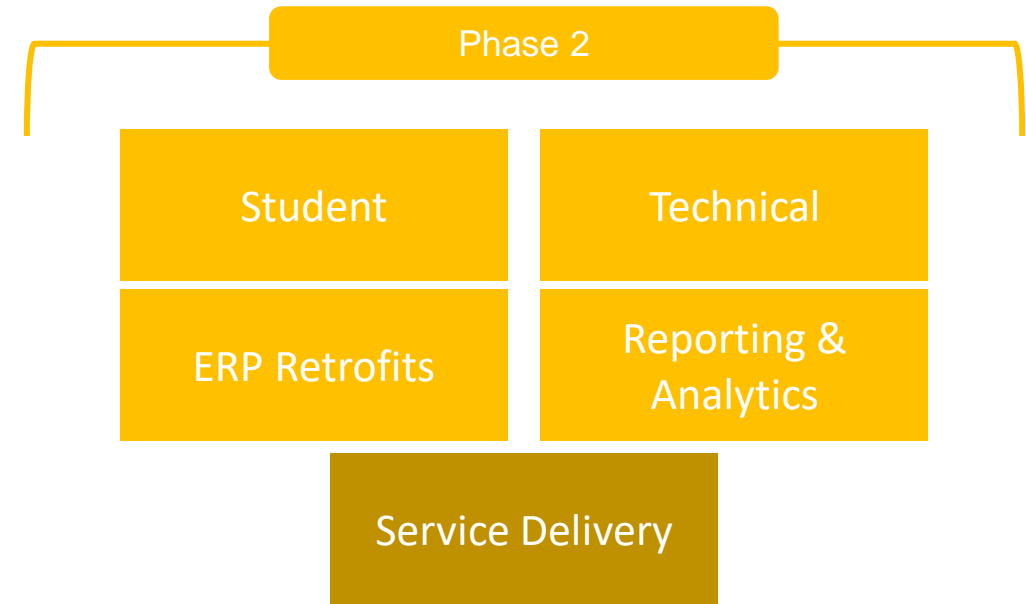
workday®

High-Level Future Roadmap

Project Phases








24 Month + Support



20 Month + Support

High-Level Future Roadmap

Project Timeline

Fiscal Year	FY21	FY22	FY23	FY24	FY25
Cloud Software Vendor Selection					
Phase 1: ERP Cloud Implementation					
Phase 2: Student Implementation & Retrofits					
Reporting & Analytics					

Assumptions

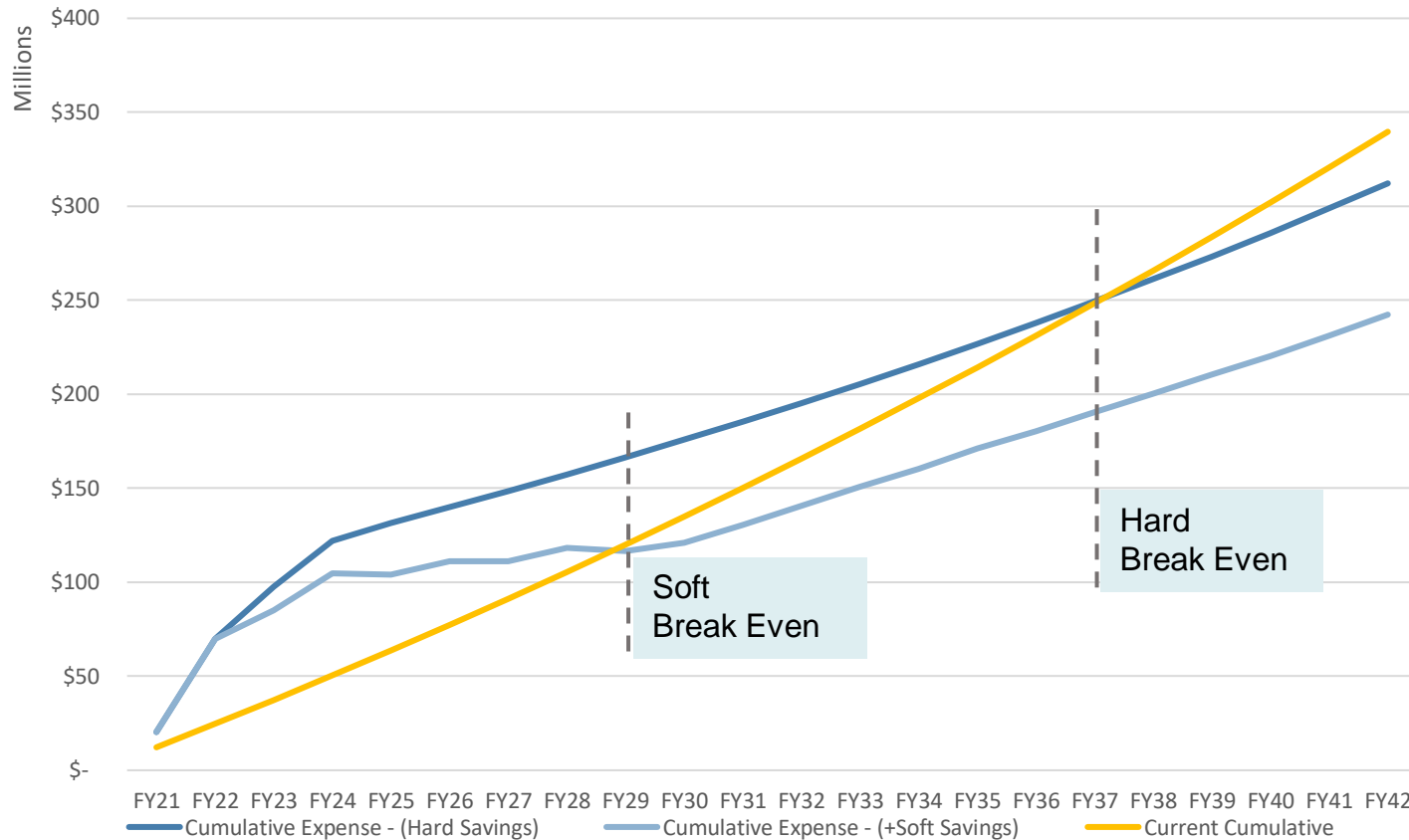
- Phase 1 begins October / November 2020 with a 24-month implementation
- Phase 2 will require confirmation of resources, timeline prior to kick-off in January 2023
- Reporting & Analytics will consist of two phases:
 - Phase 1 – reporting for financial, research, and human capital management, development of data warehouse, support for existing student reporting systems, and master data management
 - Phase 2 – reporting for student systems

 Post Go-Live Support Period

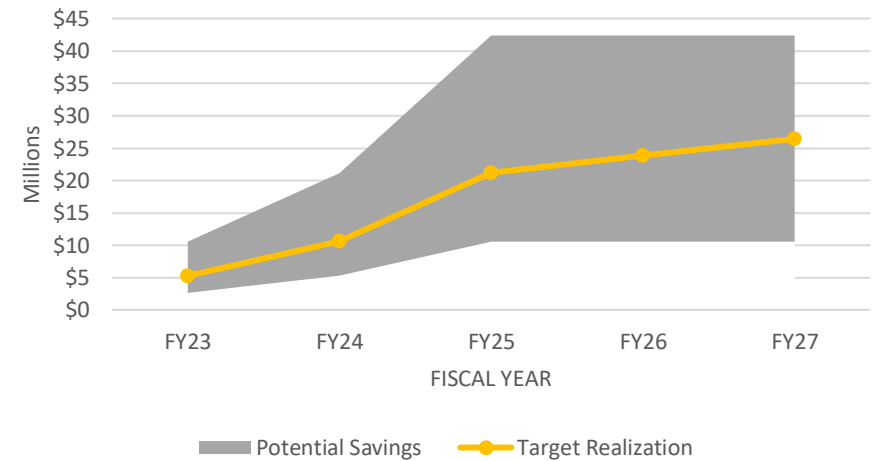
Business Case for ERP

Financial Summary | Break Even Analysis

Break Even Analysis



Potential Efficiency Realization



KEY TAKEAWAYS

- Soft break even achieved in 5 years via realization of efficiencies
- Hard break even achieved in 12 years due to reduction in operating expense
- Conservatively assumes only 20% realization of identified potential inefficiencies

Impacts by Area

Student Impact



Transforming Student Systems

- Provide students enhanced and mobile self-service that enables them to plan and succeed (e.g. integrated degree audit with a student planner and registration system)
- Ability to quickly access information and data that enable success-oriented services - (e.g. identify students who may be approaching graduation or need financial assistance)
- Provide automation and workflow that are critical for serving a student population of 70,000. – (e.g. degree certification, or transfer credit evaluations)



What systems will be replaced?

- Applications **older than many of our students!**
- Spreadsheets (but maybe not all of them)
- Many paper-based, manual processes



What it means

- Intuitive student experience accessible from any device – anytime, anywhere
- Spend more time learning, less time searching
- Increased efficiency = better service!

Finance Impact



How will ERP transformation support Finance?

- Automates manual processes and standardizes business practices enterprise-wide
- Provides simple access to information needed for real-time monitoring, analysis and reporting of key data facilitating decision-making
- Pro-actively manages risk and compliance with inherent controls
- Provides efficiencies allowing administrative resources to focus on value-added activities to support faculty and students



What systems will be replaced?

- PeopleSoft Financials and various other finance sub-systems will be replaced with ONE financial system and a budget and planning tool enterprise-wide



What it means

- Eliminating the need to utilize over 10 different finance systems, 7 HR systems, 7 student systems, 8 reporting tools and various Excel spreadsheets
- More information available
- More resources dedicated to the academic mission

Human Resources Impact

How will ERP transformation support Human Resources?



- Tracks and processes all employee data from hire to retirement.
- Payroll and Benefits
- Required reporting

What systems will be replaced?



- PeopleSoft, PageUp, and several smaller systems
- Manual processes and spreadsheets

What it means



- Eliminate 13,000+ manual time reporting entries per pay period
- Review and redesign the Faculty Activity System
- Efficiencies will allow more resources to be dedicated to UCF's academic mission

Research Impact



How will ERP transformation support Research?

- More robust reporting and analytics tools for award management and oversight of funding, budget, spend, compliance, etc.
- Increased visibility and ease of access to award-related financial activities, such as expenses, payments received, accounts receivable, invoicing, etc.
- A more flexible chart of accounts, allowing for a reduced number of projects needed for an award (one project across multiple departments).
- Additional benefits received from modernizations in other modules (HR, etc.)



What systems will be replaced?

- PeopleSoft Financials and various Excel spreadsheets



What it means

- Enhancements will support activities for over 800 Principal Investigators on over 1,600 active projects

Reporting and Analytics Impact

Impact on Reporting & Analytics

- Information and insights
- Decision support for actions

What systems will be replaced?

- PeopleSoft Reports and Query Tool
- Financials Data Mart – current style

What it means

- Move from spreadsheets to dashboards and mobile-ready views
- Elimination of siloed data sources
- One-stop shop for analytics



Next Steps

Next Steps

- Vendor Demos will be streaming virtually and are open to all who wish to participate
 - August 10-14 = Oracle
 - August 17-21 = Workday
 - If you haven't received an invitation and would like to participate, please request one from Cherie Herrin
- Project Name Contest
 - Thanks to all who submitted project name suggestions! Be on the lookout for a communication with the winning entry.
- Monitor **erp.it.ucf.edu** for updates

Stay Informed

The screenshot shows the top portion of a website. At the top left is the UCF logo and the text "UNIVERSITY OF CENTRAL FLORIDA". To the right is a "UCF SIGN IN" button with a plus sign and a search bar labeled "Search UCF". Below this is a large banner image of a UCF campus with a yellow overlay containing the text "UCF Cloud ERP Project". A semi-transparent grey box over the banner contains the text "Monitor **erp.it.ucf.edu** for project updates". At the bottom of the banner is a yellow navigation bar with links for "Home", "Our Guiding Principles", "Resources", and "About Us".

WHAT IS ERP?

Enterprise Resource Planning, or ERP, refers to the software and systems used to manage information across an organization. ERP systems are used in many industries to help leaders gain real time insight into the well-being of their operations. This is made possible by connecting each part of an organization through a comprehensive information system that enables access to real-time data from all areas and functions.

In other words, modern ERP tools can help break down silos between business units and allow

PROJECT NEWS

You are invited to the ERP Transformation Open Forum at 2:30 p.m. on July 29

July 24, 2020

To learn more about the ERP Program and ask questions, you are invited to join us for an ERP Transformation Open Forum. The following panelists

Questions



Sabrina LaRosa
Student Body
President



Jana Jasinski
Vice Provost for
Faculty Excellence

Questions

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