ITS Executive Steering Committee (ITESC)

Agenda and Materials – December 12, 2019

Agenda

Data Loader-Parent Load, Student Load
- M. Halverson, M. Karwacki

Learning Portfolio Platform
- P. Green, B. Tate

Fluid Demo
- R. Vazquez, L. Adams

Project Portfolio Prioritization
- S. Malisch, J. Sibenaller

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THE VALUE PROPOSITION

Maintaining, updating, and augmenting data about current parents helps better position Loyola to actively and comprehensively engage with this important constituency.

OBJECTIVES

- Technology-oriented: Create an automated process for importing current undergraduate parent/student information into Advance – the Advancement Division's database.

- Strategy-oriented: Use the parent/student data to systematically engage current parents.

PREVIOUS STATE – SUMMER, 2018

- The existing process for automatically importing parent/student load into Advance was neither documented nor functional.

- Parent/student data had not been entered since the entering 2015 cohort.

- There was no other actively-maintained source for this information at LUC.

- Advancement and ITS had recently finished creating the process for importing graduate (i.e. new alumni) information.

A CROSS-DIVISIONAL PARTNERSHIP

- Advancement and ITS partnered with a consultant to create specs for the import process.

- Enrollment Management provided input about how to obtain the requisite data points from Slate – and to do so only for currently enrolled students.

- ITS created and documented the coding.

- Advancement and ITS engaged in an extensive testing process.

DATA-SPECIFIC OUTCOMES AND NEXT STEPS

- 22,507 parent records and 12,456 student records were imported into Advance between June and September 2019. Less than 2% of the records required manual review.

- Advancement is updating and supplementing this data using a variety of proprietary tools (e.g. National Change of address screenings, wealth screenings). This is consistent with how alumni data is maintained.

- Advancement, ITS, and Registrar are currently building a process to track student attrition and reflect it in Advance.

PROGRAMMATIC PLANS - SOLICITATION

Phone – utilize student callers to update parents on campus news/events.

Mail – share campus updates & impact of giving.

Email – share campus updates, event invitations, impact of giving.

PROGRAMMATIC PLANS - ENGAGEMENT

Men's Basketball pregame reception

- Entering year 2 (sold out in 24 hours in 2019)
- Event serves to ID parents who have the capacity to make leadership level gifts and/or interest in volunteering

PROGRAMMATIC PLANS - ENGAGEMENT

Long-term Plan – Develop a Parent Leadership Council

- To consist of Damen Society level ($1K+) donors who want to be actively engaged on campus

- Council will eventually develop into a volunteer-style board

- ID prospects with capacity to make a major gift

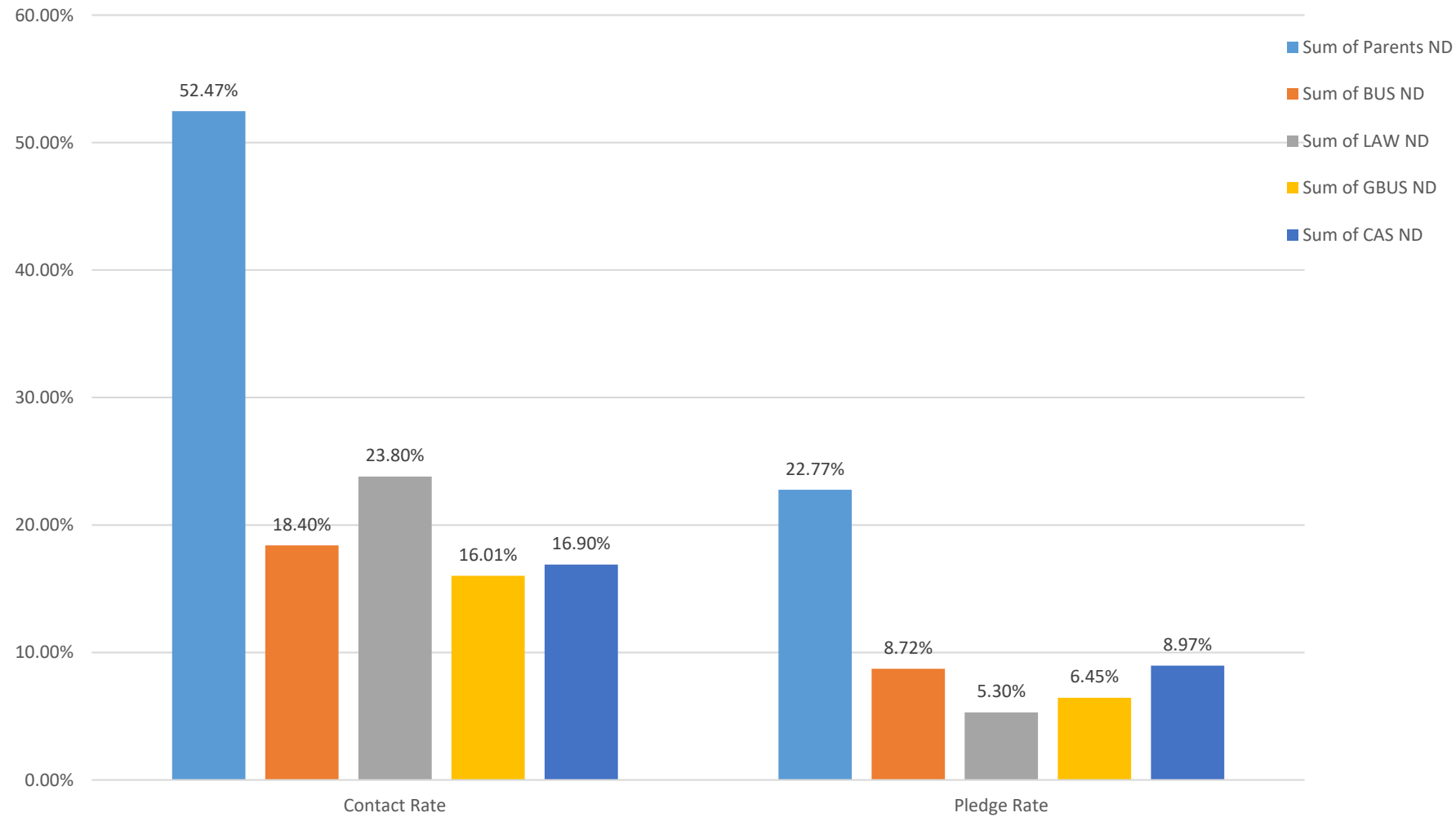# Early successes: Phonathon calling

$45,895 pledged
22% pledge rate
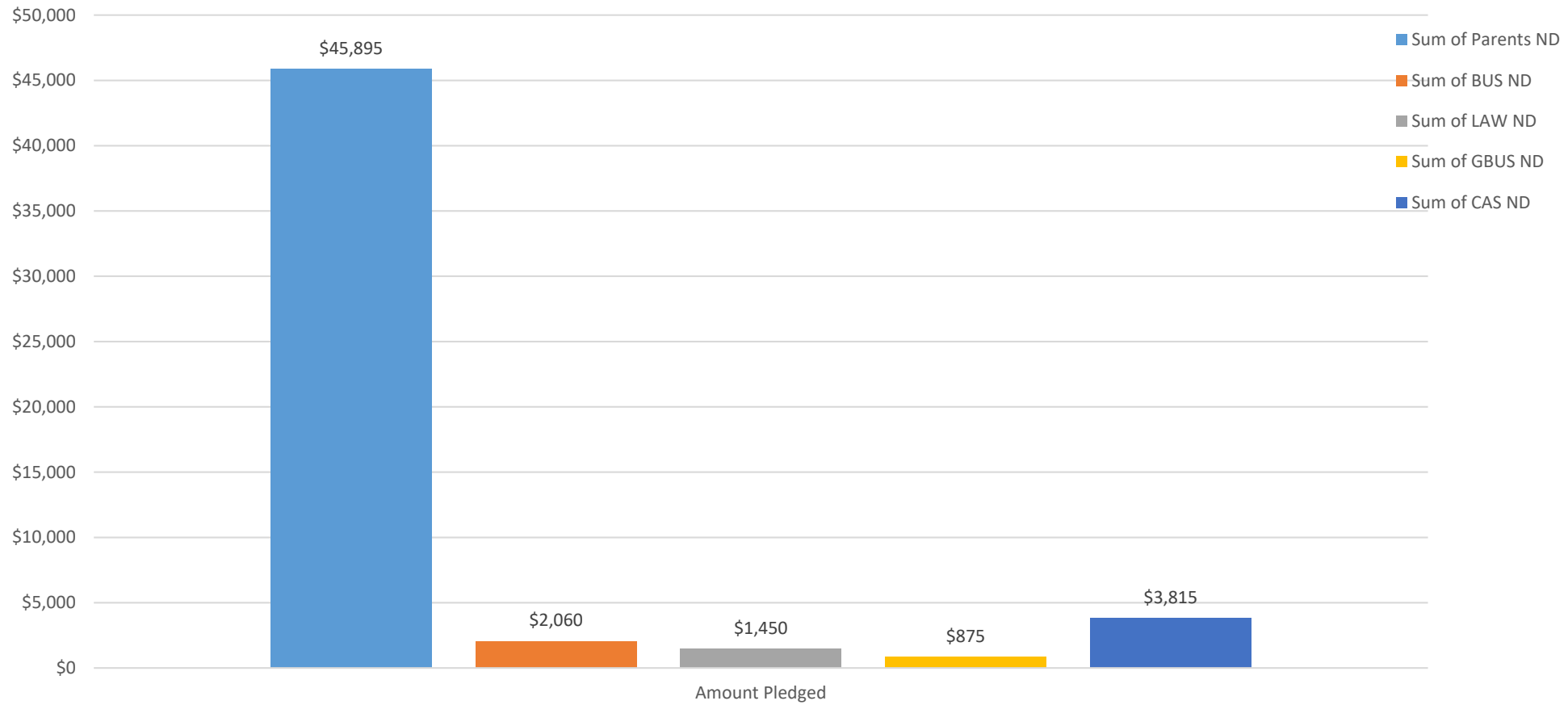**58% of gifts made by credit card**
$142 average gift

PLEDGE & CONTACT RATE COMPARISON – NONDONORS

Legend:
- Sum of Parents ND
- Sum of BUS ND
- Sum of LAW ND
- Sum of GBUS ND
- Sum of CAS ND

Contact Rate:
- 52.47%
- 18.40%
- 23.80%
- 16.01%
- 16.90%

Pledge Rate:
- 22.77%
- 8.72%
- 5.30%
- 6.45%
- 8.97%
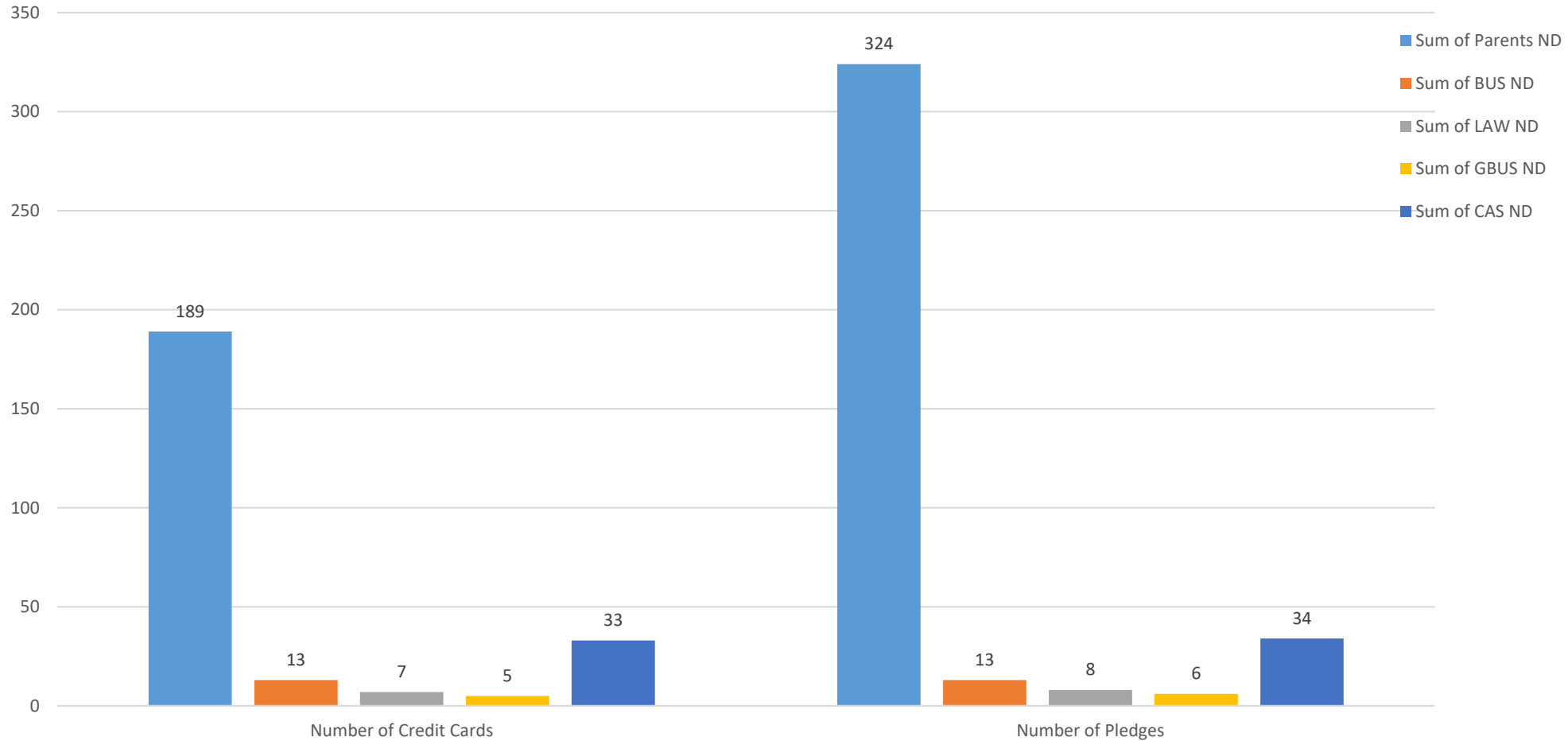
TOTAL AMOUNT PLEDGED – NONDONORS

GIFT DETAIL COMPARISON – NONDONORS

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GOAL: CHANGE LEARNING PORTFOLIO PLATFORM

The learning portfolio program at Loyola University Chicago seeks to connect the high-impact practice of learning portfolios (eportfolios) in the curriculum, in order to:

1) Enhance teaching and learning strategies for faculty,

2) Provide integrative learning experiences (signature experience) for students, and

3) Develop teaching and learning assessment opportunities at the course, program, and institutional level.
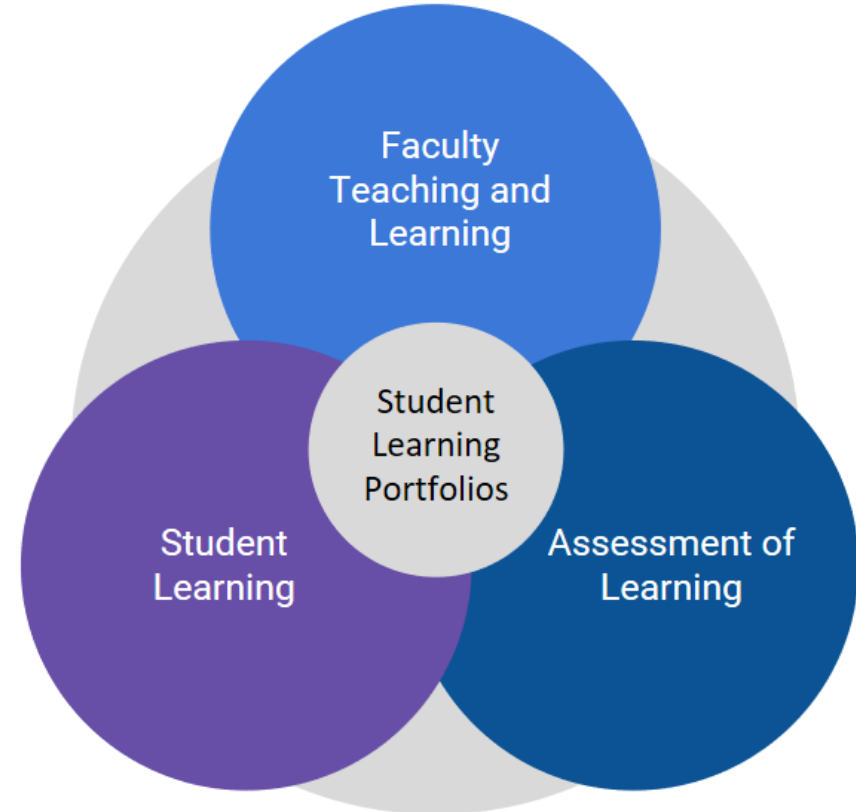
PROCESS: ANALYSIS

Learning Portfolio Platform Task Force
This task force includes multiple representatives from the Center for Experiential Learning, ITS, every college/school, the Libraries, Office of Institutional Effectiveness, Faculty Center for Ignatian Pedagogy, Student Academic Services, and Office of Online Learning.

-Met in January 2019-October 2019
-Collaborated on requirements and needs

Practices and Trends in the Industry:
-User friendly design elements
-Assessment and reporting features
-Collaboration and group environments
-Scaffolding learning templates

RFI AND RFP

-Researched top vendors in industry with help from ITS

-Gathered criteria from CEL and Task Force members

-RFI issued to 10 vendors, 4 selected

-RFP issued to 4 vendors, received 4 responses

-Top 2 invited to half-day presentations with stakeholders:
 -Task Force, students, faculty, staff

-2 demos and 2 follow-up Zoom meetings with additional questions

-Vendor selected: DIGI[cation]™

TASKSTREAM TO DIGICATION

This system would help facilitate best practices in teaching and learning, expand opportunities for:

-Student learning

-Innovate curriculum

-Track learning outcomes at course and program levels

-Assess standards

-Evidence of student learning and programs.

The solution, once implemented, will provide:

-Remove current technical difficulties and frustrations for students, staff, faculty, and admins

-Utilize assessment and tracking of student success and program data

-Measure student learning outcomes and provide innovative reports

-Funded from the Technology Fee budget

Loyola would benefit from a new learning portfolio platform by having a more accessible system, assessment and student learning data, share technology for multiple purposes, and significantly reduce the current cost of the platform system.

DIGICATION CLIENTS

- DePaul University
- AACU Values Institute
- SAIC
- Yale
- Duke
- Brown
- Cornell University
- Columbia University

- Arizona State University
- And over 1,200 colleges and universities

VENDOR SELECTION

- Digication has highest score and met more of our RFP needs.

- Campus Labs non-US server showed large concerns

- Task Force members unanimously selected **Digication** as preferred vendor

- Watermark (incumbent) was the clear last place

Vendor	Business	Technical	Service/Support	Vendor
Digication	1235	558	466	492
Pebblepad	1220	562	440	478
Campuslabs	1187	555	412	462
Watermark	1012	533	420	448

Digication (High Points)	PebblePad (Low Points)
Integrated design elements	Rely on embed codes
Customer service	Primary email support on UK time
Direct PeopleSoft Integration	Migration through data island
Robust Assessment upgrade in 2020	
LTI Integration	

SIDE BY SIDE COMPARISON

Digication	Pebblepad
STRENGTHS • LTI and PeopleSoft Integration • Auto-compression Design elements • Template Features • Collaboration spaces in the assessment portal • Popular among Industry Users • Future Assessment Features very robust **CAUTIONS** • New Features Summer 2020	**STRENGTHS** • Templates and Workbook Features • Pedagogy for Teaching and Learning • ATLAS Assessment Spaces • Collaboration spaces in assessment portal **CAUTIONS** • Some outdated Technology tools • Customer Support minimal/mostly email through developers in UK • Embed codes in design element limited

Summary - 3 year Costs

	Digication	PebblePad	
Cloud Services	$223,425	$272,364	
Implementation Services	$0	$6,250	
Sub-Total	$223,425	$278,614	
Grand Total	$223,425	$278,614	
Tech Fee Cost (3 Yr)	$0	$0	

Year to Year Comparison

Yearly Amounts	Year 1 Total	Year 2 Total	Year 3 Total
Digication	$57,375	$76,800	$89,250
PebblePad	$69,775	$95,450	$113,389
Cumulative Amounts	Year 1 Total	Year 2 Total	Year 3 Total
Digication	$57,375	$134,175	$223,425
PebblePad	$69,775	$165,225	$278,614

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COMMUNICATION TIMELINE

Month	Action Item
December 2019	10th- ATC Presentation 12th- ITESC Presentation -Plan migration: data, rubrics, standards -Schedule and prepare info sessions for Spring -Contract negotiation and signing
January 2020	-Reach out to faculty and staff with messaging about shift from Taskstream to Digication -Email time and meetings for info sessions/presentations -Develop messaging for university constituents: Council of Deans, Department Chairs, etc.
February 2020	-Host info Session #1 -Monthly email reminder and invitation to info sessions on data switch
March 2020	-Host info Session #2 -Monthly email reminder and invitation to info sessions on data switch
April 2020	-Host info Session #3 -Monthly email reminder and invitation to info sessions on data switch
May 2020	-Host info Session #4 -Monthly email reminder and invitation to info sessions on data switch
June 2020	-Host info Session #5 -Transfer of rubrics and standards into the system -Monthly email reminder and invitation to info sessions on data switch
July 2020	Access to updated system Develop new materials for website, staff, and faculty
August 2020	2020 Launch Continued presentation and trainings for students, staff, and faculty Engaged Learning Assessment Launch

INSTITUTIONAL VALUE

- Save near $150,000+ in our first years by moving to Digication

- Added features for collaborative assessment, reporting, program evaluation

- Improve and innovate student learning and curriculum

- Excellent design and ease of use for adoption

BENEFITS TO LOYOLA UNIVERSITY CHICAGO

Loyola will benefit from Digication:

- Meets technical requirements

- Improve administrative portfolio support

- Reduce costs

- Grow use of portfolios

- Integrates with Sakai

- Innovate Student learning

- Enhance Faculty Teaching and Learning Tools through Academic Technology

- Increase assessment of learning opportunities

- Increase opportunities to engage with external reviewers (site supervisors and community partners)

REQUEST

- Seeking ITESC approval
- Senior Leadership's support of the implementation across the university departments and programs
  - CEL
  - Academic Areas
  - Provost and ITS

NEXT STEPS

- Contract negotiations – begin December 2019
- Implementation- data upload and pre-creation Summer 2020- Fall 2020 launch

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LOCUS Campus Solutions
9.2 Fluid Enhancements

December 12th, 2019

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Goals and Objectives

- Design and implement Fluid navigation using homepages, tiles, and navigation collections.

- Eliminate the iHub Portal from the current set of PeopleSoft applications supported.

- Improve the student, faculty, advisor and staff experience by leveraging new tools including Fluid pages, improved navigation, and a new look and feel.

- Become current on supported functionality/technology to ensure maximization of the PeopleSoft Campus Solutions suite.

- Re-brand the Fluid Delivered Stylesheets to match Loyola Branding expectations (similar to what was done when the PORTAL was deployed).

- Improve the PeopleSoft technology knowledge, throughout the ITS development team, regarding new technology such as Fluid.

Project Approach

Two phase approach involving a stepped go live

- Phase I – Fluid Navigation for staff go live in March 2020
  - Already under way with functional users and ITS teams.
  - No Impact to students or faculty.
- Phase II – Fluid Customizations and Delivered functionality go live in July 2020.
- Decommision of Portal(iHub).
- Fluid Dev and Fluid Self-Service Functionality.
- Formed a fluid steering committee with representatives from various units of the university to govern the project.
- Committed resources including functional representatives from each core LOCUS business area, ITS representatives from Development and Middleware, the fluid steering committee, and one consulting resource.

Project Timeline

Current Portal

LOCUS

| LOCUS Home | Loyola Home | Add to My Links | Sign out |

My Page   Guest   News   Online Forms & Help   Social Gadgets

My Links

Personalize :   My Content   My Layout

Enterprise Menu
- ▷ My Favorites
- ▷ IntraSee
- ▷ Student Advisement
- ▷ Student Admissions
- ▷ Personal Portfolio
- ▷ Residence Life
- ▷ Academics
- ▷ Advising
- ▷ Campus Finances
- ▷ Manage Student Records
- ▷ Search for Classes
- ▷ Build Community
- ▷ Academic Records
- ▷ Student Business Office
- ▷ Campus Community
- ▷ Records and Enrollment
- ▷ Curriculum Management
- ▷ Course and Class Viewing
- ▷ My Content
- ▷ Content Management
- ▷ Portal Administration
- ▷ Worklist
- ▷ Application Diagnostics
- ▷ Tree Manager
- ▷ Reporting Tools
- ▷ PeopleTools
- ▷ Admin & Security
- – Campus Solutions 9.2 TRN
- – DemoSite Home
- – Take a Survey
- – Browse Workspaces
- – My Account Sign On
- – My Instant Messaging
- – Usage Monitoring
- – Change My Password
- – My Personalizations
- – My System Profile
- – My Dictionary
- – My Feeds

Student Center
Student Center
A comprehensive summary of information

Faculty Quick Look
Teaching Schedule for :

No Teaching Schedule found

Scheduling and Class Links
📁 **Scheduling a Class Section**
- 📄 Maintain Schedule of Classes
- 📄 Schedule New Course
- 📄 Schedule Class Meetings
- 📄 Adjust Class Associations
- 📄 Update Sections of a Class

📁 **Course and Class Viewing**
- 📄 Class Search
- 📄 Course Catalog
- 📄 Class Roster
- 📄 Instructor Schedule
- 📄 Print Class Schedule

Administrative Center
Administrative Center
The place to start working with student records.

Faculty Center

Faculty Activity System (FAS)
Faculty Activity System
Sign into the Faculty Activity System

MyList

MyList
Your Course Equivalency Look-up Appli

MyList Course Equivalency Look-up Application

MyList allows prospective students to look up
equivalencies from over 1,400 institutions of
Additional institutions and course equivalencies a
a daily basis.

MyList also provides a the capacity to print the
future reference. Further this program will allow
feeder schools to assist prospective students in
which have known equivalents at Loyola University

Academic Requirements Outlines

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Current Navigation

What is Fluid Nav?(continued)

Fluid Phase II

- Fluid Mobile Responsive Student, Faculty, and Advisor Interface.

- Support for ipads, iphones, androids, and tablets.

- Key LOCUS features such as iPlan and Change My Major will be enriched for small form factor devices.

9.2 Mobile Device View
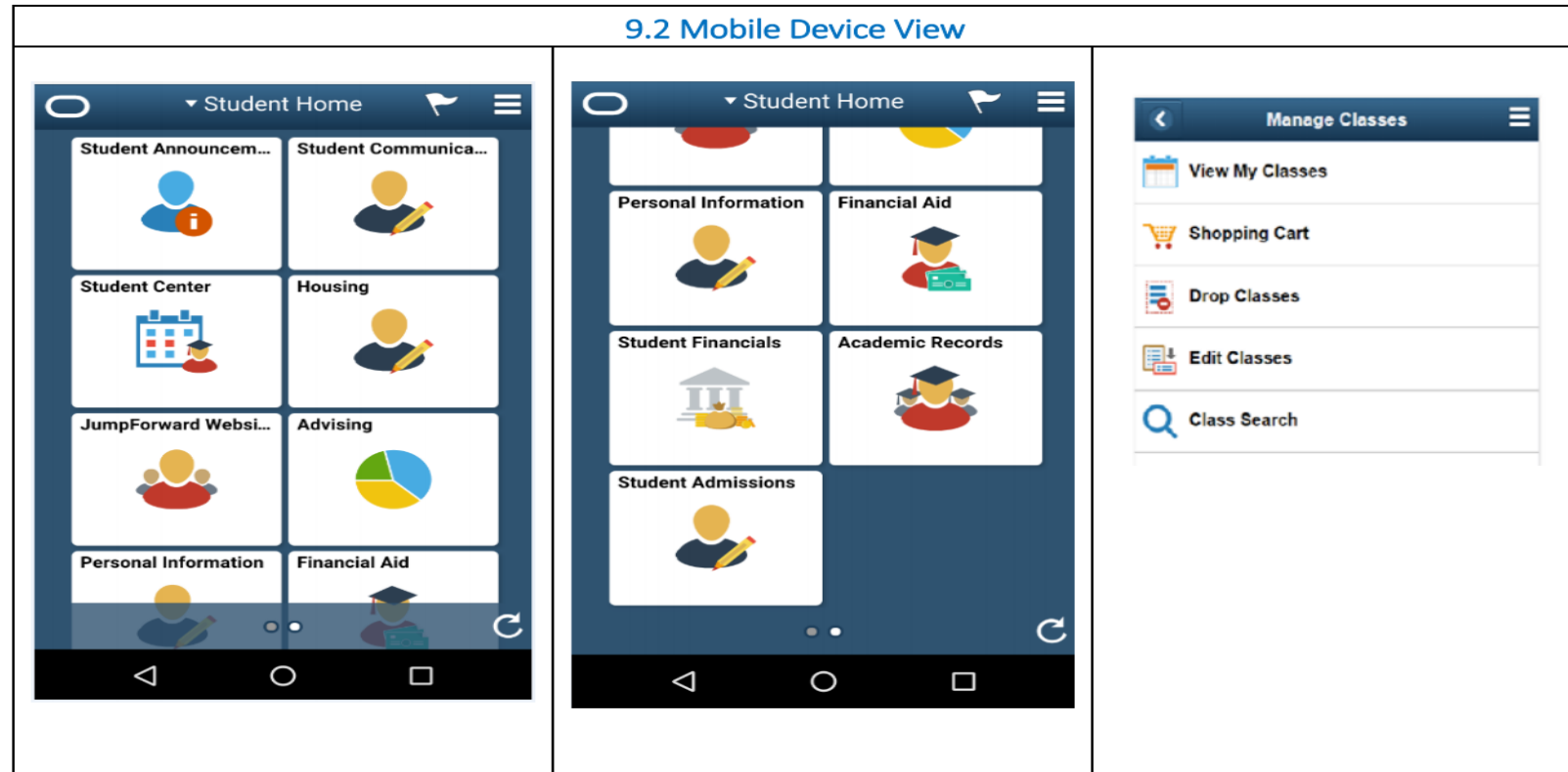
Next Steps

- End user testing for phase I already underway.
- Lunch and learns for all staff to attend in early spring.
- Initial Phase I Go-Live changes first week of March.
- Additional end user testing prior to Phase II Go-Live in July.
- Focus groups for faculty and students (to be scheduled).
- Secondary Phase II Go-Live in mid July
- A new mobile experience(to be determined).

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Plan of Record Tracking

POR Activity	Total Count	T-Shirt Sizing Breakdown				
		X-Large	Large	Medium	Small	X-Small
Original FY20 Q1-Q2 POR	201	22	34	97	45	3
Revised FY20 Q1-Q2 POR	201	23	35	97	43	3
New Projects Started	61	5	11	24	19	2
Final FY20 Q1-Q2 POR	262	28	46	121	62	5
Completed Projects	(60)	4	8	23	23	2
Forecasted Completed Projects	(17)	4	3	7	2	1
Duplicate / Canceled	(12)	1	0	8	3	0
Rollover Projects	173	19	35	83	34	2
New Projects not Started	11	0	1	3	7	0
FY20 Q3-Q4 POR (Draft)	184	19	36	86	41	2
Net Change	(17)	(3)	2	(11)	(4)	(1)

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Project Sizing Trend

Portfolio Counts											
T-Shirt Sizing	Work Effort	FY16 Q1-Q2	FY16 Q3-Q4	FY17 Q1-Q2	FY17 Q3-Q4	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	FY20 Q3-Q4
TBD	TBD	0	0	0	0	0	0	0	0	0	0
X-Small	< 5 Days	8	6	4	4	2	1	1	4	3	2
Small	5-30 Days	55	45	49	48	36	31	40	50	45	41
Medium	31-60 Days	85	80	94	98	96	92	94	96	97	86
Large	61-120 Days	41	37	36	37	34	36	31	35	34	36
X-Large	>120 Days	20	15	17	20	15	15	11	18	22	19
	Portfolio	209	183	200	207	183	175	177	203	201	184
	Completed	64	48	57	54	44	58	55	49	77	

ITS Project Portfolio
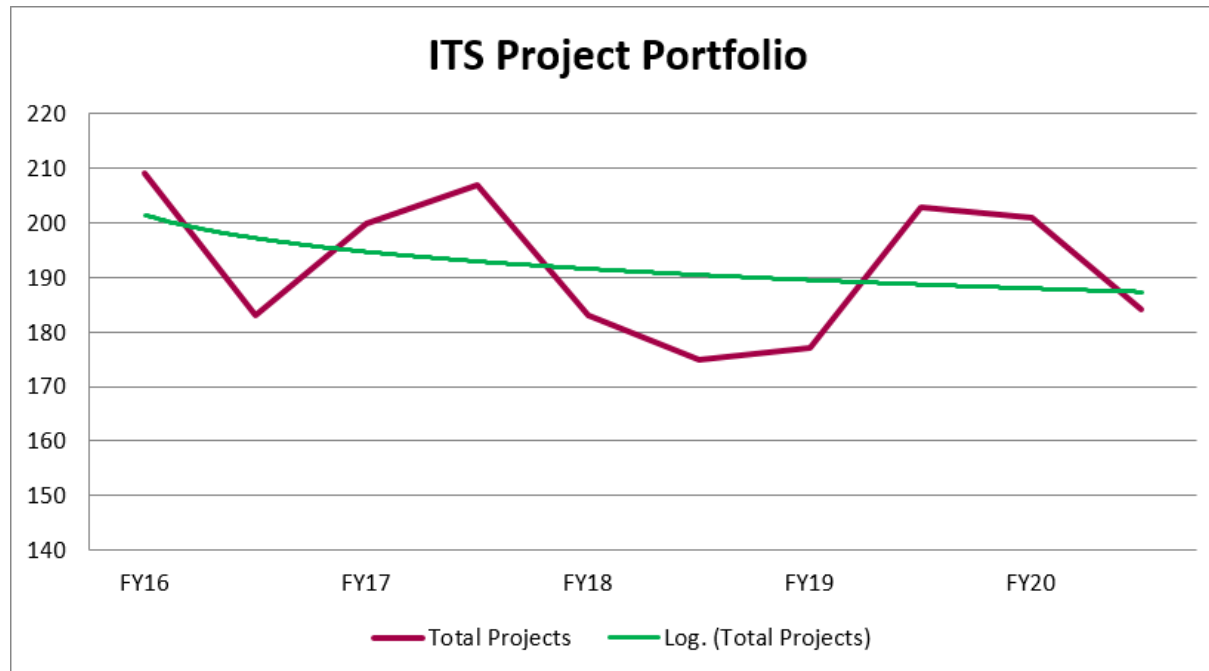
	Avg.	Min	Max	This Period
Portfolio	192	175	209	184

41

Completed Project Forecast

Portfolio Completion Pct
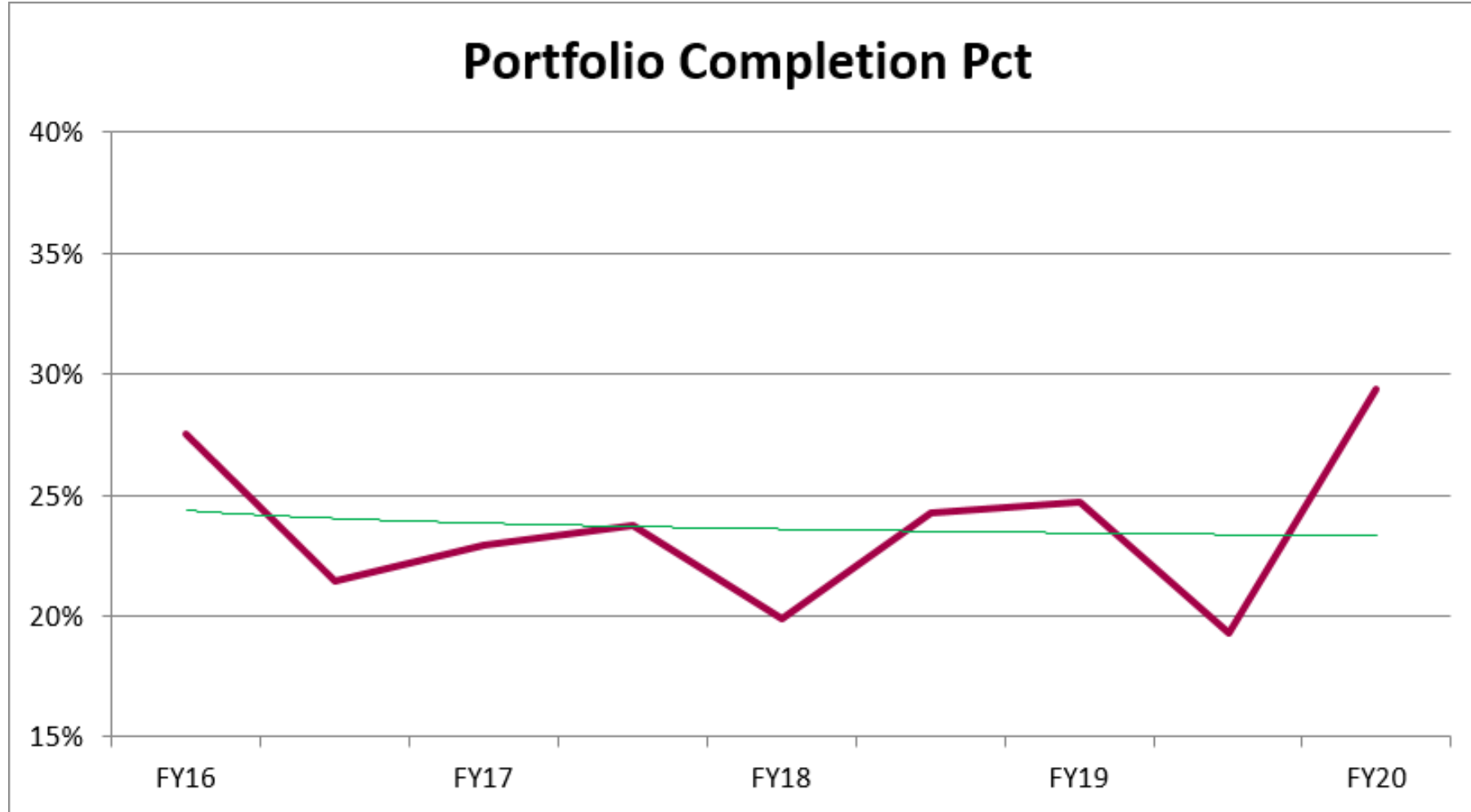
77 projects forecast completed this period

Capacity Estimates

T-Shirt Sizing	Work Effort	Initial Project Count*	Project Effort** (FTE)
TBD	TBD	0	0.0
X-Small	< 5 Days	2	0.0
Small	5-30 Days	41	3.7
Medium	31-60 Days	86	16.5
Large	61-120 Days	36	13.8
X-Large	>120 Days	19	21.1
	Total	184	55.2

* snapshot as of 12/09/20

** most likely scenario

ITS Capacity/Resource Calculations (FTE)	
Full Time	102.0
Part Time	1.3
Annual Total	103.3

	Est. Effort Allocation	Est. Time Allocation	Most Likely Estimate Gap
Admin.	26.4	26%	42%
Support	44.7	43%	
Project	32.1	31%	
Total	103.3	100%	

1 FTE increase *Director of Integration & Application Services*

Resulted in a **.5 FTE or .5% increase** *in project capacity*

FY20 Q3-Q4 Estimated Resource Gap

Max Estimate: Capacity 32.1, Needs 75.1
Most Likely Estimate: Capacity 32.1, Needs 55.2 (~42%)
Median Estimate: Capacity 32.1, Needs 53.1
Min Estimate: Capacity 32.1, Needs 31.2

■ Capacity ■ Needs
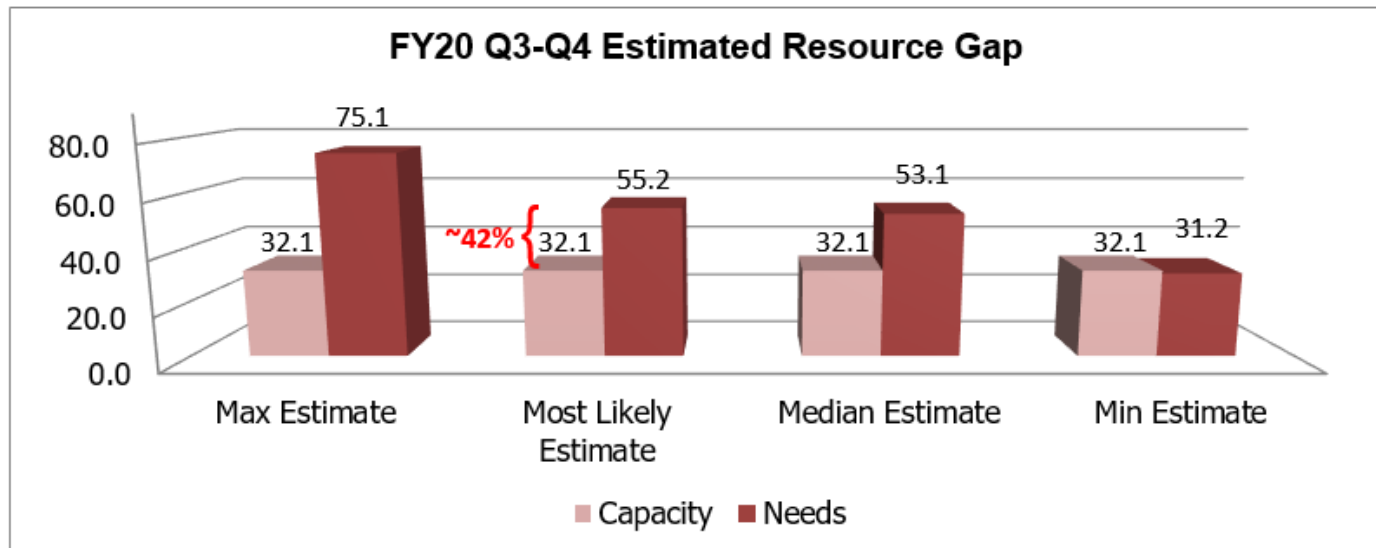
Portfolio Growth Details

	FY16 Q1-Q2	FY16 Q3-Q4	FY17 Q1-Q2	FY17 Q3-Q4	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	FY20 Q3-Q4	5 Year Avg
Portfolio Count	209	183	200	207	183	175	177	203	201	184	192
Portfolio Growth	4%	-12%	9%	4%	-12%	-4%	1%	15%	-1%	-8%	
Most Likely Work Effort	59.4	47.9	55.3	59.7	51.5	51.0	45.8	56.5	60.3	55.2	54.3
Most Likely Work Effort Growth	7%	-24%	13%	7%	-16%	-1%	-11%	19%	6%	-9%	
ITS Project Capacity	38.7	38.7	32.2	31.5	31.5	31.5	31.0	30.4	31.7	32.1	32.9
ITS Project Capacity Growth	0%	0%	-20%	-2%	0%	0%	-2%	-2%	4%	1%	
Estimated Resource Gap	35%	19%	42%	47%	39%	38%	32%	46%	47%	42%	39%
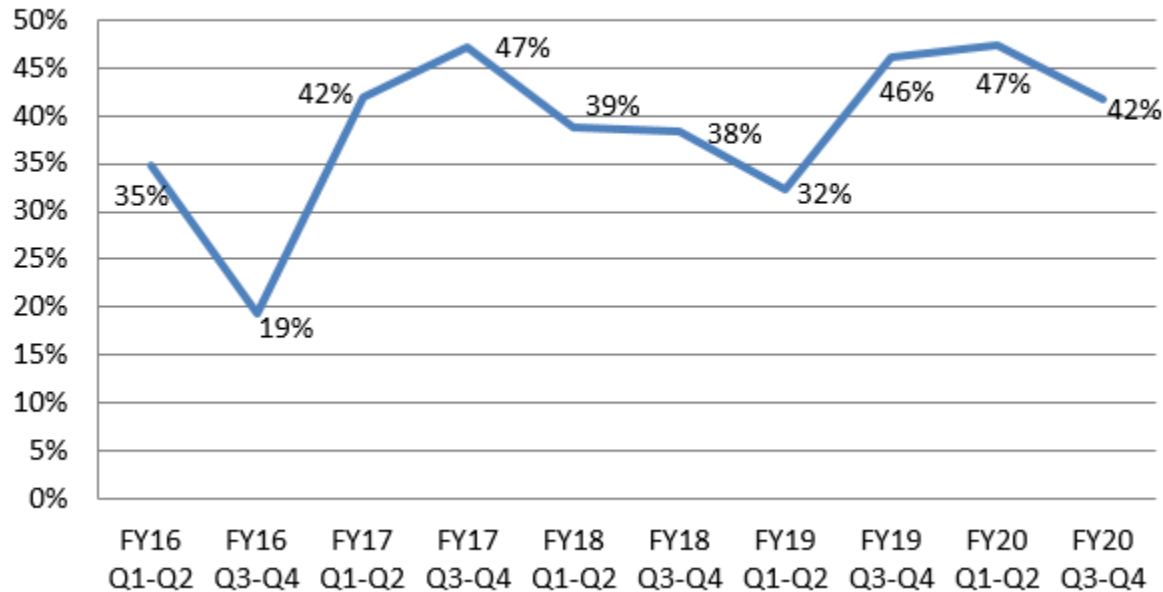
ITS Project Portfolio Resource Gap

ITS Project Portfolio Resource Gap

— Most Likely Work Effort — ITS Project Capacity
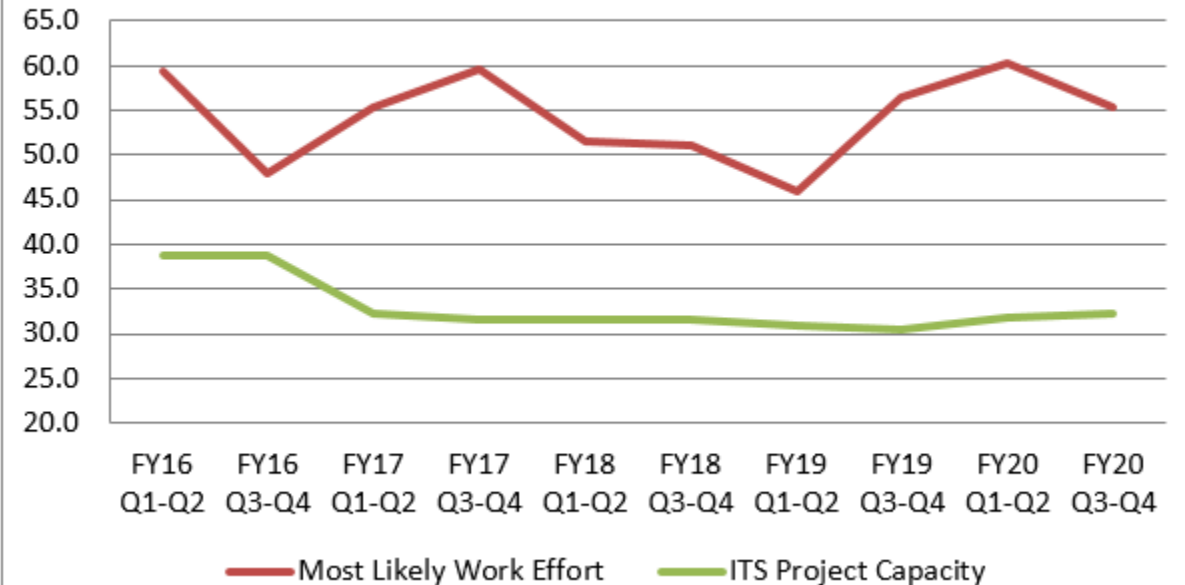
ITS Project Portfolio Impact

Portfolio Strategic Breakdown - History

	Run	Grow	Transform
FY13 Q1-Q4	71%	18%	11%
FY18 Q3-Q4	74%	18%	8%
FY19 Q1-Q2	76%	17%	7%
FY19 Q3-Q4	76%	16%	8%
FY20 Q1-Q2	77%	15%	8%
FY20 Q3-Q4	76%	16%	8%
Best Practice 2019 - HE	80%	14%	6%
Best Practice 2018 - HE	76%	18%	6%
Best Practice 2017 - HE	75%	17%	8%
Best Practice 2016 - HE	73%	16%	11%
Best Practice 2015 - HE	77%	13%	10%
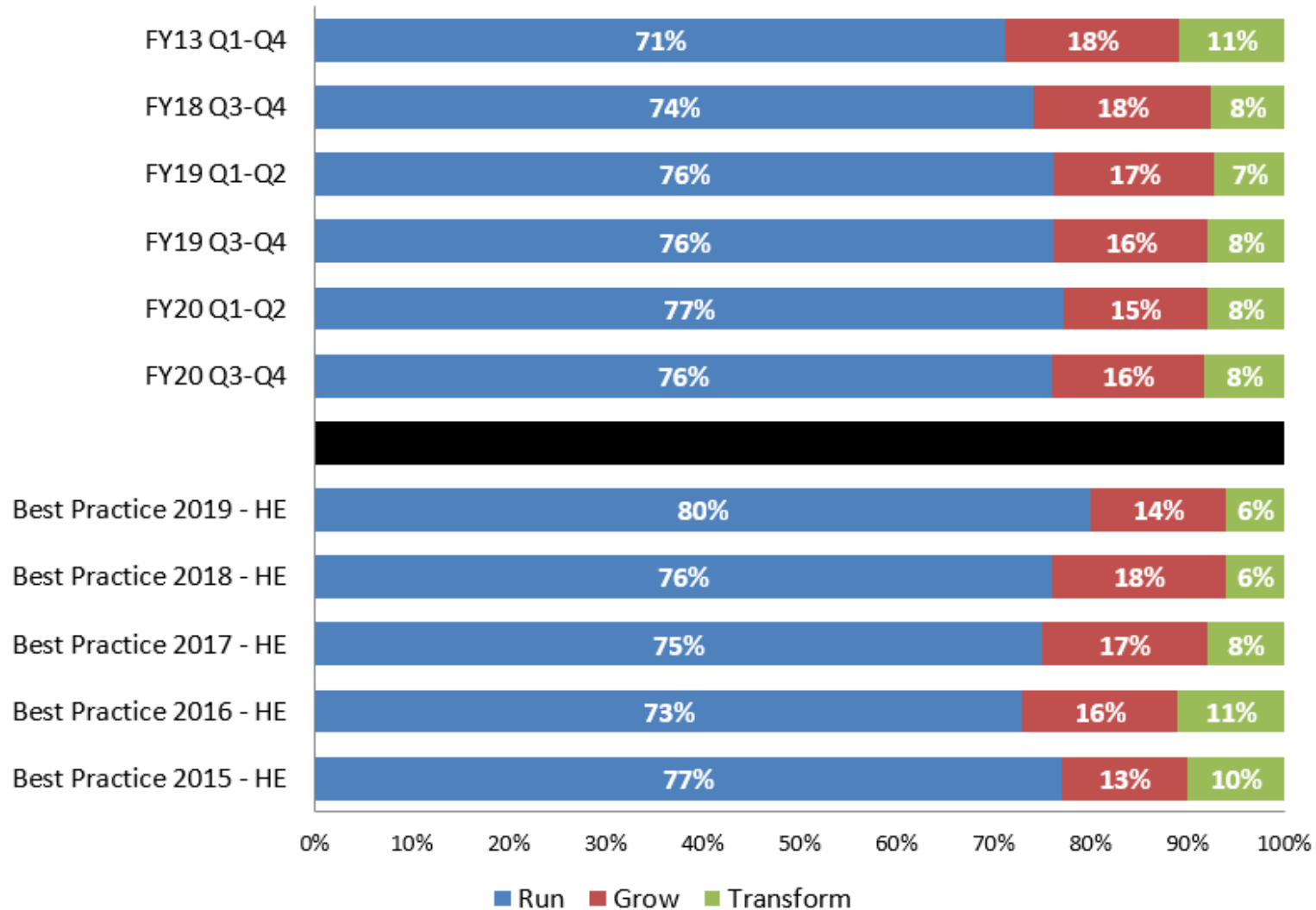
Run – Ongoing operations

Grow – Information systems and services to optimize performance

Transform – New technologies and processes that fundamentally promote change

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FY20 Q3-Q4 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	1-5	**LOCUS Enhancements (6)**	**XLarge**	**Active**	**Q2 FY20**	**Enterprise/Multiple**
A	1	Rollout of WHAT-IF Report for Students, Faculty, and Advisors	Medium	Active	Q1 FY20	Academic Advising and Services
A	2	Rollout of Advising Notes Feature in LOCUS	Medium	Active	Q1 FY20	Academic Advising and Services
A	3	Advisor Assignment - re-design of batch process	Large	Active	Q1 FY20	Academic Advising and Services
A	4	Law School Admissions - package financial aid earlier in admission cycle	Medium	Pending	Q1 FY20	School of Law:Admis & Fin Aid
A	5	Financial Aid Award Letter Processes - Aid Year 2021	Small	Active	Q1 FY20	Financial Assistance
	6-13	**Information Security Program (8)**	**Large**	**Active**	**TBD**	**Enterprise/Multiple**
A	6	2015 Security Assessment	Medium	In Progress	Q4 FY21	Information Technology Services
A	7	High Security Lab Environment/Security Operations Center	Medium	New	TBD	Information Technology Services
A	8	Broaden Use of SIEM Technologies	Large	In Progress	Q4 FY20	Information Technology Services
A	9	Security - Securing How-To Instructions Across the University	Medium	In Progress	Q3 FY20	Information Technology Services
A	10	2019 Security Assessment	Medium	In Progress	Q4 FY20	Information Technology Services
A	11	2020 Security Assessment	Medium	Pending	Q4 FY21	Information Technology Services
A	12	Data Center Firewalls	Large	Pending	Q4 FY21	Information Technology Services
A	13	Full Security Review of Student Clinical Placement On-boarding Processes	Medium	New	Q4 FY21	School of Nursing
	14-20	**IT Disaster Recovery (7)**	**Large**	**Active**	**Q4 FY20**	**Enterprise/Multiple**
A	14	Disaster Recovery Planning	Large	In Progress	Q4 FY20	Information Technology Services
A	15	Network Disaster Recovery / Redundant ATT Circuit	Medium	In Progress	Q3 FY20	Information Technology Services
A	16	Disaster Recovery - Slate	Medium	In Progress	Q3 FY20	Information Technology Services
A	17	Disaster Recovery - TouchNet Paypath/TPG	Small	In Progress	Q4 FY20	Information Technology Services
A	18	Business Continuity for Departmental Staff	XLarge	In Progress	Q4 FY20	Information Technology Services
A	19	Network Services (Core) Disaster Recovery Plan	Medium	In Progress	Q3 FY20	Information Technology Services
A	20	2020 Disaster Recovery Program Plan Reviews and Testing	Medium	New	Q3 FY20	Information Technology Services

FY20 Q3-Q4 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	Rank	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	21-26	**Enterprise Content Management (6)**		**Large**	**Active**	**TBD**	**Enterprise/Multiple**
A	21	ECM - Electronic Document Retention		Large	On Hold	TBD	Information Technology Services
A	22	Accounts Payable to Treasury/Cash Management - Foreign Invoices		Small	Pending	TBD	Accounts Payable
A	23	HSC - Faculty Admin		Medium	New	Q3 FY20	Faculty Administration
A	24	DocFinity webforms/automated workflows that perform transactions in LOCUS		Large	New	TBD	Registration & Records
A	25	DocFinity intelligent capture product		Large	New	TBD	Registration & Records
A	26	Exception/Error Report for transcripts not entering workflow		Large	New	TBD	Registration & Records
	27-38	**Business Intelligence/Data Warehouse Program (12)**	**Rank**	**XLarge**	**Active**	**TBD**	**Enterprise/Multiple**
A	27	BI for Student Finance	1	XLarge	In Progress	Q3 FY20	Finance-Office of VP-CFO
A	28	Develop an HR BI Dashboard, starting with key reports and metrics	2	XLarge	In Progress	Q3 FY20	Human Resources: Office of VP
A	29	Revenue to Expense Model - Version 4	3	XLarge	In Progress	Q4 FY21	Finance-Office of VP-CFO
A	30	Learning Analytics - Phase 2	4	Large	In Progress	Q3 FY20	Enterprise/Multiple
A	31	Revenue to Expense Model - Version 3	5	XLarge	In Progress	Q4 FY20	Student Development - Office of VP
A	32	ILDS Submission of Student Data	6	Large	In Progress	Q3 FY20	Human Resources
A	33	Student Profile - Power BI	7	Large	In Progress	Q4 FY20	Institutional Research
A	34	Financial Aid Suite of Power BI Dashboards	8	XLarge	In Progress	TBD	Information Technology Services
A	35	Academic Requirements Report (ARR) Data into the EDW	9	XLarge	In Progress	Q4 FY20	Student Advising & Support
B	36	ITS Annual Summary Dashboard	10	Large	On Hold	Q4 FY20	Information Technology Services
B	37	ITS Dashboard - Area Metrics	11	Medium	On Hold	Q4 FY20	Finance-Office of VP-CFO
A	38	BI Projects	--	XLarge	In Progress	Q4 FY20	Enterprise/Multiple
	39-43	**Lawson/Kronos Enhancements (5)**		**XLarge**	**Active**	**TBD**	**Enterprise/Multiple**
A	39	Lawson Self Service Outside the Firewall		Medium	Pending	TBD	Financial Systems
A	40	ESS Life Events - Benefits		Small	On Hold	Q3 FY20	Human Resources
A	41	ESS Federal Tax Change		Small	Pending	TBD	Human Resources
A	42	PNC Paid Check File and Paid Check File Images Open Check Data Processing		Small	In Progress	Q3 FY20	Financial Systems
A	43	Updates for 2020 HR Open Enrollment in Lawson		Large	In Progress	Q3 FY20	Human Resources

FY20 Q3-Q4 ITS Project Prioritization Worksheet

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Tab	Row Nbr	Program Group	Proposed Ranking	Prior ITESC Ranking	PRB Ranking	ATC Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Pre-Approved	1-5	LOCUS Enhancements (6)	Pre-Approved	Pre-Approved	Pre-Approved	Pre-Approved	Large	Active	TBD	Enterprise/Multiple
Pre-Approved	6-13	Information Security Program (8)	Pre-Approved	Pre-Approved	Pre-Approved	Pre-Approved	Large	Active	TBD	Information Services
Pre-Approved	14-20	BCDR/Failover (7)	Pre-Approved	Pre-Approved	Pre-Approved	Pre-Approved	XLarge	Active	Q2 FY21	Enterprise/Multiple
Pre-Approved	21-26	Enterprise Content Management (6)	Pre-Approved	Pre-Approved	Pre-Approved	Pre-Approved	Large	Active	TBD	Enterprise/Multiple
Pre-Approved	27-38	Business Intelligence/Data Warehouse (10)	Pre-Approved	Pre-Approved	Pre-Approved	Pre-Approved	XLarge	Active	TBD	Information Services
Pre-Approved	39-43	Lawson/Kronos (5)	Pre-Approved	Pre-Approved	Pre-Approved	Pre-Approved	Large	Active	TBD	Enterprise/Multiple
		LDE Foundation: Collaboration and Security (8)					**XLarge**	**Active**	**Q2 FY21**	**Information Technology Services**
Priority A	44	LDE Delivery Program					XLarge	Active	Q2 FY21	Information Technology Services
Priority A	45	Azure Information Protection & Data Loss Prevention POC Project					XLarge	Active	Q4 FY20	Information Technology Services
Priority A	46	Enterprise Mobility Management	**1**	1	1	---	Medium	Active	Q4 FY20	Information Technology Services
Priority A	47	2 Factor Authentication					Medium	Active	Q2 FY20	Information Technology Services
Priority A	48	Azure Password Self-Service					Large	New	TBD	Information Technology Services
Priority A	49	Azure Privileged Identity Management					Medium	New	TBD	Information Technology Services
Priority A	50	Exchange Online Protection & Advanced Threat Protection					Large	New	TBD	Information Technology Services
Priority A	51	O365 Application Portal (Single Sign-On)					XLarge	New	TBD	Information Technology Services
Priority A	52	Planning and Implementation of EAB-Navigate	**2**	6	2(tie)	---	XLarge	Active	Q1 FY21	Academic Advising and Services
Priority A	53	Space and Asset Management - Phase 1 Implementation	**3**	5	2(tie)	---	Xlarge	Active	Q4 FY21	Facilities-Office of VP
Priority A	54	Course Evaluation Replacement	**4**	4	4 (tie)	---	XLarge	New	Q3 FY20	Institutional Research
Priority A	55	LOCUS Fluid Page Rollouts	**5**	7	4(tie)	---	Xlarge	Active	Q3 FY20	Registration & Records
Priority A		**Learning Portfolio Program**					**Large**	**Active**	**TBD**	**Center for Experiential Learning**
Priority A	56	Learning Portfolio Review	**6**	12	6	1	Large	Active	Q3 FY20	Center for Experiential Learning
Priority A	57	Learning Portfolio - Digication Implementation					Large	New	TBD	Center for Experiential Learning

FY20 Q3-Q4 ITS Project Prioritization Worksheet

Tab	Row Nbr	Program Group	Proposed Ranking	Prior ITESC Ranking	PRB Ranking	ATC Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Priority A	58	Interface (2 Way) for Verification via Inceptia	7	14	7	---	Medium	Active	Q3 FY20	Financial Assistance
Priority A	59	Replacement of ECSI SALNet	8	13	8	---	Large	Active	Q1 FY21	Office of The Bursar
Priority A	60	Switching eTranscript vendor to Parchment	9	---	9	---	Large	New	TBD	Registration & Records
Priority A		**Advancement/Development**					**Large**	**Active**	TBD	**Advancement/Development**
Priority A	61	Gift Agreement Workflow					Medium	Active	Q3 FY20	Advancement/Development
Priority A	62	Student Status Updates for Advancement	10	---	10	---	Medium	Active	Q3 FY20	Advancement/Development
Priority A	63	Recreate the Bio Data Feed from iModules to Advance					Medium	New	TBD	Advancement/Development
Priority A	64	Replace System for Gift Receipting Process					Medium	New	TBD	Advancement/Development
Priority A	65	Student Health Insurance Waiver Rewrite	11	---	11	---	Medium	Active	TBD	Office of The Bursar
Priority A	66	Enterprise Learning Hub	12	---	17	---	Large	Active	Q3 FY20	Enterprise/Multiple
Priority A	67	Travel & Expense Management Technology Solution	13	23	12		Large	Active	TBD	Controller
Priority A	68	Student Mentoring Software Pilot-PeopleGrove	14	25	14	---	Medium	Active	Q3 FY20	Quinlan School of Business
Priority A	69	(OIP) Administrative Software RFP and Implementation	15	26	16	---	Large	Active	Q3 FY20	Office of International Programs
Priority A	70	CVENT Registration for the Climate Change Conference 2020	16	27	19	---	Medium	New	TBD	Institute of Environmental Sustainability
Priority A	71	Automate HSC Parking/ID Processes for LUC students	17	---	---	---	Medium	Active	TBD	School of Nursing
Priority A	72	CVENT Registration for Commencement 2020	18	---	13	---	Medium	Active	Q3 FY20	Special Events
Priority A	73	T4 Sitemanager Upgrade	19	---	15	---	Medium	Active	Q3 FY20	Information Technology Services
Priority A	74	WebCheckout Ipgrade to v7	20	---	18	---	Small	Active	Q3 FY20	Information Technology Services

Agenda

Data Loader-Parent Load, Student Load
- M. Halverson, M. Karwacki

Learning Portfolio Platform
- P. Green, B. Tate

Fluid Demo
- R. Vazquez, L. Adams

Project Portfolio Prioritization
- S. Malisch, J. Sibenaller

ITESC Membership
- S. Malisch

Campus Partner Meetings
- S. Malisch

Information Technology Executive Steering Committee

Chair – Susan Malisch

Area	Member
Administrative Services	Tom Kelly
Advancement	Karen Paciero
Enrollment Management and Student Success	Paul Roberts
Facilities	Kana Henning
Finance	Wayne Magdziarz Teresa Krafcisin
Acting Provost	Margaret Callahan
Provost Office Representatives	David Slavsky
Human Resources	Winifred Williams Danielle Hanson
ITS	Jim Sibenaller
Student Development	Jane Neufeld
University Marketing and Communications	Jeremy Langford

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Campus Partner Meetings

2019 ITESC Schedule

February 27, 2019 - Tuesday, 1:00-3:00 PM
- Integrated Workplace Management System
- Loyola Digital Experience/Email in the Cloud Pilot Results
- Key Upcoming Technology Changes

April 30, 2019 - Tuesday, 1:00-3:00 PM
- Space & Asset Management System - Archibus
- Academic Technology Committee
- Information Security Advisory Council
- Architecture Review Board/Loyola Digital Experience
- ITS Project Portfolio Preparation

June 20, 2019 - Thursday, 1:00-3:00 PM
- Project Portfolio Prioritization

August 21, 2019 – Wednesday, Email Briefing
- FY20 Q1-Q2 Portfolio Prioritization Results
- Technology Support for Faculty Teaching This Fall
- Major Initiatives Contract Summary Status
- Additional Highlights

October 1, 2019 - Tuesday, 1:00-3:00 PM
- ITS Prioritized Projects Review
- Loyola Digital Experience Foundation: Collaboration & Security
- Information Security Improvements
- Data Backups
- HSC Applications

December 12, 2019 - Thursday, 1:00-3:00 PM
- Data Loader-Parent Load, Student Load
- Fluid Demo
- Project Portfolio Prioritization
- ITESC Membership
- Campus Partner Meetings

2019 ITESC Schedule

March 3rd, 2020 - Tuesday, 1:00-3:00 PM

April 28, 2020 - Tuesday, 1:00-3:00 PM

June 18, 2020 - Thursday, 1:00-3:00 PM
- Project Portfolio Prioritization

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

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

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