ITS Executive Steering Committee (ITESC)

Agenda and Materials – February 25, 2020

Technology@Loyola
INFORMATION TECHNOLOGY AND SERVICES | LOYOLA UNIVERSITY CHICAGO

Agenda

Institutional and Technology Change Management
- S. Malisch, J. Sibenaller

Student Experience & External Partner Technology Planning
- Enterprise Mentoring Platform – S. Malisch
- Enterprise CRM Platform – S. Malisch

Data Integrity
- J. Apa, J. Sibenaller, S. Malisch

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ITS Major Initiatives FY21-Q3-Q4

Academic and Faculty Support

- LOCUS Enhancements (8)
- Customer Relationship Management System Evaluation for SON
- Faculty Review/Administration Solution (Interfolio) (7)
- Implementation of Paper Transcript Request Process
- Stritch School of Medicine Portfolio (14)
- Review and Evaluate Proposed Research Administration Solutions

Administrative Initiatives

- COVID-19 Related Projects (8)
- Lawson/Kronos Enhancements (3)
- Advancement/Development (3)
- Space and Asset Mgmt System - Phase II
- Web Content Upgrade (T4 Sitemanager)
- Automate HSC parking/ID processes
- Conf. Services RFP – (Kinetic Replacement)
- QSB Virtual Event Platform Evaluation
- Replacement of ECSI SALNet (Flywire)
- Community Engagement (Collaboratory)

Student Technology Support

- EAB Navigate Phase II
- LOCUS Fluid Deployment
- Enhancement to the Alumni Load Process (PeopleGrove)
- Enterprise Learning Hub – Phases 2 & 3

Infrastructure

- Campus Construction Initiatives (9)
- Information Security Program (8)
- IT Disaster Recovery (6)
- LDE Foundation: Collaboration and Security (7)
- Replacement of LUC's Storage Area Network

"Loyola Digital Experience"

Continuous Service Development

- Business Intelligence/Data Warehouse (7)
- Enterprise Content Management (4)
- LDE Transformation: Digital Assistant/Chatbots (8)
- Learning Analytics - Phase 3
- Travel Mgmt. Services (Egencia) (2)
- Ticketing System – (Neulion/Vendini Replacement) (2)

Research Computing Services

- Natural Language Processing (NLP) to Enhance Computable Phenotyping
- HashMap technology to support high-performance NLP
- PCORI CAPriCORN 2020 Refresh
- Observational Medical Outcomes Partnership (OMOP) Data Mapping for CTSA/ITM
- Document Process for Charging Resources to Grants
- External REDCap 3rd Party Access

Institutional and Technology Change Management

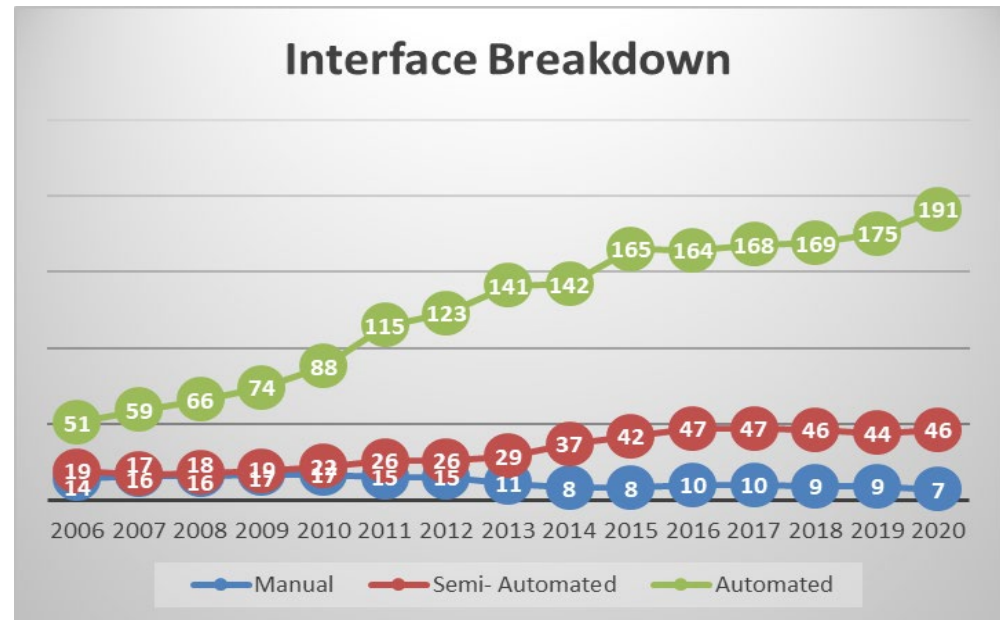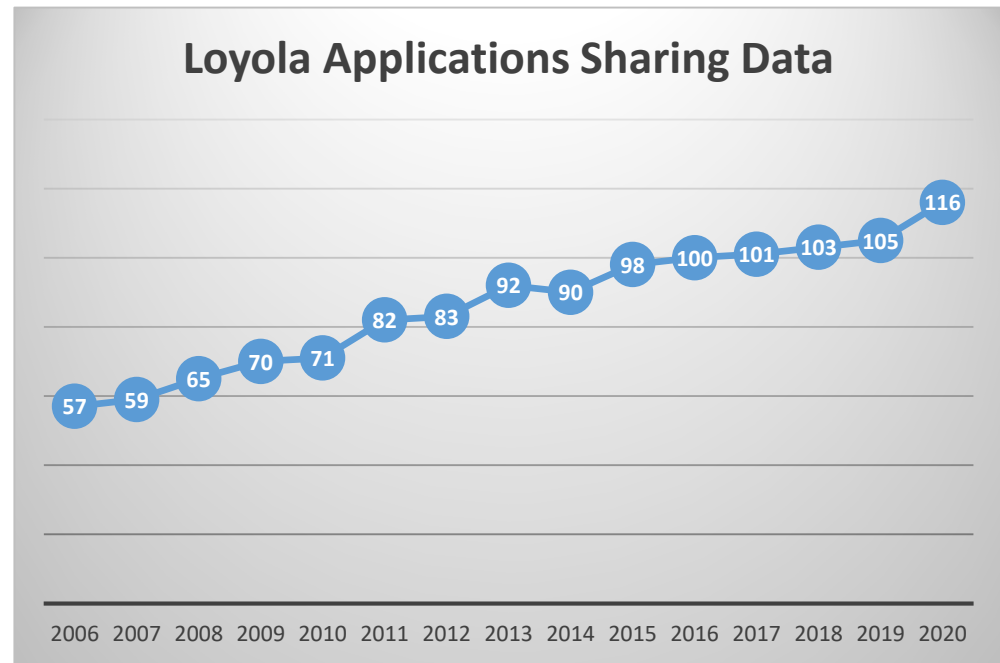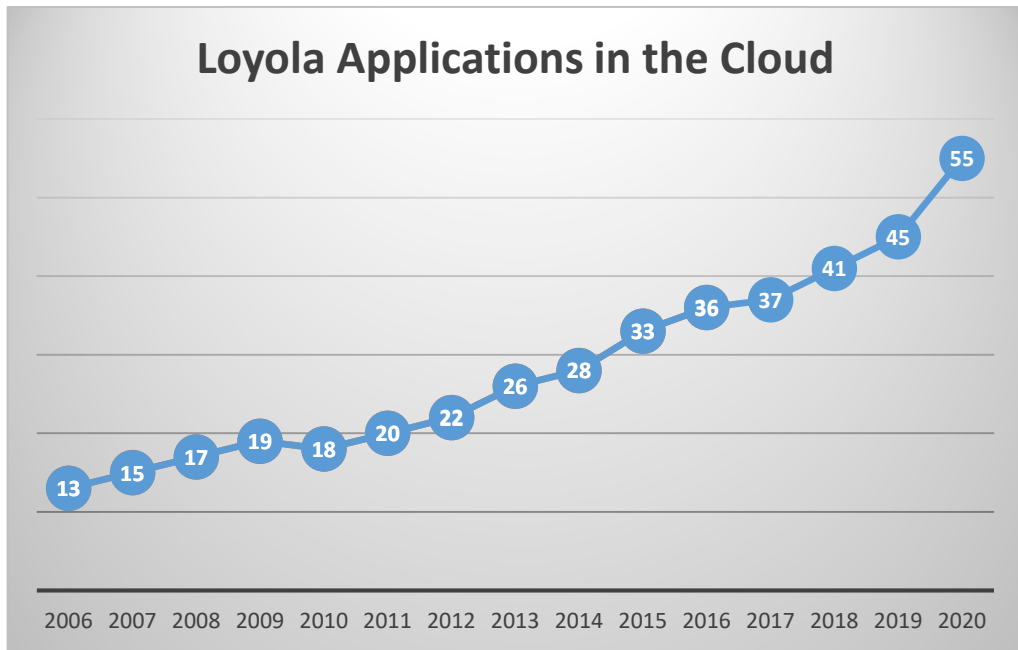**ITS Major Initiatives Calendar FY21 Q2-Q3-Q4**

Dept	PM	Project	Go Live	Audience	Count	01/02	01/09	01/16	01/23	01/30	02/06	02/13	02/20	02/27	03/06	03/13	03/20	03/27	04/03
INF	Apa	Fire Supression Assessment	1/2	ITS Facilities	5	■													
AOS	Chester	Legacy Protocols in Groups	1/4	Staff	100		■												
AOS	Chester	Legacy Protocols in Groups	1/5	Staff	130		■												
AOS	Chester	Legacy Protocols in Groups	1/6	Staff	150		■												
INF	Tapia	Azure Privileged Identity Management (PIM)	1/11	Staff	30			■											
INF	Wieczorek	Cudahy Science Construction Project	1/18	N/A	N/A				■										
DSA	Sibenaller	SHIELD Testing	1/19	Students/Faculty/Staff	25,000				■										
AOS	Chester	HyFlex Classrooms	1/19	Faculty	100				■										
IA	Wolcott	Enterprise Learning Hub - Phase 2	1/19	Students/Faculty/Staff	22,000				■										
ICR	Koral	Update of Visualization Cluster	1/31	Research	??						■								
INF	Tapia	SAN Replacement Project - Phase 1	2/1	Staff	40						■								
DSA	Vavarutsos	Revenue to Expense Model - Vers. 3	2/1	Mgmt	75						■								
DSA	Chester	MFA for Transamerica	2/4	Faculty/Staff	5,600						■								
DSA	Vavarutsos	Revenue to Expense Model - Vers. 4	2/8	Mgmt	75							■							
AOS	Chester	Legacy Protocols in Groups	2/9	Faculty	250							■							
INF	Wieczorek	DR Tests - Internet and Cross Campus	2/14	Students/Faculty/Staff	46,000								■						
AOS	Chester	Legacy Protocols in Groups	2/16	Faculty	250								■						
AOS	Chester	Legacy Protocols in Groups	2/23	Faculty	219									■					
INF	Wieczorek	Sovereign - Data / Voice Migration to LSC	2/26	Staff	30									■					
INF	Wieczorek	Mundelein Core Switch Upgrade	2/26	Students/Faculty/Staff	46,000									■					
AOS	Chester	Legacy Protocols in Groups	3/2	Students	198										■				
AOS	Chester	Legacy Protocols in Groups	3/9	Staff	200											■			
INF	Tapia	SAN Replacement Project - Phase 2	3/14	Students/Faculty/Staff	46,000												■		
INF	Schleibinger	PeopleSoft Fluid - Deployment Assistance	3/15	Students/Faculty/Staff	46,000												■		
IA	Francis	Faculty Online Contracts - Lakeside	3/15	Faculty	1,200												■		
AOS	Chester	Legacy Protocols in Groups	3/16	Staff	227												■		
AOS	Chester	Legacy Protocols in Groups	3/23	Faculty	208													■	
AOS	Chester	Legacy Protocols in Groups	3/30	Faculty/Staff (COI)	57														■

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Institutional and Technology Change Management

ITS Major Initiatives Calendar FY21 Q2-Q3-Q4

Dept	PM	Project	Go Live	Audience	Count	04/03	04/10	04/17	04/24	05/01	05/15	05/22	05/29	06/05	07/03	07/31	08/07	08/21	09/04	10/02
INF	Tapia	Opsview Upgrade / Overhaul	3/31	Staff	30	■														
IA	Bunker	ESS Life Benefits	3/31	Faculty/Staff	5,600	■														
IA	Francis	Faculty Admin-Review Promotion & Tenure	3/31	Faculty	1,200	■														
IA	Kraft	T4 Upgrade	4/10	T4 Users	??		■													
DSA	Vavarutsos	Learning Analyics - Phase 3	4/15	Schools/Deans	200			■												
IA	Bunker	Electronic Onboarding	4/30	Faculty/Staff	5,600					■										
IA	Bunker	Conference Services RFP	4/30	Enterprise	5,600					■										
INF	Wieczorek	New Firewall Implementation with UISO	5/1	Students/Faculty/Staff	46,000					■										
INF	Wieczorek	PBX DR Capabilities - Mundelein	5/1	N/A	N/A					■										
INF	Schleibinger	Data "In Motion" Encryption Project	5/1	Students/Faculty/Staff	46,000					■										
AOS	Walker	Sakai MFA	5/15	Sakai Users	3,000						■									
DSA	Chester	DLP - Enforce Policy	5/15	Enterprise	> 1,000						■									
DSA	Pardonek	SCAP Server Hardening	5/19	ITS Server Ops	10							■								
DSA	Vavarutsos	HR BI Dashboard	5/31	HR/Mgmt	150									■						
IA	Walcott	Cold Fusion Upgrade	5/31	Web Apps Users	??									■						
INF	Wieczorek	Fibre Installation for DR - North Campus	6/1	N/A	N/A									■						
INF	Schleibinger	Locus Multifactor Project - Phase 2	6/1	Students/Faculty/Staff	20,000									■						
IA	Adams	Financial Aid Loan Disbursements	6/30	Students	10,000										■					
IA	Yun	AudienceView - Athletic Ticketing	6/30	Enterprise	46,000										■					
INF	Schleibinger	MS SQL - Migration to New Cluster	6/30	Students/Faculty/Staff	Varies by DB										■					
IA	Chester	Collaboratory Community Engagement	7/30	Faculty/Staff	5,600											■				
INF	Tapia	Shibboleth Upgrade	8/1	Students/Faculty/Staff	46,000											■				
IA	Fitzgerald	EAB Navigate - Phase 2	8/15	Students/Faculty/Staff	46,000												■			
INF	Chester	Pass Thru Authentication	8/15	Students/Faculty/Staff	46,000												■			
DSA	Francis	Space and Asset Management - Archibus (Phase 2)	8/31	Students/Faculty/Staff	20,000													■		
IA	Francis	Faculty Activity Reporting (Interfolio F180)	9/30	Faculty	1,200															■

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FY20 Application and Integration Changes…

Loyola Applications Sharing Data

Loyola Applications in the Cloud

Interface Breakdown

Institutional and Technology Change Management

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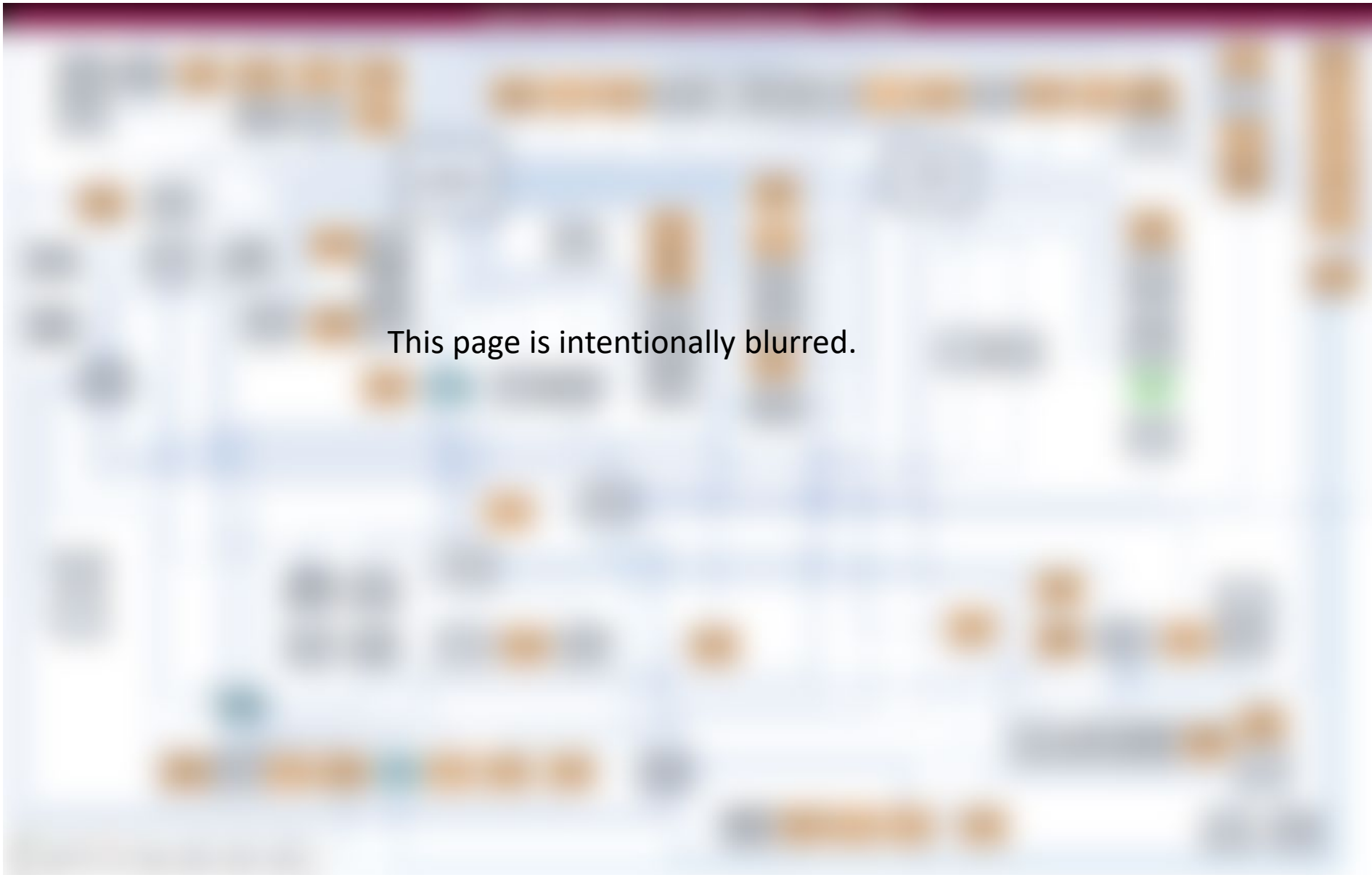
2020 Enterprise Application Relationship Diagram

116 Enterprise Applications
- 61 LUC Data Center
- 55 Cloud

240-250 Interfaces
- 7-10 Manual
- 45-50 Semi-automated
- 190-200 Fully-automated

Institutional and Technology Change Management

2020 HSC Application Relationship Diagram

80 HSC Data Center Applications

140-150 interfaces

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Student Lifecycle

Before	During	After
Recruitment & Enrollment	**Student Engagement & Success**	**Alumni Relations & Advancement**

Increase Customer Lifetime Value

Customer Acquisition	Customer Retention	Customer Loyalty

Data Flow Issues → Workflow Issues →

Gartner.
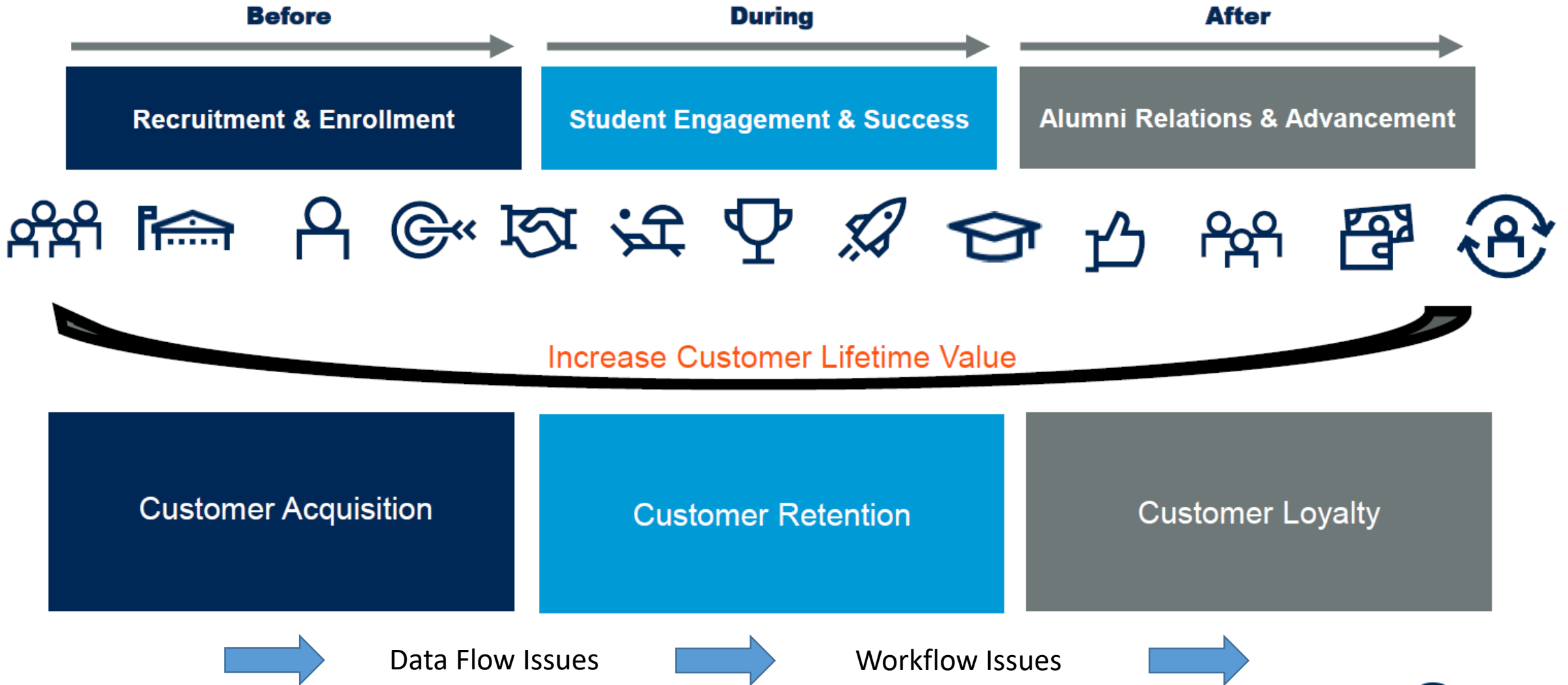
Higher Education is Investing in CX and CRM

Changes in Technology Investments
Percentage of Higher Education Respondents

2021 CIO Agenda Survey

■ Percentage of respondents decreasing investment   ■ Percentage of respondents increasing investment

Technology area	Decreasing	Increasing
Cloud services/solutions	5%	65%
Cyber/information security	2%	64%
Business intelligence/data analytics	1%	59%
Customer/user experience	1%	49%
Customer relationship management solutions		43%
Digital workplace	3%	43%
Process automation		35%
Software development or upgrades	11%	35%
Digital business initiatives	2%	35%
API architecture	1%	32%
Communications/connectivity	9%	31%
Artificial intelligence/machine learning	2%	29%
Core system improvements/transformation	6%	29%
Business continuity management	4%	26%
Mobile applications	2%	26%
Enterprise resource planning	16%	23%
E-commerce/citizen portal/website	5%	20%
Infrastructure and data center	43%	20%
Internet of Things	1%	15%
Containerization	4%	11%

n = 110 Higher Education
Q. What are the technology areas where your enterprise will be spending the largest amount of new or additional funding in 2021 compared with 2020?
n = 95 Higher Education
Q. What are the technology areas where your enterprise will be reducing funding by the highest amount in 2021 compared to 2020?
Source: 2021 Gartner CIO Survey
Showing technologies with at least 10% of Higher Education respondents reporting plans to increase spending
ID: 722433

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Gartner.

Technologies Enabling Improved Student Experience

CRM

- **Enterprise Class CRM Platforms**
- **Purpose Built Tools for Recruit, Engagement & Advancement**

Data

- **Data Hubs**
- **Master Data Management**
- **Customer Data Platforms**

Emerging Technologies

Web

AI

Mobile

Chatbot

Analytics

Gartner

Student Experience Objectives

Emotional

Belonging

- Engaged
- Affinity
- "Promoters"

Cognitive

Relevant

- Personalized
- Custom
- Satisfying

Physical

Easy

- Frictionless
- Uncomplicated

Gartner
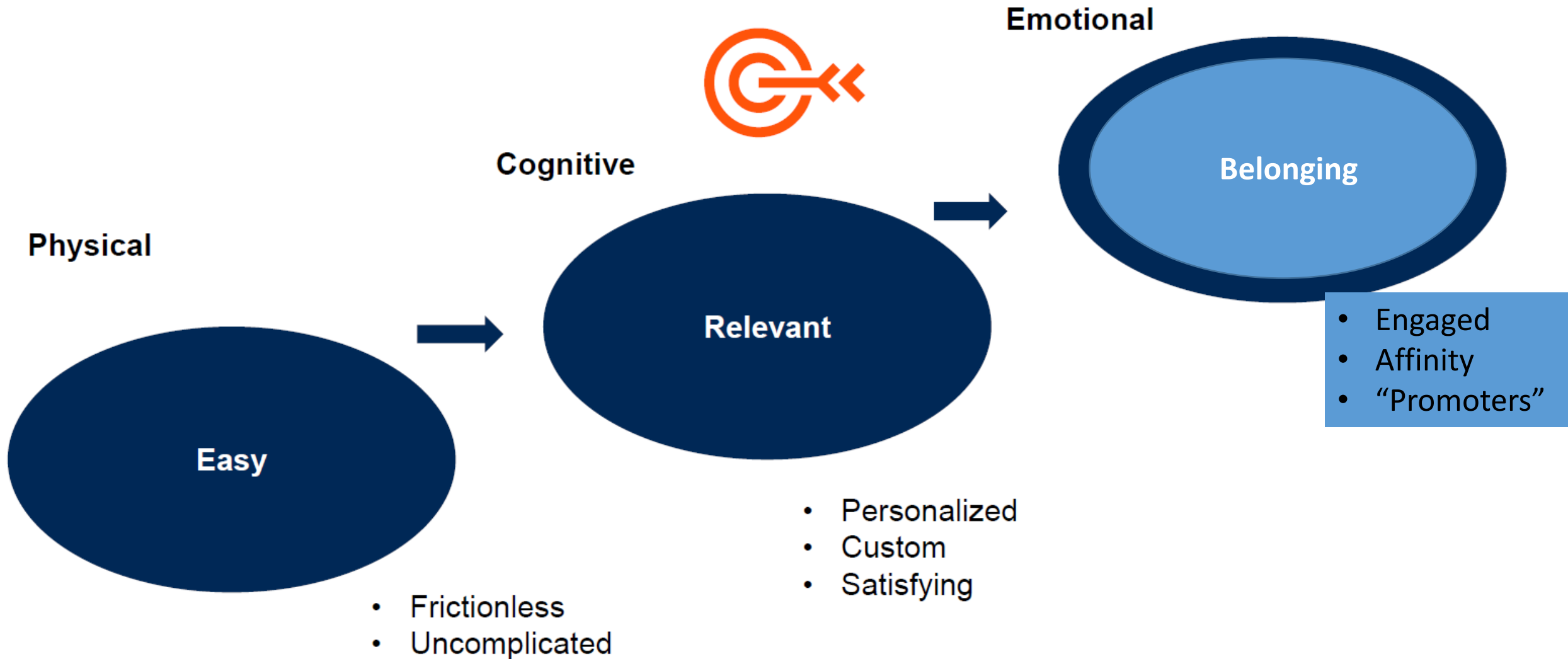
Recommendations

✓ Develop a deep and detailed knowledge of the challenges facing your students.

✓ Ensure your student experience team contains a broad cross-section of stakeholders including Voice-of-the-Student.

✓ Move progressively from a shallower to deeper understanding of personalization maturing your focus from making the experience "easy" to making it "relevant".

✓ Use data, CRM and emerging technologies such as AI and chatbots to power personalization in incremental and scalable ways.

Gartner

Mentoring Platform - PeopleGrove

- QSB launched a pilot for the Loyola Mentors program using PeopleGrove in Spring 2020

- The top 3 goals developed by the QSB implementation team were:
  1. Scale Business Readiness Mentorship (both for the formal program connected to BSAD 220 sections and generally for all Quinlan students)
  2. Achieve higher quality Flash (1-time) connections for both students and alumni
  3. Engage with Alumni & Friends of the University by building a community where they can connect and contribute in real ways to each other and students

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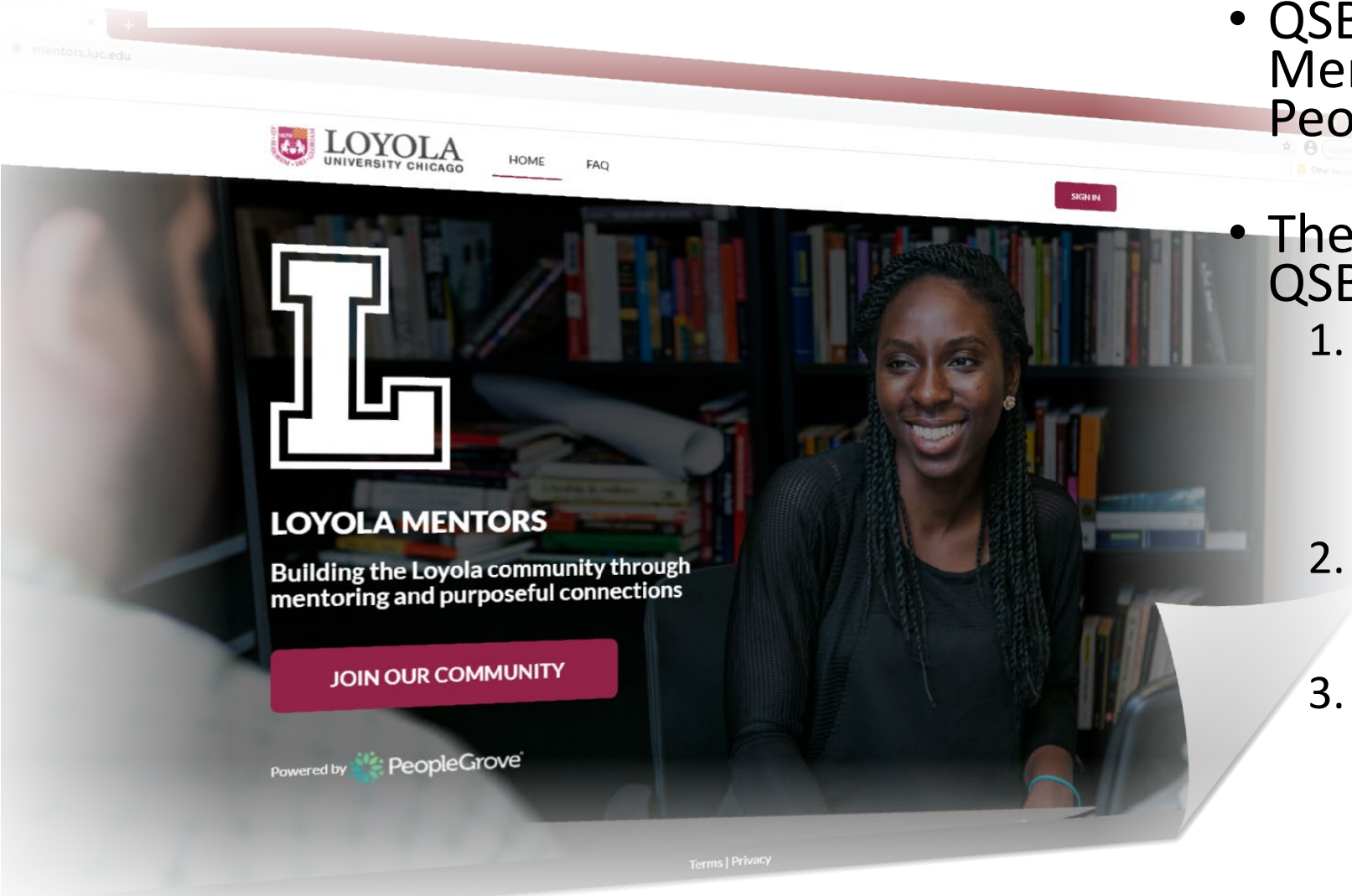
Mentoring Platform - PeopleGrove

Dashboard (a.k.a. Home)

Student landing page upon login. It provides quick access to recommended connections, profile information, established connections, etc.
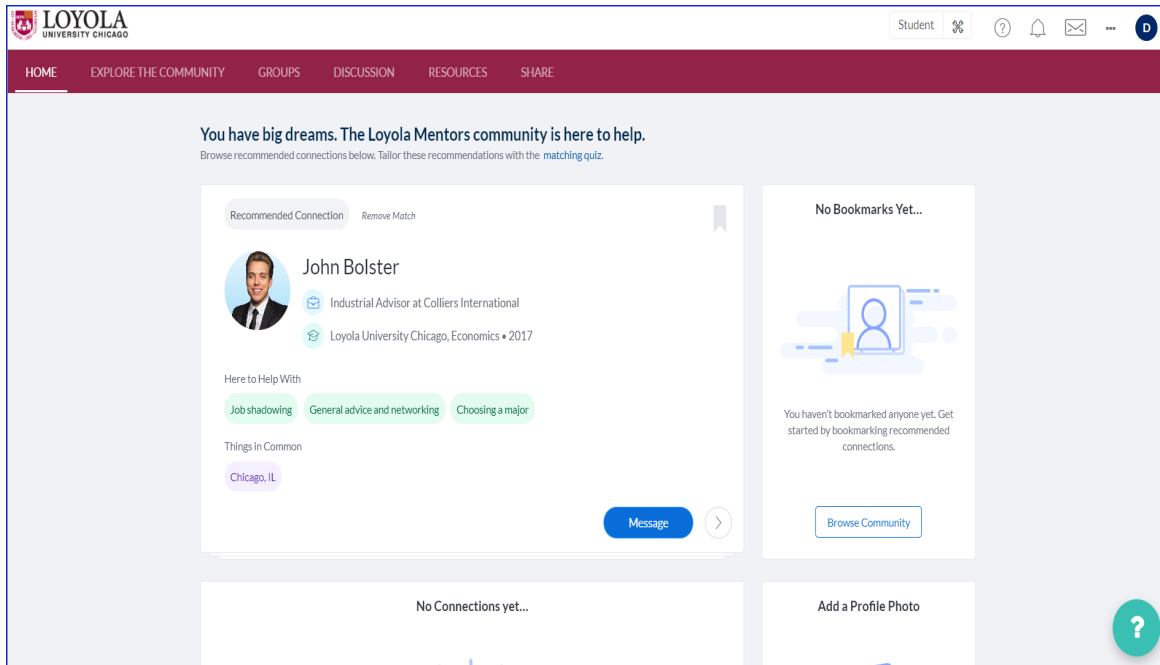
Explore the Community

- This tab is where students can explore to find more possible connections
- Searches can be performed and Filters can be added to narrow the view
- Real-time chats can be established within the platform. Those currently online are marked with a green dot
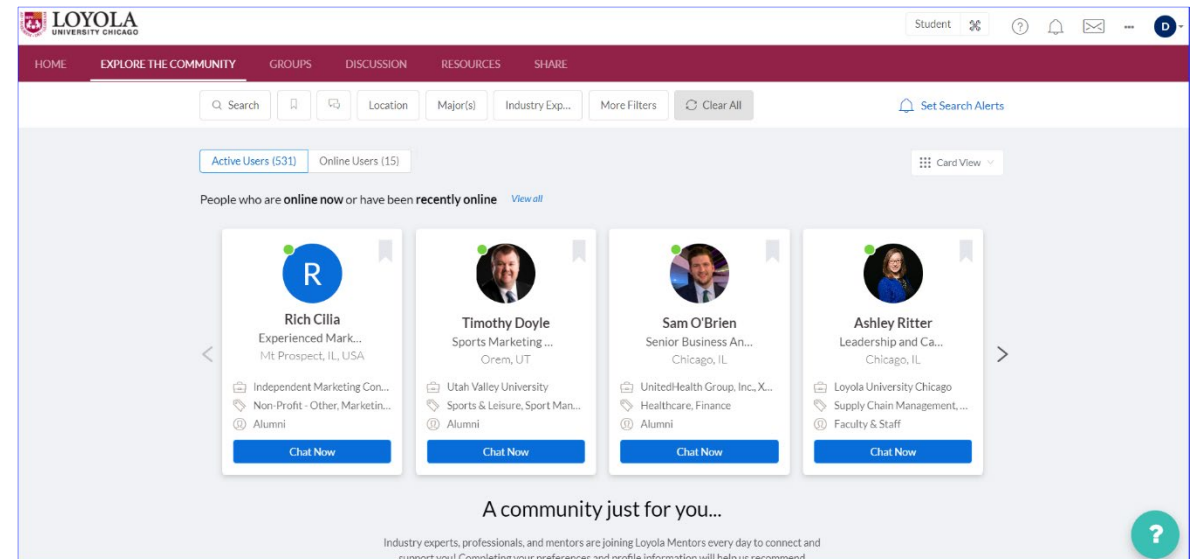
Metrics

Total Users

941

Total number of users who have ever completed signup as of Feb 19, 2021.
Read More

Total Users 📖

View messages sent by All User Types ▾ for All Message Types ▾ during All Time 📅 grouped by 3 Months ▾   📊 View Page Data

Total number of messages sent between all users ⓘ

2,599

Total cumulative number of messages sent through all t...
Read More

Total messages 📖
User Types ▾

Total message threads

Response rate
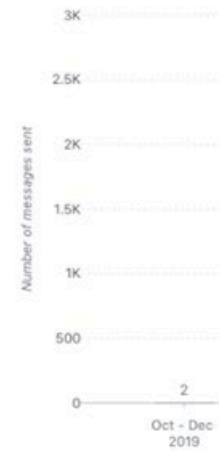
View connections initiated by All User Types ▾ during All Time 📅 grouped by 3 Months ▾   📊 View Page Data

Users with connection

437

Total number of unique users with a connection.
Read More

Percent of users with a connection

46.44%

Percent...
Read Mo...

Users with connection 📖
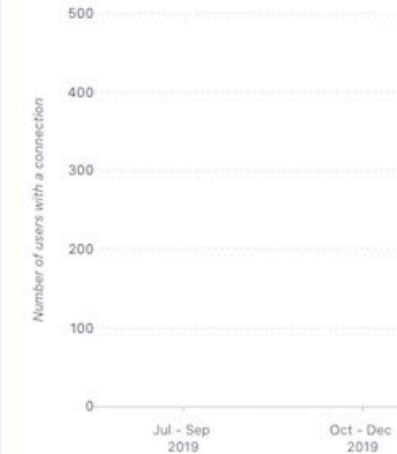
Actionable Steps

14

Total Submitted Answers

👍 **11** Yes   👎 **3** No

Answers for the actionable step question from the post-connection survey.
Read More

Would Recommend

32

Total Submitted Answers

👍 **30** Yes   👎 **2** No

Answers for would recommend question from the post-connection survey.
Read More

Meaningful Interactions

45

Total Submitted Answers

Strongly Agree	33
Somewhat Agree	9
Agree	3
Somewhat Disagree	0
Strongly Disagree	0

Answers for meaningful interaction question from the post-connection survey.
Read More

Filter reviews by All User Types ▾ from All Sources ▾

⭐ Overall Breakdown   ⬇ Download CSV

4.69   **51**
Avg. Star Rating   Total Submitted Feedback

5 Star	34
4 Star	8
3 Star	3
2 Star	0
1 Star	0
No Rating Provided	6

Average Ratings by Month   ⬇ Download CSV
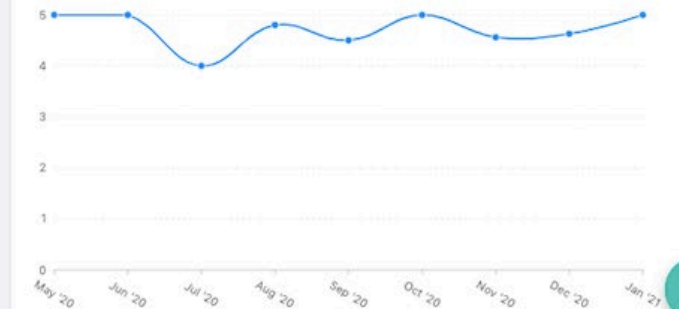
PeopleGrove

Mentoring Platform - PeopleGrove

- ITS has coordinated demos for several interested schools and departments:
  - SSOM – Nov 2019
  - Arrupe College – Dec 2019
  - School of Law – Feb 2020
  - School of Nursing and Parkinson School – Dec 2020
  - Human Resources (Anti-Racism Initiative) – Dec 2020
  - SSOM – Stritch Peer Support Network (SPSN) – Feb 2021

- <u>Recommendation</u>: Adopt PeopleGrove as enterprise mentoring platform across Loyola
  - Offers consistent experience for mentors, mentees
  - Creates single platform with which the University can capture, share, and report on participation and engagement
    - Increases likelihood of data standardization and data model interpreted in similar ways
    - Simplifies integrations – APIs for Handshake, Zoom and Salesforce through *GroveConnect*
  - Optimized investment; avoid unnecessary variety and duplication

- <u>Cost</u>
  - Plan for FY22 budget placeholder
  - Needs to be structured with incentive for schools/units to participate

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CRM Platform - Salesforce

Become a Connected Campus

Go from siloed data to actionable insights with dedicated solutions across the entire educational journey. With education technology solutions for recruitment and admissions, student experience, advancement, alumni engagement, and institution operations, your campus can come together to create personalized experiences at scale using one integrated CRM for higher education.

STUDENT EXPERIENCE

ADVANCEMENT & ALUMNI ENGAGEMENT

- QSB adopted Salesforce Lightning Sales Cloud in the Business Leadership Hub to manage relationships and to engage partners

- The Centers that have licensed users are the following:
  - Baumhart Center
  - Family Business Center
  - Executive and Professional Education Center
  - Loyola Limited
  - Supply and Value Chain Center

- Over 5,000 contacts in Salesforce

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CRM Platform - Salesforce

CRM Platform - Salesforce

CRM Platform - Salesforce

CRM Platform - Salesforce

- The School of Nursing and The Parkinson School are evaluating CRM platforms. ITS has coordinated demos. Salesforce meets most needs but price points may be too high if schools are left to fund independently. Alternative funding models should be considered.

- <u>Recommendation</u>: Explore and validate opportunity to adopt Salesforce as enterprise CRM platform available to schools and units across Loyola
  - Offers consistent experience and allows us to develop expertise in our use
  - Creates single platform with which the University can capture, share, and report on participation and engagement
    - Increases likelihood of data standardization and data model interpreted in similar ways
    - Simplifies integrations
  - Optimized investment; avoid unnecessary variety and duplication
  - Has potential to mature into a "Student Engagement Hub"

- <u>Cost</u>
  - Plan for FY22 budget placeholder
  - Needs to be structured with incentive for schools/units to participate

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Agenda

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Student Experience & External Partner Technology Planning
- Enterprise Mentoring Platform – S. Malisch
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Data Integrity
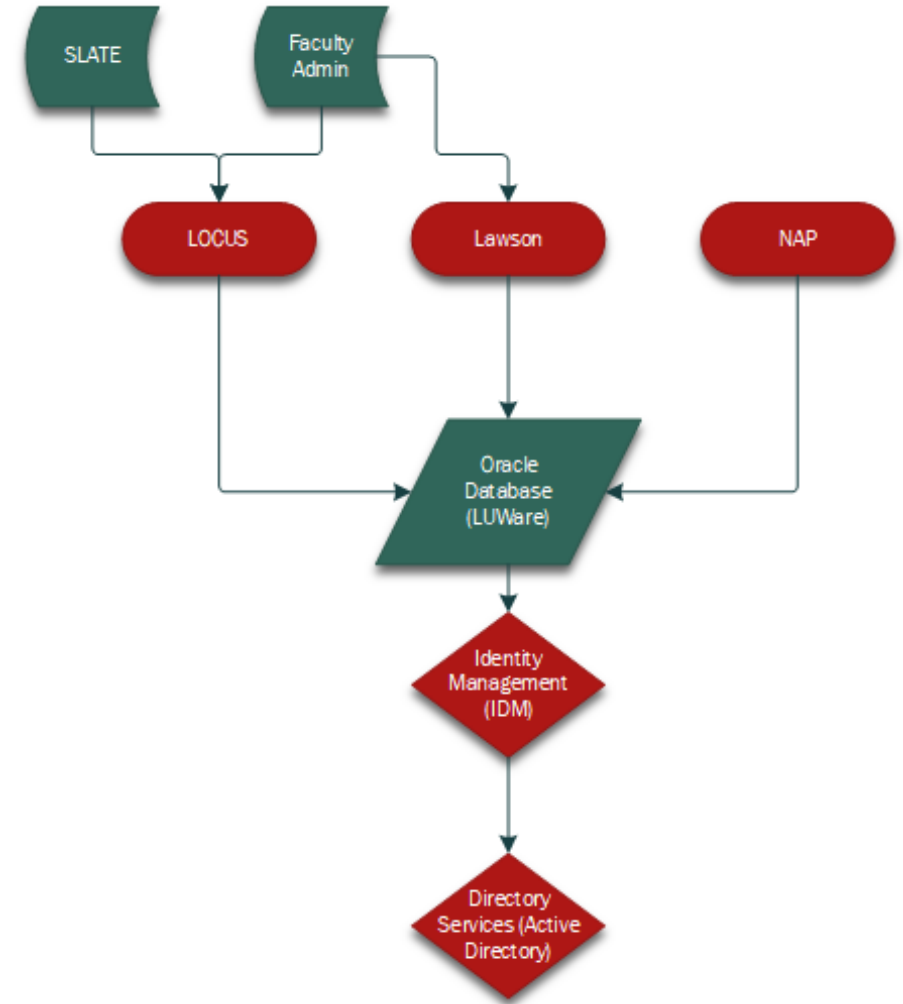- J. Apa, J. Sibenaller, S. Malisch

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Data Integrity

Current Identity System

- LOCUS / Lawson / NAP
- Oracle Database (LUWare)
- Identity Management (IDM)
  / Directory Services (Active Directory)

Application Data

- LUWare
- Active Directory
- Loyola Web Directory

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Data Integrity

System Review

- Internal ITS Review

- Findings fell into three distinct categories

  - **Sources of Data**: Having various sources of data is not uncommon. Lacking a consistent source of truth can cause issues.

  - **Data Inconsistencies**: Data is not always represented accurately across all systems. Data updates and edits are inconsistent or manual.

  - **Conflicting/Complex Business Rules**: Business rules that were created when IDM was first implemented may no longer apply or need to be revisited.

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Data Integrity

Sources of Data:
- **Multiple Sources** – Conflicts
- **Lack of Updates** – Lawson to Locus
- **NAP for Employees** – JFRC, Faculty Admin

Data Inconsistencies:
- **Lack of Consistent Sources** – LUWare, Active Directory, Web Directory
- **Missing / Stale Data** – Campus Location, Office Location, Manager
- **Attribute Repurposing** – Employee Status

Conflicting/Complex Business Rules:
- **Roles** – High Role Designates Primary Status
- **Redundant Attributes** – Not Updated/Used
- **Application Processes** – Differing Data Collected

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Data Integrity - Examples

Data Component/Category	Impact Area
Incorrect/missing local-home address, supplemental address	Mailings, SHIELD Roster
Incorrect/missing emergency contact info	Situational
Incorrect/missing alternate-personal email address	Training follow-up
Incorrect/missing cell phone numbers	Contact, SHIELD Roster
Department/location mismatch	Training follow-up
Duplicate LIDs	Processing; Breaks workflow
Incorrect/outdated department/division names	Processing, Training follow-up
Incorrect/outdated supervisor hierarchy	Processing, Training follow-up
High Role inconsistencies	Processing, Assignments
Highest degree, preferred degree tracking and assignment	Processing; Breaks workflow
Faculty data	
faculty attributes, status, track, rank	Processing; Breaks workflow
part time versus adjunct versus full time	Processing, Assignments
source of truth	Processing; Breaks workflow
Grant information, difficulty tracking attributes across platforms	Processing; Breaks workflow

Local Address

SHIELD Testing Dashboard

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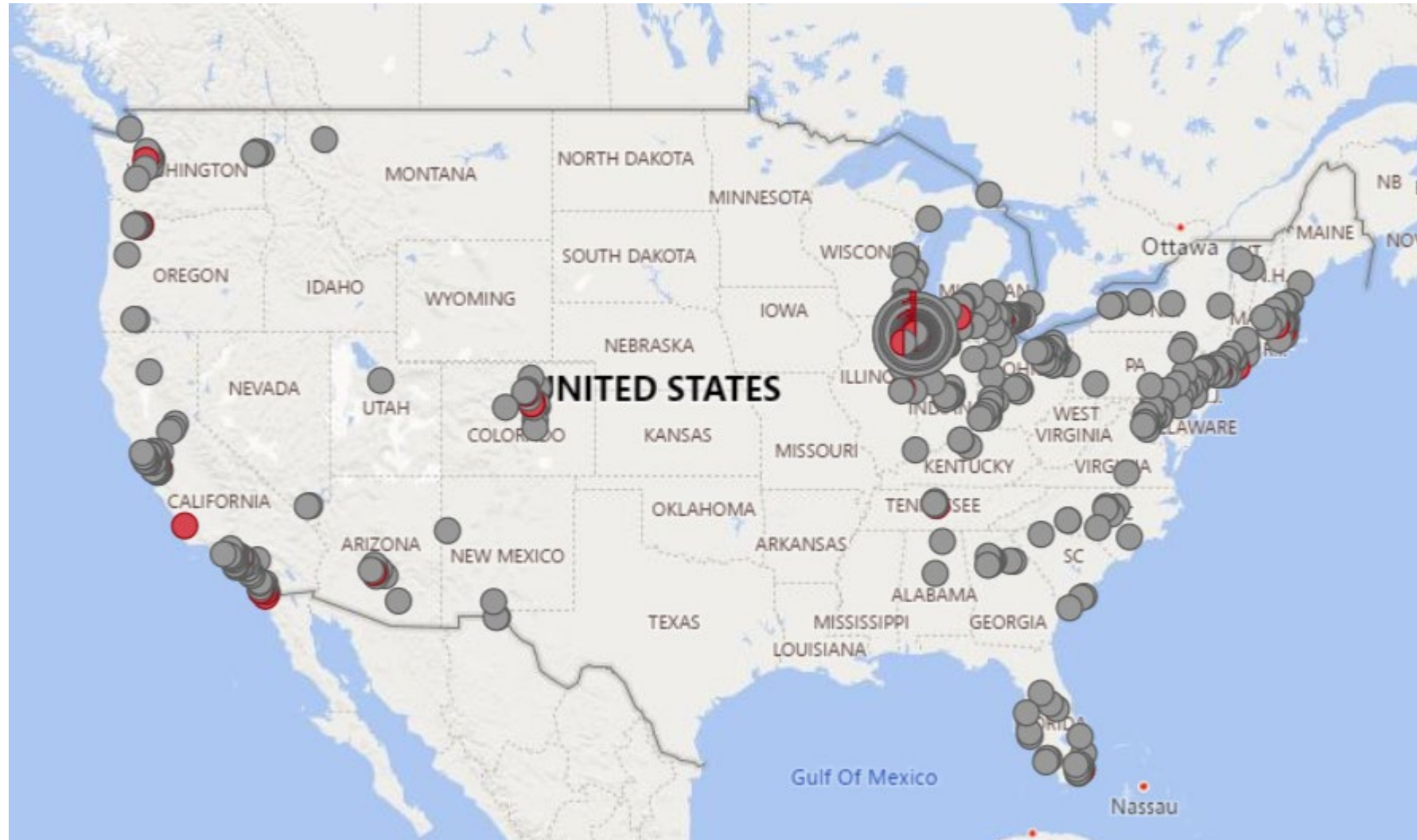
HI Role

SHIELD Compliance Testing Dashboard

Tests by Week

Classification	HI_Role	Week starting on: 02/14/2021 (8)	Total
		27	27
FACULTY/STAFF	CONTRACTOR	14 ✓	14
	EMERITUS	1 ✓	1
	FACULTY	222 ✓	222
	JESUIT	2 ✓	2
	SPONSORED_GUEST	15 ✓	15
	STAFF	562 ✓	562
	Total	**816**	**816**
STUDENT	ENROLLED_STUDENT	4,124 ✓	4,124
	STUDENT_WORKER	1,003 ✓	1,003
	Total	**5,127**	**5,127**
Total		**5,970**	**5,970**

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Blank Department

SHIELD Compliance Testing Dashboard

Department/Location Mismatch

Lawson – Department

Human Resources: Sys & Process

Web Directory

Human Resources: Sys & Process

Department/Location Mismatch

ISM – Department

Human Resources: Compensation

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Some Stats from the BI team

HI_Role	No LAWSON Birthdate	No LOCUS Birthdate	Birthday mismatch between IDM3/LUWARE and LAWSON	No Gender in LAWSON	No Gender in LOCUS	Gender mismatch between LAWSON and LOCUS	No LAWSON Address	No LOCUS local or permanent/ home address	No LAWSON home phone
STUDENT_WORKER	-	-	23	6	-	18	-	-	12
FACULTY	-	224	52	2	-	17	-	1,642	63
STAFF	-	189	41	20	11	8	-	1,101	93
NONE	-	1	-	-	1	-	-	1	-
	-	414	116	28	12	43	-	2,744	168

Students enrolled Term	No LOCUS phone	Students with International Perm address who are enrolled in on-campus classes and do not have a local address within 50 miles of LUC
Spring 2021	35	42
Summer 2021	11	0
	46	42

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Data Integrity Recommendations

- Confirm leadership commitment to make data integrity, data cleanup and data governance a priority project
  - Focused on One Loyola vision and increased integrations across systems and campuses
  - Needed for success of larger enterprise changes

- ITS will champion and provide Project Management support; close partnership with OIE; engage units as appropriate
  - Not just technology, work to be done in the units
  - Current efforts to support project by project is not sustainable/cost effective
  - Repurpose Role in BI

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2021 ITESC Schedule

February 25, 2021 - Thursday, 10:00 AM-12:00 PM
- Institutional and Technology Change Management
- Student Experience & External Partner Technology Planning
- Data Integrity

April 22, 2021 - Thursday, 10:00 AM-12:00 PM
- TBD

June 17, 2021 - Thursday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization

August 12, 2021 - Thursday, 10:00 AM-12:00 PM
- Start of School Update
- TBD

October 21, 2021 - Thursday, 10:00 AM-12:00 PM
- TBD

December 14, 2021 - Tuesday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization

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