ITS Executive Steering Committee (ITESC)

Agenda and Materials – August 13th, 2020

Technology@Loyola
INFORMATION TECHNOLOGY AND SERVICES | LOYOLA UNIVERSITY CHICAGO

Agenda

Start of School Update
- D. Vonder Heide, D. Fitzgerald

EAB Student Success Platform
- P. Roberts, D. Fitzgerald

Loyola Digital Experience Schedule Progress
- D. Vonder Heide, D. Fitzgerald

Faculty Administration Re-architecture Strategy
- S. Malisch, J. Sibenaller

ITS Portfolio Prioritization Review
- S. Malisch, J. Sibenaller

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Start of School Update

Support

- *Training*
  - Attendees – 1,394
  - Total Sessions Offered - 64
  - Unique Sessions Topics - 50
- *Faculty Consultations*
  - Drop-In's - 152
- *Service Desk*
  - Total Calls – 17,307/9,903/3,265
  - Sakai Calls - 1407
  - Fall Hours
    - Monday – Thursday: 8:00AM – 8:30PM
    - Friday: 8:00AM – 7:00PM
    - Saturday/Sunday: 8:00AM – 1:00PM
- *Increased Use of "Soft Phones" for Campus Offices*

Sample Training Sessions:
- ➢ Getting Started with Sakai
- ➢ Panopto and Zoom
- ➢ Sakai Deep Dive: Gradebook
- ➢ Recording and Editing in Panopto
- ➢ Making Your Zoom Meeting More Secure
- ➢ Sakai Deep Dive: Tests & Quizzes
- ➢ Introduction to Respondus
- ➢ Using Qualtrics
- ➢ Building New Skills with Hoonuit
- ➢ Getting Started with Learning Analytics Report

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Start of School Update

Teaching & Learning Projects/Tools

- Dual Mode Classrooms
  - LSC – 26
  - WTC – 7
  - HSC – 11
- Digication
  - e-portfolio
- Sakai Upgrade
  - Enhancements in Assignments, Tests and Quizzes and Gradebook
  - Winter Break Deployment
- Labster
- Hands-On-Learning (HOL)
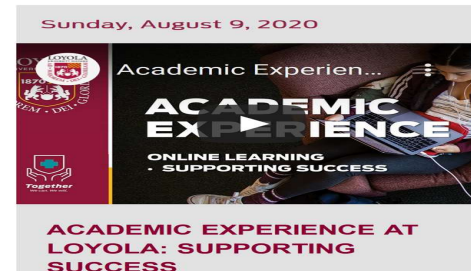- Respondus
- Proctortrack
- Adobe

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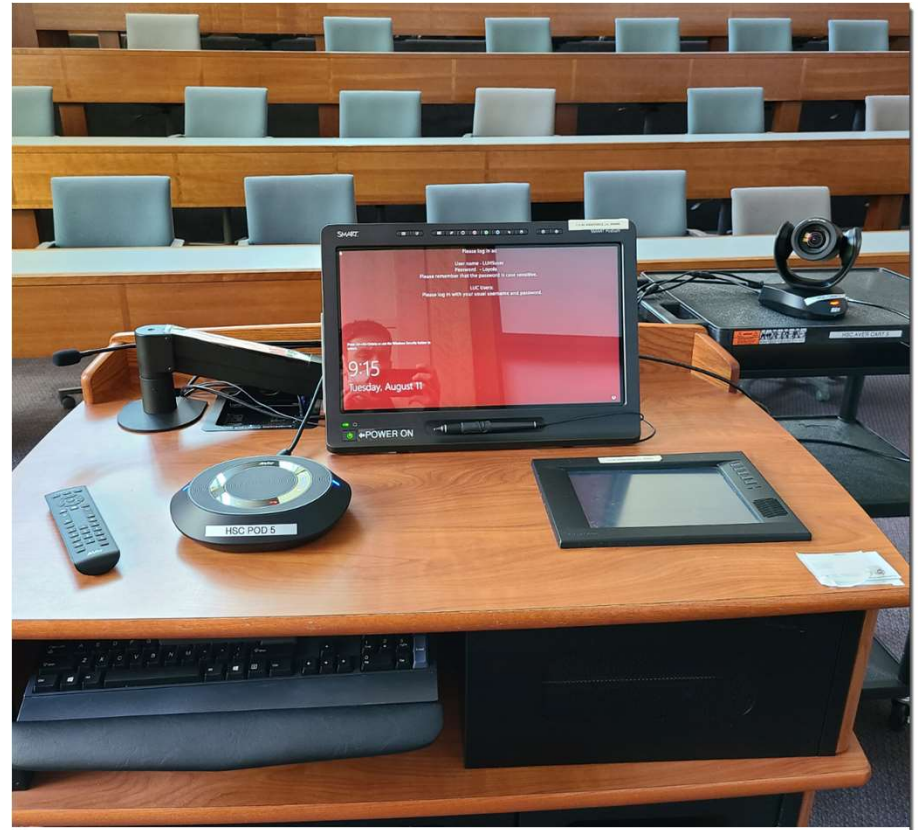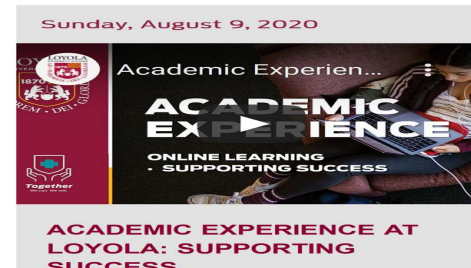
Start of School Update

Process

- Loan Program
  - [Technology Continuity](#)
- Webinar Assistance
  - Zoom Meetings: 211,135
  - Participants: 1,598,108
  - Webinars: 365
  - Attendees: 27,417
- Increased collaboration across LSC, WTC, HSC for all offerings

Start of School Update
Integration and Application Changes

Office/Department/Unit	Action
Campus Recreation	Modified the extract to LOCUS to allow for no activity fee
Wellness Center	Modified the extract to LOCUS to allow for no activity fee
Campus Card	Implemented "Get" for self-service photo submission, including the downstream photo processes
Residence Life	Assisted with Room Move-in Date Selection processing and will need to assist with refund processing
Student Academic Services	Upgraded Zoom plugin and added Law to eligible students
Registration & Records	Re-enabled paper transcripts
Student Development	Developed UPass Opt-Out application
Wellness Center	Applied student health insurance updates

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EAB Navigate: Value and Impact

- **Student Retention**
  - Advanced search – identify student groups at risk in granular fashion
  - Academic planning – shared workspace between student and advisor; increase efficiency with sequenced course suggestions; potential to reduce time to degree

- **Advisor/Staff Workflow Improvement**
  - Student profile – synthesize many different LOCUS screens
  - User-friendly advising notes – improves consistency and workflow within and across units

- **Student User Experience & Communication**
  - Easy appointment scheduling – reduces friction
  - Targeted email and texting campaigns - provides seamless pipeline to advising

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EAB Navigate: Value and Impact

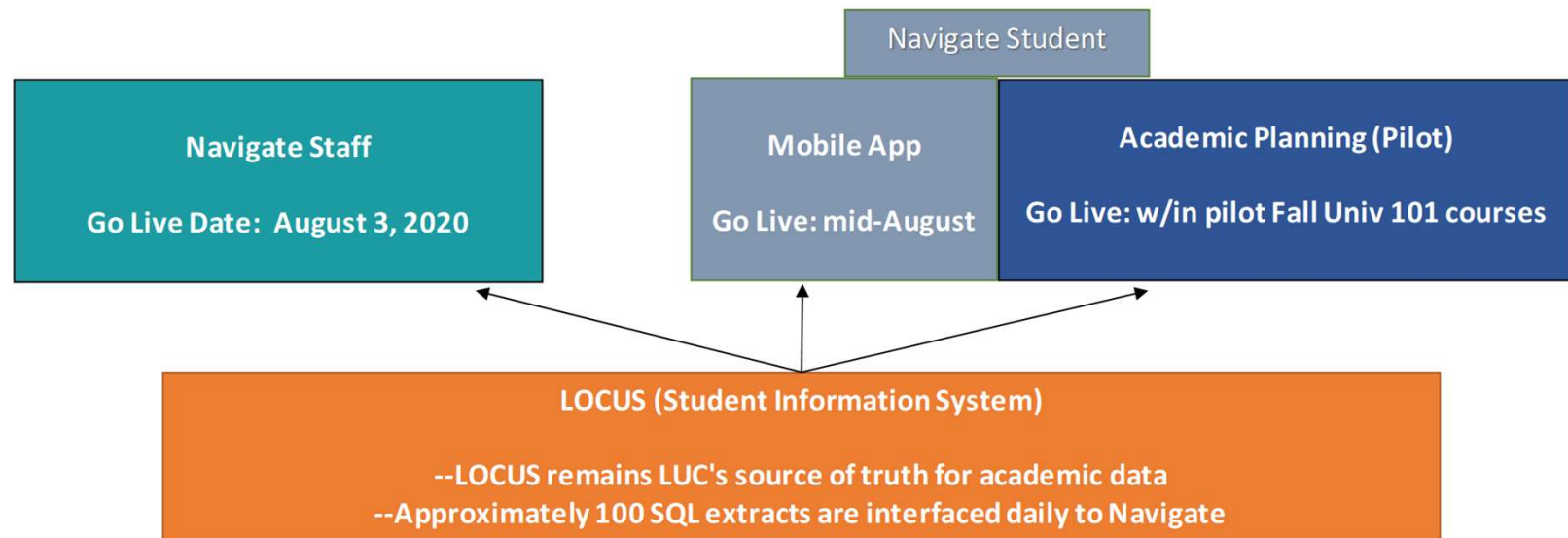## Baker-Tilly Report on Student Success and Retention (April 2019)

- **Recommendation: Data-driven decision-making on student success programming and initiatives.**
  - EAB will provide a new source of data through intake forms, quick polls, appointment reports, and advanced search functionality
- **Recommendation: University visibility into advisor workload and consistency of advising services.**
  - EAB provides a platform to view more accurate data.
- **Recommendation: Strategic student communication about student success information.**
  - EAB gives us the opportunity to create strategic campaigns to reach students in targeted ways.

Council for Student Success Technology Subcommittee Report (April 2019)

- **Recommendation: Create "student engagement hub" that would centralize and personalize messaging to make it more student-centric.**
  - EAB serves as this hub. It allows us to create messaging campaigns centrally and personalize them to specific student groups, such as students who have not yet registered or students who are earning a failing grade in a class.
  - It also allows for multiple modes of communication: e-mail, text

EAB Navigate Student Success Platform

EAB Navigate Phase 1 Implementation

Navigate Student

Navigate Staff

Go Live Date: August 3, 2020

Mobile App

Go Live: mid-August

Academic Planning (Pilot)

Go Live: w/in pilot Fall Univ 101 courses

LOCUS (Student Information System)

--LOCUS remains LUC's source of truth for academic data
--Approximately 100 SQL extracts are interfaced daily to Navigate

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What are we implementing again?

- ## Navigate Staff: Go Live Date – August 3rd

  - **Phase 1 Users**: Professional Advisors & staff from undergraduate academic advising areas.

    - *Future phase users will include faculty advisors and different administrative staff users (student affairs, HUB, etc.)*

  - **Phase 1 Functionality**: Student profile, Advanced Search, appointment scheduling & calendar integration, robust communication features.

    - *Future phase functionality will include progress reports, grade alerts, and case management.*

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Student Profile Sample

Advanced Search Sample

What are we implementing again?

- Navigate Student – Mobile App
  - Go Live mid-August

  - **Users:** Undergraduate students who download the app.

  - **Functionality:** App includes content such as Class Schedule, Campus Resources & Events, Holds, To Do's, student-initiated appointment scheduling that integrates with Navigate Staff

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What are we implementing again?

- Navigate Student – Academic Planning –   Go Live with start of Univ 101 classes

  - **Phase 1 Pilot Users:** Students in ~5 Univ 101 classes and their instructors/advisors.

  - **Phase 1 Functionality:**
    - Building academic plans from course-sequenced templates.
    - Collaborative digital workspace for students & advisors.

    Future phase functionality: schedule building & registration

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Academic Planning

After Go Live … What's Next?

- Production Support
  - Assist with issues & questions
  - Ongoing training for new advisors

- Start Planning for Phase II!
  - Nav Staff – new users, new functionality
  - Academic Planning – schedule building & registration pilot

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Loyola Digital Experience Schedule

Loyola Digital Experience - Foundation Timeline - 08/11/2020

Active Projects	2019												2020												2021					
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Privileged Identity Management												planning			pilot			deploy												
Multi-Factor Authentication	planning				pilot					deploy								required												
Multi-Factor Authentication Application Enablement (Lawson, Sakai, etc)																Slate		Lawson	Sakai	Secure File Trans	phased deployment				TBD					
Information Protection and Data Loss Prevention		planning											pilot			deploy														
Password Self-service								planning			pilot				deploy															
Mobile Device Management						Policy Review	planning					pilot						deploy												
Loyola Digital Experience Portal																			resource constraints		TBD									
Complete Projects																														
Exchange Online (POC)	COMPLETE																													
Exchange Online Migration		COMPLETE																												
LastPass Password Management			COMPLETE																											
Exchange Online Protection and Advanced Threat Protection(email)					COMPLETE																									

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Loyola Digital Experience Digital Assistant/Chatbot

Complete

- Chatbot Production Infrastructure Deployment

In Progress

- Chatbot Setup Enhancements
  - Automated Security Sync – expand access to all students
  - Non Authentication Security – expand access for guests
  - Add LU'ie on additional LUC web pages

Future Projects

- Explore Chatbot for COVID-19
- Deploy the Digital Assistant/Chatbot within Human Resources
- Placeholder - Chatbot for Financial Assistance
- Placeholder - Chatbot Expansion for ITS Service Desk
- Placeholder - Chatbot for Academic Advising

Loyola Digital Assistant

Loyola is piloting a new digital assistant, named LUie. In order to chat with LUie, you must login with your Universal ID and password below. Once logged in, if you are not part of the pilot, you will have an option to request an invite. If you are part of the pilot, a chat window will appear where you can ask LUie about your grades, schedule and other frequently asked questions anytime day or night.

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ORACLE

Congratulations!

—

You're a PeopleSoft Feature Innovator!

Congratulations! Loyola University Chicago has been identified as a PeopleSoft Feature Innovator for using PeopleSoft Chatbot Integration Framework to deploy a digital assistant for students and advisors which can answer questions personalized to the role, and, include data and transactions from PeopleSoft. The goal of our innovator program is to recognize great work that PeopleSoft customers are doing and help the customer community see what is possible, directly from customers like themselves.

Loyola Digital Assistant

Meet LUie! LUie is our intelligent enterprise digital assistant, or "chatbot", and with proper credentials provided LUie can answer questions unique to the individual such as "What is my GPA?". LUie will be available on more LUC web pages to assist students, faculty, staff and visitors with their questions – one key benefit of LUie is that he is "awake" at all hours and will respond to questions regardless of office hours, day of week, time of day! Plans are underway to build out questions and answers for Financial Aid, Academic Advising, Human Resources and the ITS Service Desk.

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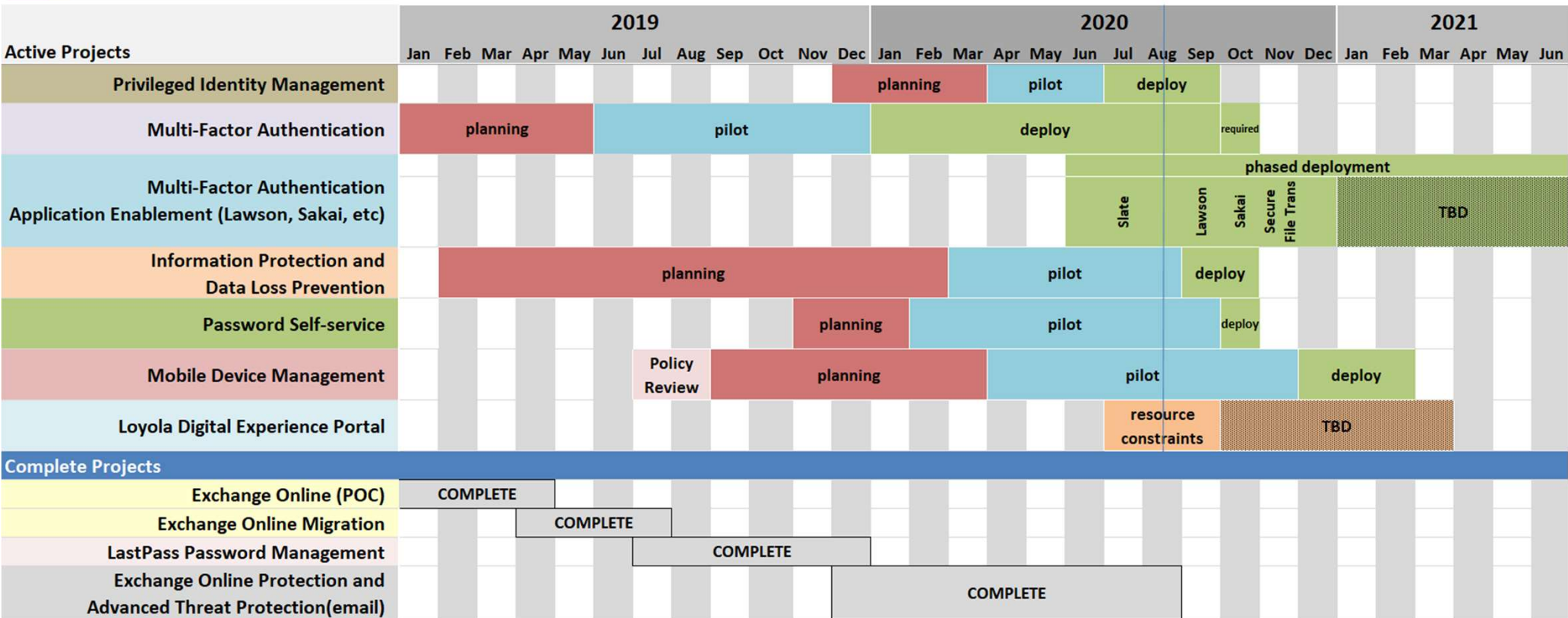**Faculty Administration Re-architecture Strategy**
- S. Malisch, J. Sibenaller

ITS Portfolio Prioritization Review
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Faculty Administration Re-architecture Strategy

Loyola Enterprise Application Data Relationships – 7/17/2019
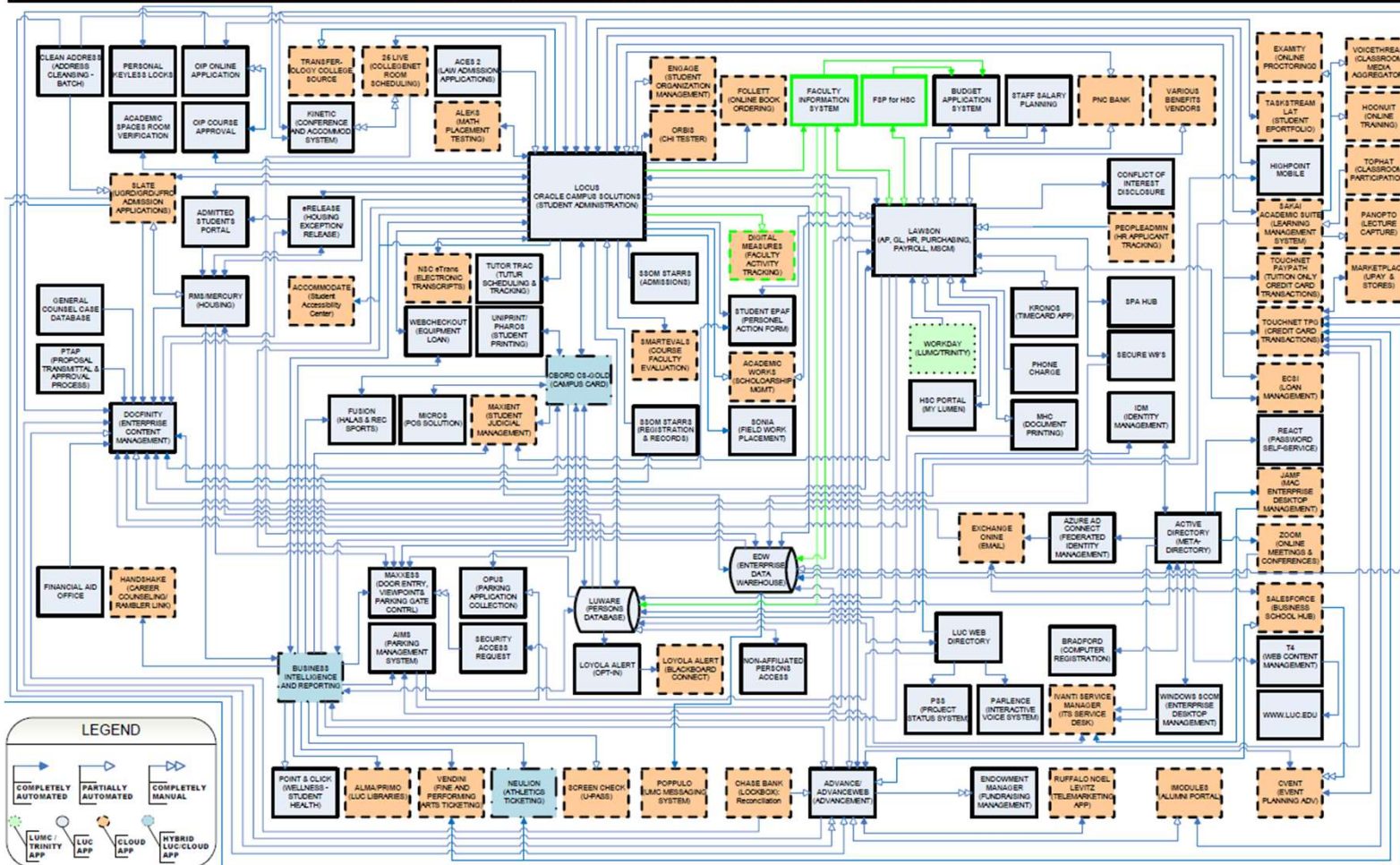
Lakeside Faculty Admin Technology

2 primary applications

~10 interfaces

Faculty Administration Re-architecture Strategy

Health Sciences Faculty Admin Technology

2 primary applications

~60 interfaces

Faculty Administration Re-architecture Strategy

Activities & Processes

- Faculty search
- Hiring
- Onboarding
- Contracts
- Letters
- Salary/Salary Adjustments
- Annual Merit File
- Fiscal File
- Annual Evaluation Process
- Promotion & Tenure
- AAMC Faculty Salary Report
- Faculty Reporting

- Demographic administration
- Roster & workload
- Appointments
- Licensure
- Compliance
- Faculty Directory
- Publications/Scholarly Works
- Faculty Marketing Approval
- Ties to Research
- Grants
- Retirement Status
- FIS/FAS/Faculty Master

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Activity/Process	Lakeside Faculty Administration	HSC Faculty Administration	Destination System
(Daily) Update faculty data • New faculty, salary changes, leaves, promotions, etc.	Lakeside Faculty Information System • Core, Salary Budget Module, Supplemental Salary, Part-Time Stipends *Some processes can be addressed by Interfolio*	HSC Faculty Master *Some processes can be addressed by Interfolio*	Lawson, HSC Faculty Information System, etc.
Annual Evaluation process	Manual process administered by schools/colleges (paperwork) *Can be addressed by Interfolio*	HSC Faculty Information System *Can be addressed by Interfolio*	N/A
Annual Merit File, Fiscal Year File	Modified data export from Lakeside Faculty Salary Planning	Modified data export from HSC Faculty Master, HSC Faculty Salary Planning	Lawson
Promotion/Tenure process	Email, Sakai *Can be addressed by Interfolio*	Email, Sakai *Can be addressed by Interfolio*	Manual updates in Lakeside FIS, HSC Faculty Master* (need to confirm with Michelle) *Can be addressed by Interfolio*
Hiring process	PeopleAdmin *Can be addressed by Interfolio*	PeopleAdmin *Can be addressed by Interfolio*	Manual updates in Lakeside FIS, HSC Faculty Master *Can be addressed by Interfolio*
Faculty Contracts/Merit Letters	Manual process* (need to confirm with Anne)	HSC Faculty Contracts System	HSC Faculty Information System, Lakeside - ???* (need to confirm with Anne)
AAMC Faculty Salary Report	N/A (HSC only)	Modified data export from HSC Faculty Master	AAMC* (how transmitted? -- need to confirm with Michelle)

Faculty Administration Re-architecture Strategy

Needs driven by One Loyola

- Reduce manual work
- Fill process gaps
- Reduce pain points
- Common processes
- Integrated workflow
- Shared integrated technology
- Common/singular data set

Execution

- Analyze current state
- Design for the future
  - Single set of technology solutions
- Iterative approach/multiple releases
- Project management
- Engage Schools
- Manage change
- Communicate

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Faculty Administration Re-architecture Strategy

Known Technology Components

Library Systems

FIS

Interfolio

Digital Measures

FAS

Faculty Master

FIS

New FAS Technology

HSC FIS

Lakeside FIS
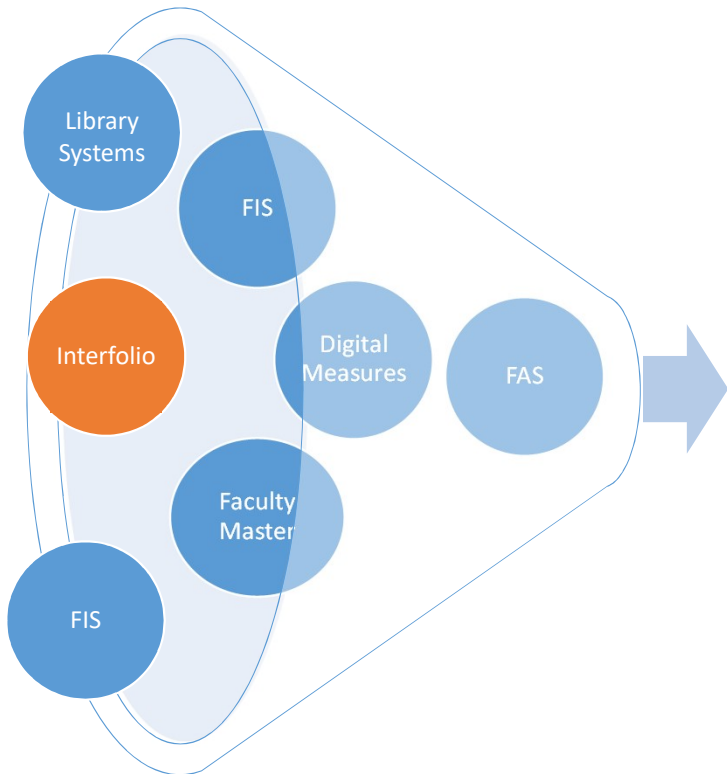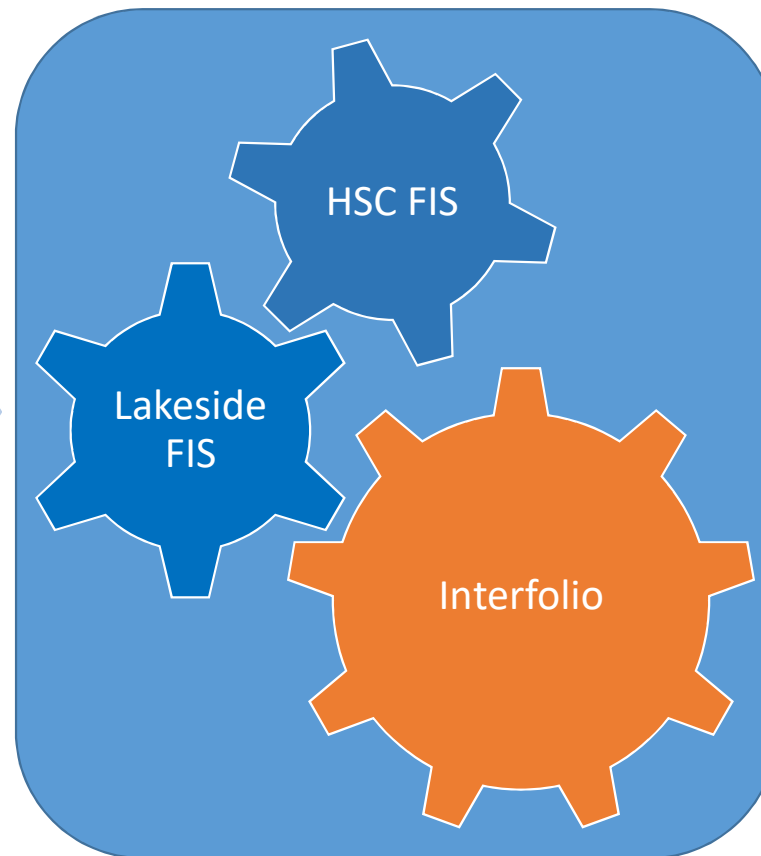
Interfolio

Interfolio Costs:
- ~$275K-$325K – initial costs
  - Implementation
  - Consulting/Discovery
- Cloud Product x 4
  - $50K-$70K per product

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Faculty Administration Re-Architecture Strategy Timeline - 08/11/2020
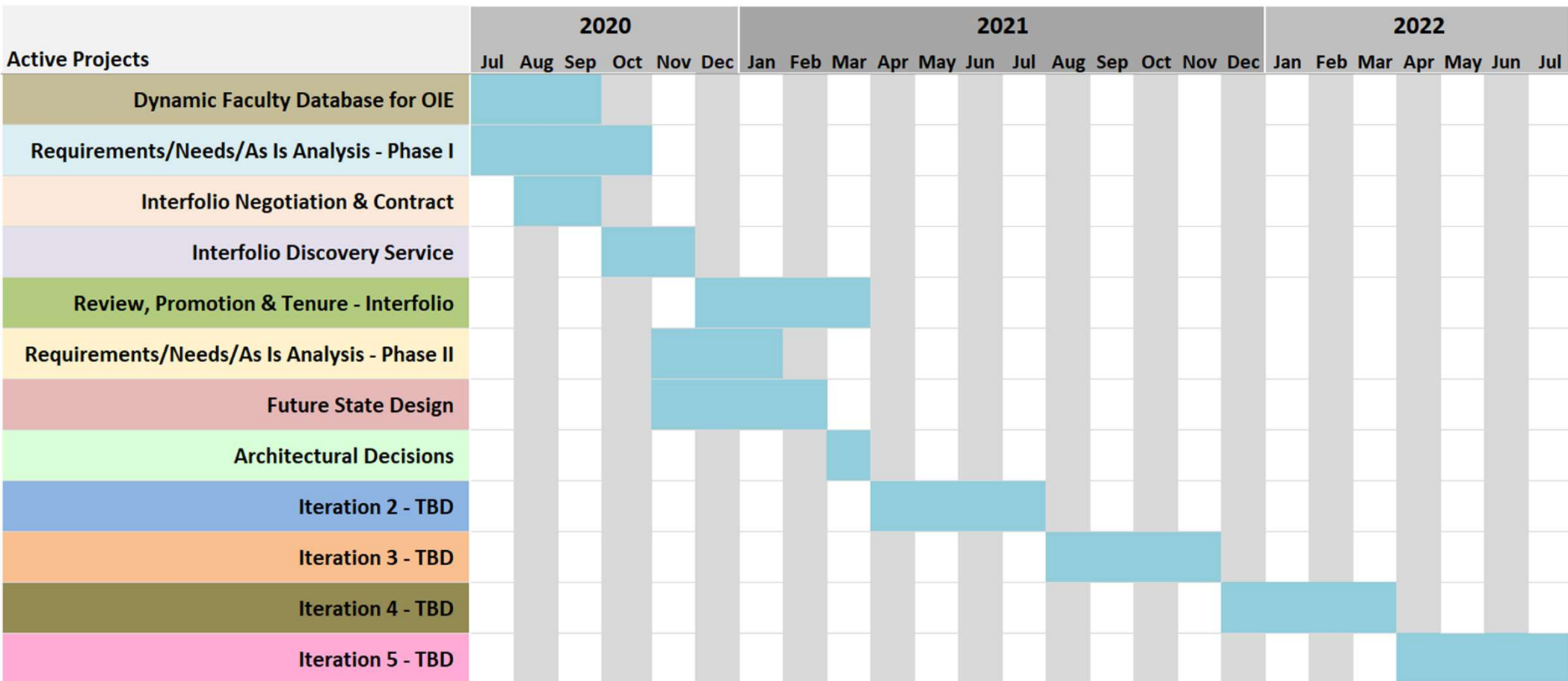
Active Projects	2020						2021												2022						
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Dynamic Faculty Database for OIE	██	██																							
Requirements/Needs/As Is Analysis - Phase I	██	██	██																						
Interfolio Negotiation & Contract		██	██																						
Interfolio Discovery Service				██																					
Review, Promotion & Tenure - Interfolio						██	██	██	██																
Requirements/Needs/As Is Analysis - Phase II					██	██	██																		
Future State Design					██	██	██	██																	
Architectural Decisions									██																
Iteration 2 - TBD										██	██	██	██												
Iteration 3 - TBD														██	██	██									
Iteration 4 - TBD																	██	██	██	██					
Iteration 5 - TBD																					██	██	██	██	██

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CONTRACT REVIEW SUMMARY - March-August 2020

Product/Solution Provider	Campus Partner	New	COVID	Renewal	Term	TOTAL
Proctortrack – New Service – Review for Provost Office	Provost Office	X	X			
Poppulo – Renewal – Review for UMC	UMC			X		
Microsoft Premier Support – Renewal – Enterprise	Enterprise			X		
Drake Hotel – New Service – Review for Residence Life	Residence Life	X	X			
Adobe – New Service for Student Remote Access – Enterprise	Enterprise, Academic	X	X			
Apporto – Renewal – Enterprise	Enterprise, Academic			X		
Labster – New Service – Review for Provost Office	Provost Office	X	X			
Comcast – Termination – Review for Residence Life	Enterprise				X	
AT&T – Renewal - Long Distance Rates	Enterprise			X		
AT&T – Renewal w/ Upgrade – WTC Internet	Enterprise			X		
AT&T – Renewal – Cross Campus and I2	Enterprise			X		
AT&T – New Service – Connection to Soveriegn and Mundelein	Enterprise	X				
Paciolan	Athletics	X				
Alverno	Wellness Center	X	X			
CME Tracker	Stritch School of Medicine	X				
LinkedIn	Enrollment Management	X				
CIS SecureSuite (SCAP)	Enterprise	X				
Synercomm (MSA)	Enterprise			X		
Guidebook (GDPR only)	Enrollment Management	X				
Google MSA	Enrollment Management	X				
Common App	Enrollment Management	X				
Get Inclusive	Facilities	X	X			
Intrasee	Student Academic Svcs, Fin Aid, Mult	X				
Sassafras - Remote Student Access to Specialized labs	School of Business, Multiple	X	X			
AssureSign - electronic signature, increment needed for COVID remote requirements	Enterprise		X			
Infor – Lawson April multi-year renewal (removed Smart Office and MSCM with 2.5% escalator cap)	Finance			X		
Kronos May multi-year renewal (removed educational services)	Finance			X		
iModules May renewal agreement – ITS review provided to Advancement	Advancement			X		
SkillSoft July license renewal – ITS review provided to HR	Human Resources	X				
BlueState Digital July CRM Assessment review provided to Advancement	Advancement	X				
Kinetic July Master Agreement – ITS review provided to Conference Services – In Progress	Conference Services	X				
PeopleAdmin July multi-year renewal – In Progress	Human Resources			X		
TouchNet July multi-year renewal – In Progress	Finance			X		
TOTALS		**19**	**8**	**12**	**1**	**32**

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ITS Project Portfolio Review

Count	Effort	Activity
190	59.6	FY21 Q1-Q2 Portfolio
31	12.3	Newly Added Projects Thru 8/10
221	71.9	Revised FY21 Q1-Q2 Portfolio
59	20.7	Projected Additional Projects Thru 12/31
58	20.1	Projected Completed Projects thru 12/31
223	72.4	Projected FY21 Q1-Q2 Portfolio Final

- 17% increase over average portfolio count of 190
- 32% increase over average portfolio effort of 55
  - Large and Extra Large projects are normally are 28% of portfolio, this period is 35%
  - Extra Large projects are normally are 9% of portfolio, this period is 23%

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FY21 Q1-Q2 ITS COVID-19 Projects

Priority	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	COVID-19 Related Projects (12)	**XLarge**	**Active**	**Q2 FY21**	**Enterprise/Multiple**
A	COVID-19 Emergency Response Governance	XLarge	Active	Q2 FY21	Office of The President
A	Cabinet Dashboard	Medium	Complete	Q4 FY20	Office of The President
A	ITS Metrics Dashboard During COVID-19 Pandemic	Medium	Active	Q1 FY21	Information Technology Services
M	CARES Student Workflow	Small	Complete	Q4 FY20	Office of The Bursar
A	Tracking and reporting for the CARES funds	Medium	Complete	Q1 FY21	Finance-Office of VP-CFO
A	Make onboarding process for new hires entirely electronic	Medium	Pending	Q2 FY21	Human Resources: System & Process
A	LCFS -Electronic Consent Forms - COVID-19	Medium	Complete	Q1 FY21	Loyola Community and Family Services
A	GPEM-LOCUS Interface re-design	Medium	Active	Q1 FY21	Grad & Prof Enrollment Mgmt
A	Enterprise wide lists for UMC communications	Large	Active	Q1 FY21	University Marketing and Communications
A	Wellness Center Telehealth Services Informed Consent Form	Small	Complete	Q4 FY20	Wellness Center
B	Residence Life-Online Roommate Agreements	Small	On Hold	TBD	Residence Life
B	Point-n-Click (PNC) Update for Respiratory Symptoms Template	XSmall	Complete	Q4 FY20	Wellness Center
A	Case Reporting/Diagnosis & Decision Dashboard	Large	Active	Q1 FY21	Office if the President
A	Contact Tracer Information Dashboard	XLarge	Active	Q1 FY21	Wellness Center
A	Go.Data solution for Virus Outbreak and Contact Tracing	Medium	Complete	Q1 FY21	Wellness Center
A	Symptom Tracker Application	Large	Complete	Q1 FY21	Enterprise/Multiple
A	Facilitate Bursar agreements for New Freshman in Fall 2020	Small	Complete	Q4 FY20	Bursar's Office
A	Explore Chatbot for COVID-19	Large	Active	TBD	Enterprise/Multiple

- denotes new items received after 6/5/2020
- denotes changes since 6/5/2020

June COVID-19 projects represents
- 3.5 FTE total (effort)
- 11% of the ITS project capacity
- 6% of the FY21 Q1-Q2 portfolio

August COVID-19 projects represents
- 5.5 FTE total (effort)
- 17% of the ITS project capacity
- 8% of the FY21 Q1-Q2 portfolio

COVID-19 support represents
- 9.8 FTE total (effort)
- 22% of the ITS support capacity

ITS Project Portfolio Review

Details in Excel Attachment:

FY21 Q1-Q2 Revised ITS Portfolio Prioritization.xlsx

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2020 ITESC Schedule

March 3rd, 2020 - Tuesday, 1:00-3:00 PM –
Cancelled due to COVID-19 Move Online
- ITESC Committees
- Calendar View of Major Rollouts
- Student Communications
- HSC Phone System

April 28, 2020 - Tuesday, 1:00-3:00 PM
- COVID-19 Summary
- LDE Foundation: Collaboration & Security - Revised Schedule
- Short-Term Technology Planning & Decisions
- Mid/Long-Term Technology Planning & Decisions

June 18, 2020 - Thursday, 1:00-3:00 PM
- COVID-19 Maintenance Savings
- Fluid Development
- Enterprise learning Hub
- Project Portfolio Prioritization

August 13, 2020 – Thursday, 1:00-3:00 PM
- TBD

September 29, 2020 - Tuesday, 1:00-3:00 PM
- TBD

December 8, 2020 - Tuesday, 1:00-3:00 PM
- Project Portfolio Prioritization