ITS Executive Steering Committee (ITESC)

Agenda and Materials – March 29, 2016

Agenda

Space Management Needs Analysis
- K. Henning

Phone System Replacement
- D. Vonder Heide

Information Security Update
- J. Pardonek, J. Sibenaller

Disaster Recovery Update
- D. Vonder Heide, J. Sibenaller

LUHS Workday Migration-LUC Process Analysis
- J. Sibenaller

anywhere anytime
accessLUC

NEEDS ANALYSIS PROCESS

- Hired BRG Workplace Management Consultants to conduct a needs analysis and determine if Loyola has an enterprise-wide need for a space management technology solution
- 3 days of interviews:
  - Facilities
  - Provost's Office
  - Student Development (Campus Reservations, Residence Life)
  - Finance (including HSD)
  - ITS
- Visioning session, goals and objectives
- Final report and recommendations

UNIVERSITY SPACE STATISTICS

- 3 Chicagoland campuses
- 5,110,000 square feet of buildings
- 66 buildings
- 95 acres

VISION STATEMENT

Loyola University Chicago Facilities Department envisions implementing a **best-practice, single source,** space management system.

The proposed solution will allow for better management of space in **real time**. The solution will support automation of related processes, integrations with supporting Loyola data systems, and robust analytical and reporting functionality.

The solution, once implemented, will provide a single source for space and occupancy data which will result in:

- **accuracy & consistency** of data across multiple systems and reports
- confidence in data reported to **Federal and State** authorities
- maximized **indirect cost recovery**
- development and **repeatability** of metrics, and
- greater space **utilization.**

Full implementation will ultimately result in faster and more universal access to aligned data to support informed decision making, especially related to space utilization, and therefore increase the ability to drive space-related decision making throughout the entire organization.

UNIVERSITY NEEDS

NEED: Ability to generate basic space management queries	ISSUE: Cannot easily query space management data
NEED: Easily produce Federal reports on research space	ISSUE: Very manual and lengthy process of compiling data from multiple sources
NEED: Ability to be more strategic with decisions regarding space	ISSUE: Decisions are reactive due to a lack of visibility of all space centrally

|	
NEED: Ability to easily access, view and query drawings	ISSUE: Multiple formats and locations with inconsistent layering, naming conventions
NEED: Seamlessly share space information with other systems/departments	ISSUE: Space is tracked in Excel spreadsheets making manual data sharing necessary
NEED: Ability to identify space for future growth, grants, faculty and staff	ISSUE: No central data repository to easily identify and allocate space consistently

CURRENT STATE ANALYSIS

LOYOLA CURRENT STATE TECHNOLOGY MAP
JANUARY 2016
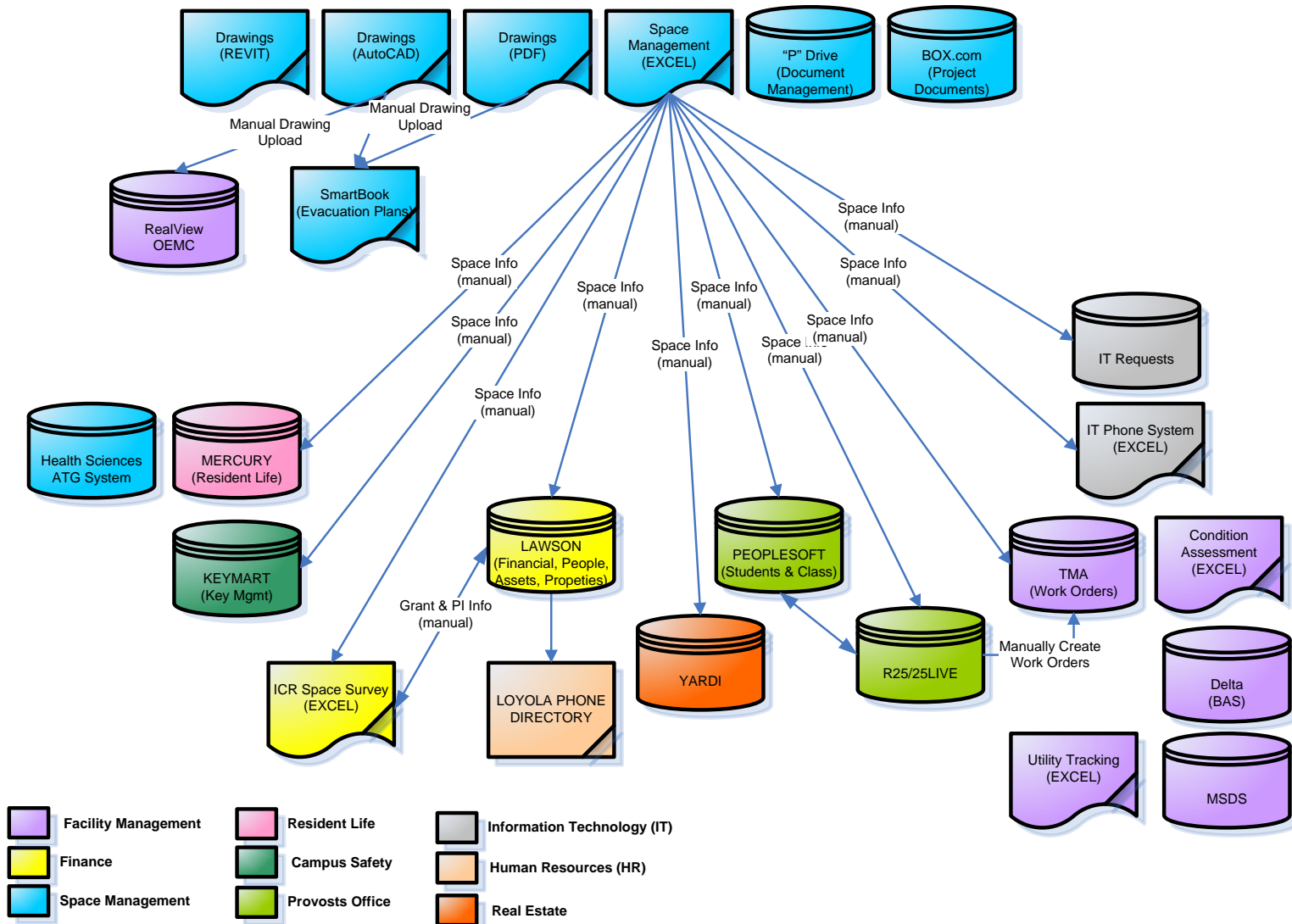
- 24 unique systems

- 10 manual data loads of space management information

- $250,000 annually spent on manually gathering and entering space information and generating reports
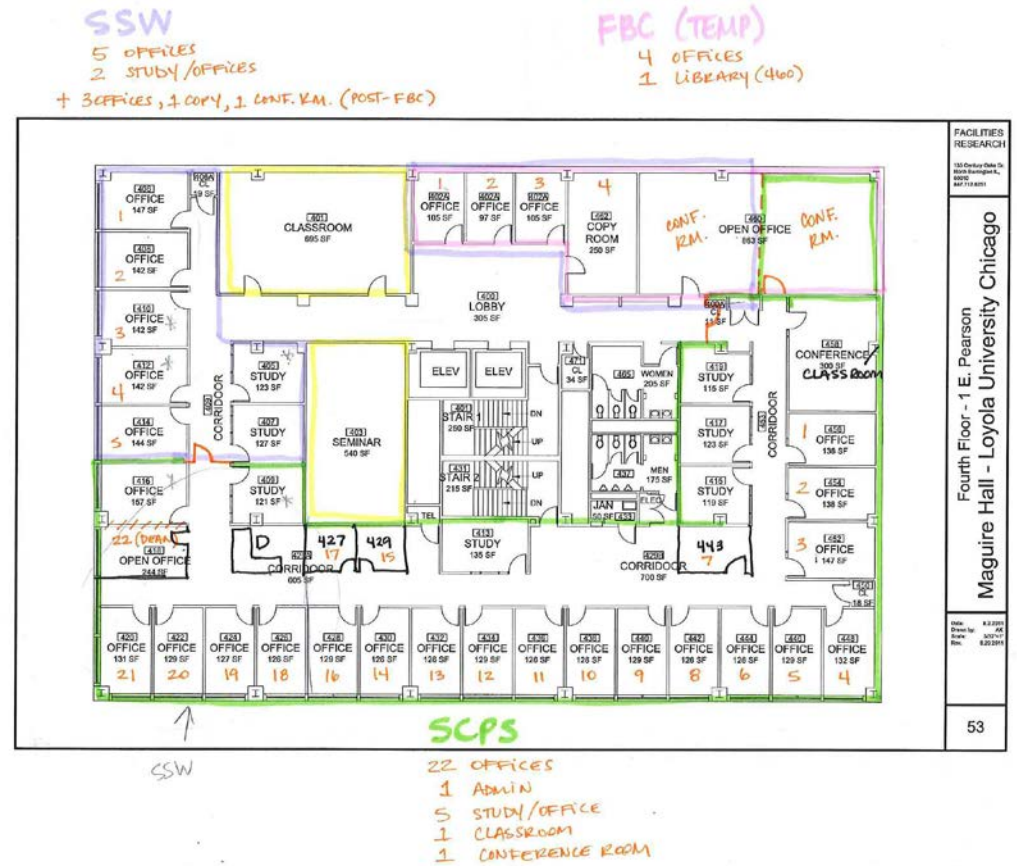
- 2 manual drawing uploads

EXAMPLE: SPACE ALLOCATION EXERCISE

EXAMPLE: SPA SPACE SURVEY

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Bldg N	Bldg Name	Floor Plan Room No.	Facilities Confirmed Room No	Room Type	Room Type	Room Func	ASF	% br down	Joi nt se	Oc cu	No t Us	Last Name, First Name	Old - Department	Old - Depart ment	Updated - Department	Updated Dept Cod
584	202	Quinlan Life Science	505	505	Aquatic Simulation Lab	2100		2,174		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
585	202	Quinlan Life Science	236	236	Arthropod	2200		275					Lammers, Roberta	BIOLOGY		2112 BIOLOGY	2112
586	202	Quinlan Life Science	142	142	Auditorium (Lecture Area)	6100		1,050						BIOLOGY		2112 BIOLOGY	2112
587	202	Quinlan Life Science	244	244	Autoclave	0100		320						BIOLOGY		2112 BIOLOGY	2112
588	202	Quinlan Life Science	022	022	Behavioral Test Room	2200		95						BIOLOGY		2112 BIOLOGY	2112
589	202	Quinlan Life Science	023	023	Behavioral Test Room	5700		95		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
590	202	Quinlan Life Science	116	116	Biology CLASSROOM Laborator	2100		1,185					Heller, Jutta	BIOLOGY		2112 BIOLOGY	2112
591	202	Quinlan Life Science	117	117	Biology CLASSROOM Laborator	2100		1,200						BIOLOGY		2112 BIOLOGY	2112
592	202	Quinlan Life Science	316	316	BIOLOGY CONFERENCE	3110		395					Berg, M. & E. Rosi-Marshall	BIOLOGY		2112 BIOLOGY	2112
593	202	Quinlan Life Science	118	118	Biology Lab	3130		1,220		Y			various instructors	BIOLOGY		2112 BIOLOGY	2112
594	202	Quinlan Life Science	121	121	Biology Prep	3130		290					Thomas, Timothy	BIOLOGY		2112 BIOLOGY	2112
595	202	Quinlan Life Science	340	340	Biology Supply	7400		150					Haas, Barbara	BIOLOGY		2112 BIOLOGY	2112
596	202	Quinlan Life Science	317C	317C	BUSINESS MANAGER	3110		140						BIOLOGY		2112 BIOLOGY	2112
597	202	Quinlan Life Science	036		Cage Clean	0100		65					Grande, Terry	BIOLOGY			2112
598	202	Quinlan Life Science	317D	317D	CHAIR	3100		290						BIOLOGY		2112 BIOLOGY	2112
599	202	Quinlan Life Science	133	133	Chemical Storage	0300		210						BIOLOGY		2112 BIOLOGY	2112
600	202	Quinlan Life Science	115	115	Chemistry CLASSROOM Laborat	2100		2,350						BIOLOGY		2112 BIOLOGY	2112
601	202	Quinlan Life Science	125	125	Chemistry Prep Instrument	7400		475		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
602	202	Quinlan Life Science	034	034	Clean ASSEMBLY	0100		210		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
603	202	Quinlan Life Science	138	138	CLOSET	2200		80						BIOLOGY		2112 BIOLOGY	2112
604	202	Quinlan Life Science	315	315	Computer CLASSROOM Laborat	3500		990					Tuchman, Nancy	BIOLOGY		2112 BIOLOGY	2112
605	202	Quinlan Life Science	054	054	Con Focal Microscope	5300		150						BIOLOGY		2112 BIOLOGY	2112
606	202	Quinlan Life Science	317A	317A	COPY/FAX/FILES	3110		250					Doering, Jeffrey	BIOLOGY		2112 BIOLOGY	2112
607	202	Quinlan Life Science	130	130	CORR. CHEM STORAGE	2200		140		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
608	202	Quinlan Life Science	126	126	Cylinder Storage	7400		25		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
609	202	Quinlan Life Science	127	127	Cylinder Storage	7400		25		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
610	202	Quinlan Life Science	128	128	Cylinder Storage	7400		35		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
611	202	Quinlan Life Science	058	058	DARKROOM	5700		125						BIOLOGY		2112 BIOLOGY	2112
612	202	Quinlan Life Science	052	052	Digital Imaging	2200		130		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
613	202	Quinlan Life Science	037	037	Dirty Room	2100		195						BIOLOGY		2112 BIOLOGY	2112
614	202	Quinlan Life Science	215	215	Ecology Lab	2200		1,170					Rochlin, William	BIOLOGY		2112 BIOLOGY	2112
615	202	Quinlan Life Science	055	055	EM Sec. (Electron Microscope S	5300		185		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
616	202	Quinlan Life Science	245	245	EQUIPMENT	3100		495						BIOLOGY		2112 BIOLOGY	2112
617	202	Quinlan Life Science	035	035	EQUIPMENT	0100		85					Grande, Terry	BIOLOGY		2112 BIOLOGY	2112
618	202	Quinlan Life Science	505A	505A	EQUIPMENT	7200		98		Y			Shared	BIOLOGY		2112 BIOLOGY	2112
619	202	Quinlan Life Science	341	341	Faculty Office	3130		148					Boussy, Dr. Ian	BIOLOGY		2112 BIOLOGY	2112
620	202	Quinlan Life Science	122	122	Faculty Office	3130		160						BIOLOGY		2112 BIOLOGY	2112

EXAMPLE: PHONE MOVE

School	First Name	Last Name	Maguire Office #	Maquire Summer Office	Office in Schreiber	Existing Phone # to be moved	New Phone Number
QSoB	Kathy	Acles	216	448	331	57519	
QSoB	Alana	Aldort	124	531	115A	57810	
QSoB	Eydie M	Appleton	542A		501A	57111	
QSoB	Bobby	Barnes	548		423	56608	
QSoB	Raymond	Benton	440			56137	
QSoB	John	Boatright	420		726	56994	
QSoB	Sara	Bujas		548	123	56600	
QSoB	John	Caltagirone	370	402A	317	56574	
QSoB	Amy	Choi	552		714	56320	
QSoB	Mine	Cinar	540		728	56066	
QSoB	Timothy	Classen	534		420	56184	
QSoB	Gregory	Costanzo	24?	456	118	57907	
QSoB	Julian	Diaz	538		425	57045	
QSoB	Wren	Donofrio	117A	534	122	56665	

EXAMPLE: UTILITY CONSUMPTION TRENDS
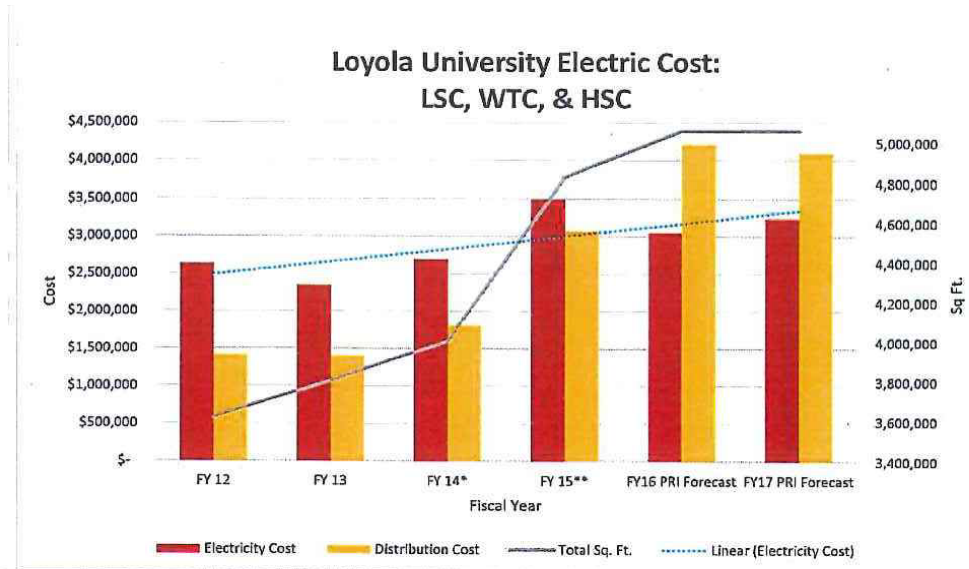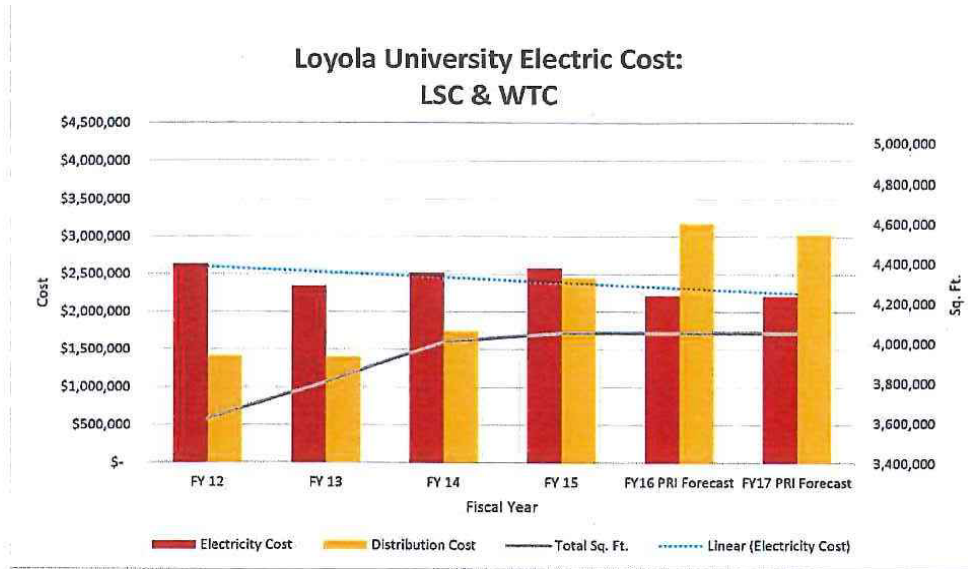
Loyola University Electric Cost: LSC & WTC

Loyola University Electric Cost: LSC, WTC, & HSC

Loyola's Electric Consumption	Electricity Cost	Distribution Cost	Total Electric Cost
FY 12	$ 2,633,401	$ 1,410,946	$ 4,044,347
FY 13	$ 2,348,498	$ 1,404,688	$ 3,753,186
FY 14	$ 2,519,889	$ 1,751,340	$ 4,271,229
FY 15	$ 2,580,858	$ 2,454,332	$ 5,035,189
FY16 PRI Forecast	$ 2,214,275	$ 3,178,877	$ 5,393,152
FY17 PRI Forecast	$ 2,212,456	$ 3,034,377	$ 5,246,833

Electric usage totals include Lakeshore Campus and Water Campus

LSC & WTC	Total kWh usage	Total Sq. Ft.	kWh/Sqft
FY 12	53,621,628	3,621,208	14.8
FY 13	55,483,495	3,806,401	14.6
FY 14	57,289,211	4,007,286	14.3
FY 15	57,755,517	4,051,788	14.3
FY16 PRI Forecast	57,952,580	4,051,788	14.3
FY17 PRI Forecast	57,952,580	4,051,788	14.3

Loyola's Electric Consumption	Electricity Cost	Distribution Cost	Total Electric Cost
FY 12	$ 2,633,401	$ 1,410,946	$ 4,044,347
FY 13	$ 2,348,498	$ 1,404,688	$ 3,753,186
FY 14*	$ 2,695,469	$ 1,813,442	$ 4,508,911
FY 15**	$ 3,502,718	$ 3,070,021	$ 6,572,739
FY16 PRI Forecast	$ 3,053,026	$ 4,213,945	$ 7,266,971
FY17 PRI Forecast	$ 3,241,049	$ 4,105,020	$ 7,346,069

Electric usage totals include Lakeshore, Water Tower, and Health Science Campus

* In FY14 first year to include HSC electric usage (April - June)

**In FY15 first year to include a full year of HSC electric data (Sq. Ft. and kWh totals)

LSC, WTC, & HSC	Total kWh usage	Total Sq. Ft.	kWh/Sqft
FY 12	53,621,628	3,621,208	14.8
FY 13	55,483,495	3,806,401	14.6
FY 14*	63,936,329	4,007,286	16.0
FY 15**	77,568,319	4,827,629	16.1
FY16 PRI Forecast	79,192,999	5,060,629	15.6
FY17 PRI Forecast	79,192,999	5,060,629	15.6

CURRENT STATE SYSTEMS MATURITY

Area	System	End to End Automation	Functional Performance	Consistent Solution	Integration	Workflow Enablement	Level of Customization	Life Expectancy	TOTAL	AVERAGE
City of Chicago First Responders	OEMC Panel/ Real View	1	3	3	1	2	3	5	18	2.6
Document Management	"P" Drive	1	1	3	1	1	5	5	17	2.4
Document Management	BOX.com	3	2	3	3	3	5	5	24	3.4
Drawing Management	AutoCAD	1	3	2	1	1	5	5	18	2.6
Drawing Management	PDF	1	3	2	1	1	5	5	18	2.6
Drawing Management	REVIT	1	3	2	3	1	5	5	20	2.9
Evacuation Plans	MRSA, SMARTBOOK	1	3	1	2	1	3	5	16	2.3
FM: Condition Assessment	Spreadsheet	1	3	3	1	1	5	5	19	2.7
FM: Work Orders	TMA	4	4	5	1	1	3	5	23	3.3
ICR Space Survey Process	Spreadsheet	1	3	3	1	1	1	3	13	1.9
Material Safety Data Sheets	SDS Pro	1	3	3	1	1	3	5	17	2.4
Resident Services Space Inventory	Mercury	1	3	3	1	1	3	5	17	2.4
Space Management	Spreadsheet	1	1	2	1	1	1	1	8	1.1
Utility Tracking	Spreadsheet	1	1	1	1	1	1	1	7	1.0
Move Management	Spreadsheet	1	1	2	1	1	1	1	8	1.1

Key:
Mature
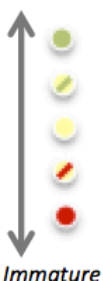
Immature

Overall Maturity 2.3

CURRENT STATE PROCESS MATURITY

Functional Area	Level 1: Initiated	Level 2: Defined	Level 3: Reportable	Level 4: Managed	Level 5: Predictable
Space Inventory Management	●				
Drawing Management		●			
Reporting	●				
Indirect Cost Recovery Process			●		
Work Order Management			●		
Move Management	●				
Utility Reporting	●				

Loyola Average (1.7)   Minimum Goal (4.0)

Less Mature → More Mature

Legend:

● Current State

| Desired State

| Current Average
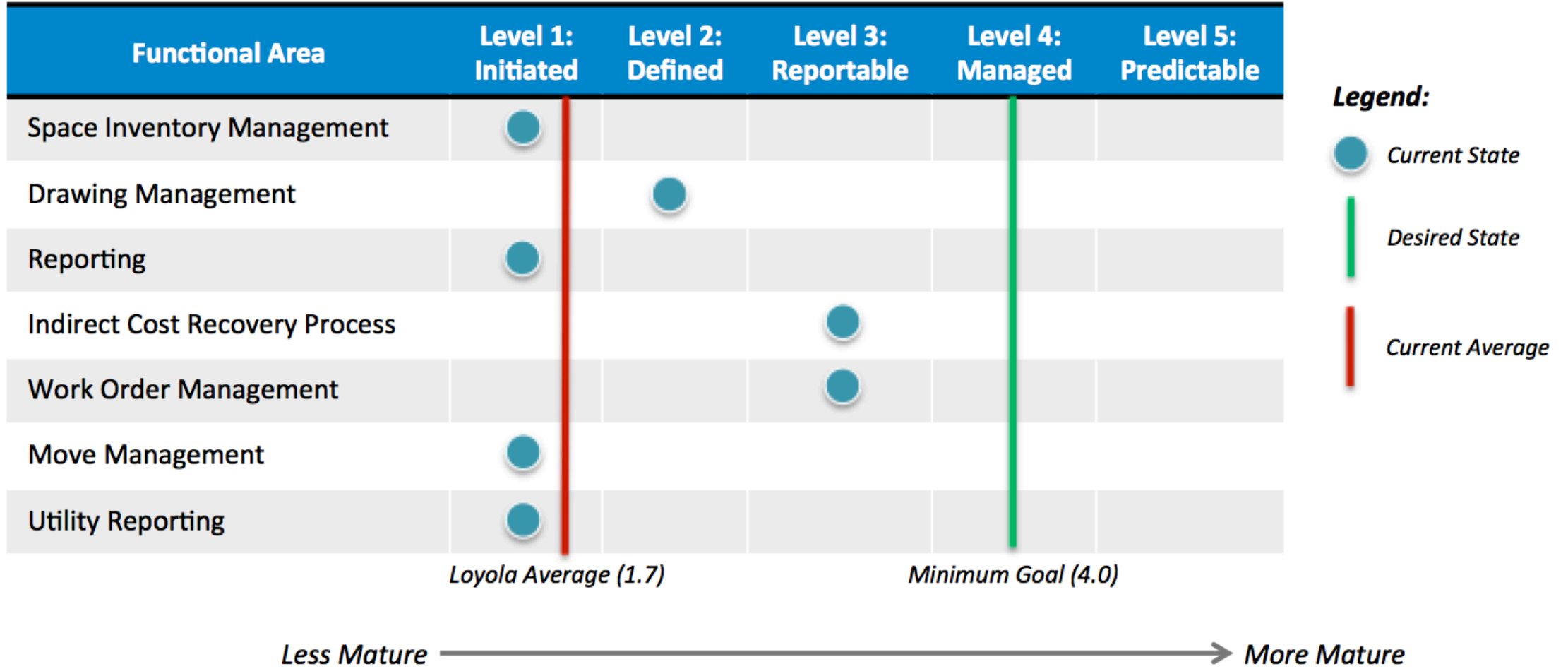
INTEGRATED WORKPLACE MANAGEMENT SYSTEM (IWMS) SOLUTIONS

$

No Impact

Option 1:   Status Quo

Option 2:   IWMS for Space Management

Option 3:   IWMS for Space + Indirect Cost Recovery Survey (ICR)

Option 4:   IWMS for Space + Indirect Cost Recovery Survey + Move Management

Option 5:   IWMS for Space + Move Management + Indirect Cost Recovery Survey + Work Orders

$$$$

High Impact

OPTION 3: IWMS FOR SPACE + ICR SURVEY

Technology Solution:
- Space Management (MS Excel): IWMS
- Reporting Process (Manual): IWMS Reporting
- Indirect Cost Recovery Survey Process (Manual): IWMS
- Drawing Management (PDF): Discontinue
- Automated Integrations from IWMS to Multiple Tools

Strengths:
- Goal and objectives are increasingly being addressed
- Central data repository for space management data and reporting
- Minimize/eliminate the need for manual data entries for space information into various campus tool through automated integrations
- Reporting is streamlined and easy to produce with accuracy
- Graphical interface between drawings and space management data
- Energy management reporting with ease in central data repository
- Emergency preparedness tracking and reporting in central data repository
- Improved processes and confidence in data and reporting
- Increased space and drawing accuracy supporting research and grant funding
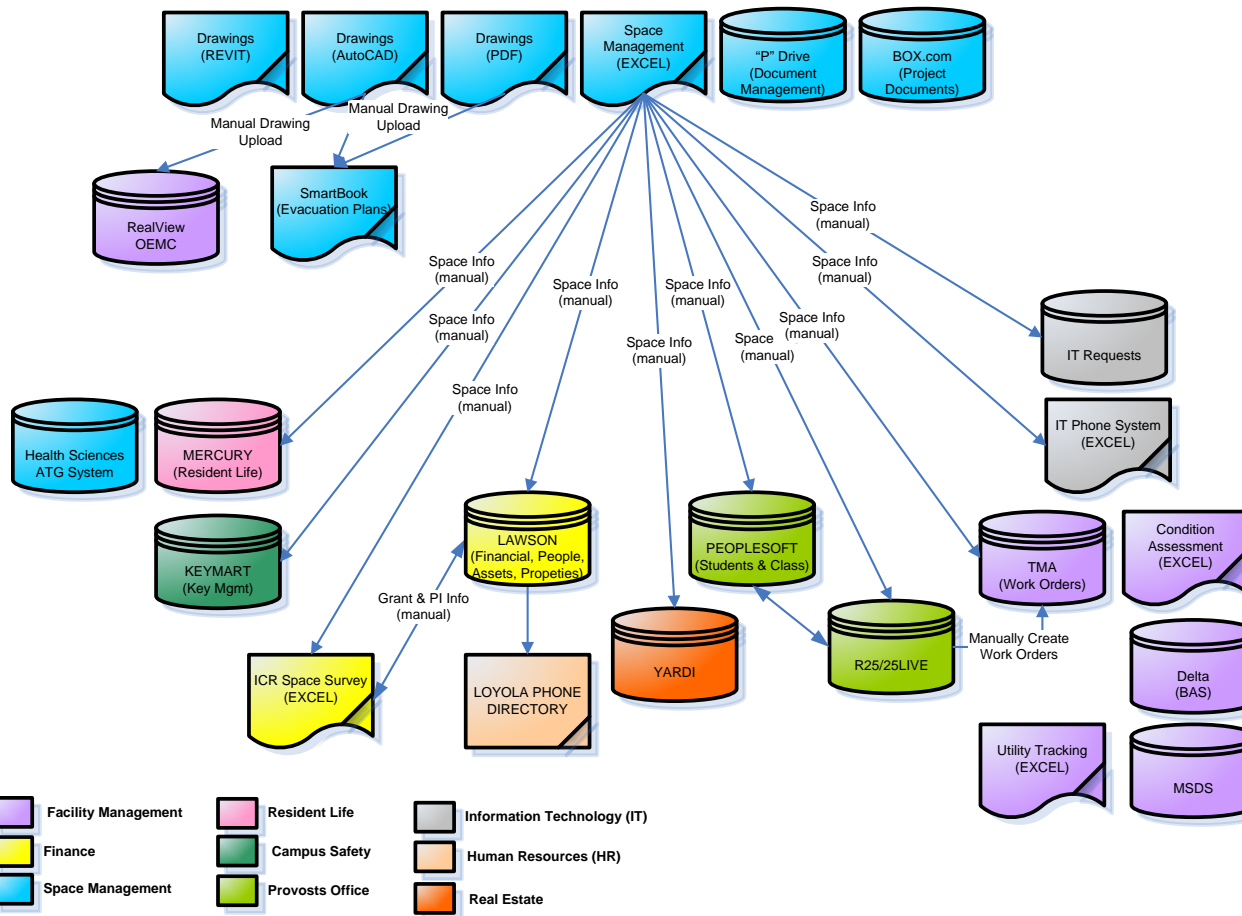- Decrease in the time to complete ICR survey

Weaknesses:
- Med-High change management effort
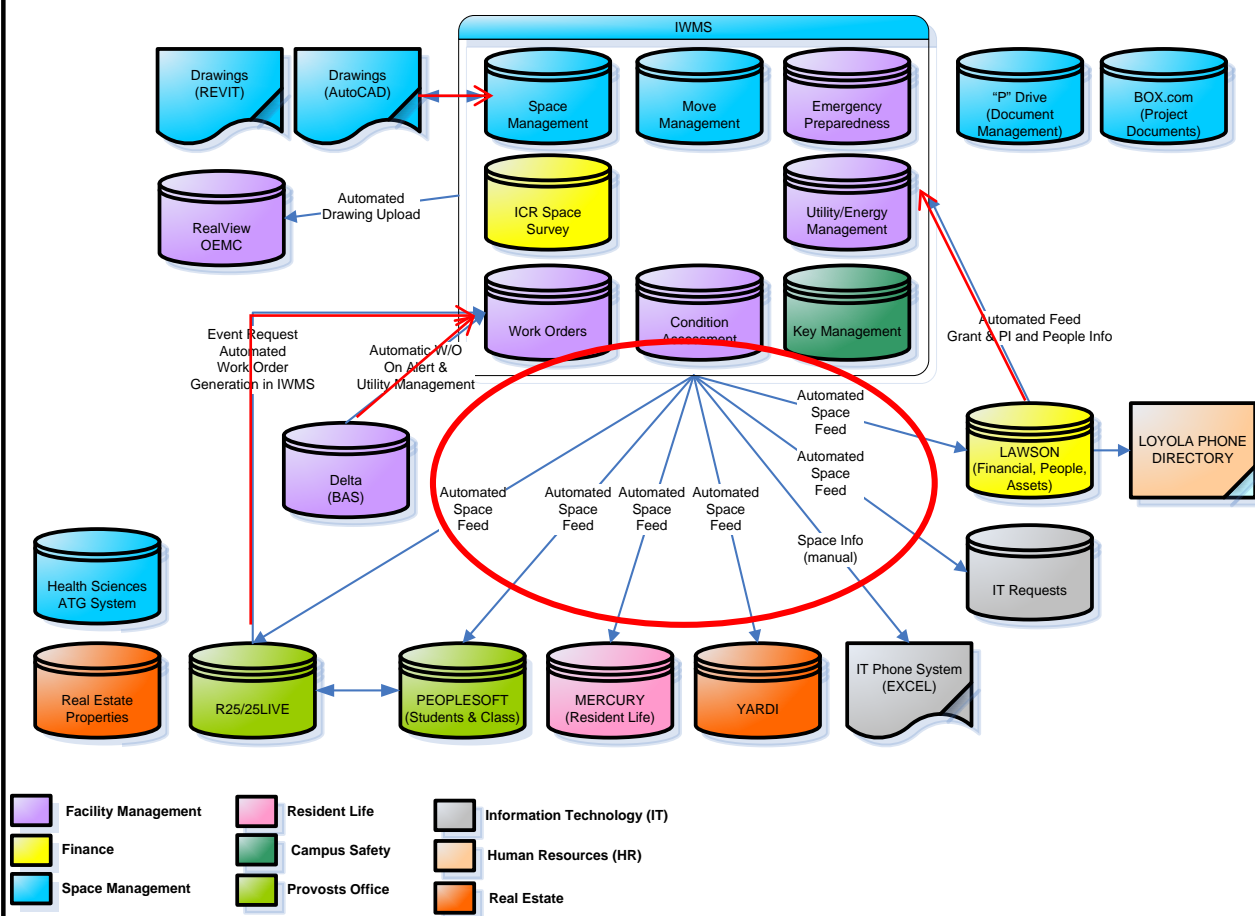- Med-High incremental cost

IWMS BEFORE & AFTER

RECOMMENDED SOLUTION

Business Objective	Option 1 Status Quo	Option 2 Space Management	Option 3 Space + IDC Survey	Option 4 Space, Move, IDC Survey	Option 5 Space, Move, IDC Survey + Work Orders
High Level Implementation Cost Estimates	$0	$381K - $650	$575K – 1.0M	$638K – 1.2M	$762K – 1.5M
5 Year Cash Flow	$0	$187K	$121K	$341K	$659K
10 Year Cash Flow	$0	$114K	-$286K	-$254	$356K
Payback Period	N/A	8.1 Years	6.4 Years	10 Years	N/A
Support For Business Objectives Overall Score	20%	90%	90%	100%	100%
Overall Process Maturity Score	1.7	2.7	3.0	3.9	4.0
Overall Systems Maturity Score	2.3	3.0	3.2	3.7	4.1
Change Management Effort	Low	Med	Med	High	High

Recommended Option for Consideration:
Option 3 Features
- IWMS Space Management
- IWMS Indirect Cost Recovery Survey
- Build 9 Key Integrations
- Drawing Clean Up

CASH FLOW MODEL

Option 3: IWMS for Space Management & Indirect Cost Recovery Survey	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Ongoing Savings						
Annual Cost Savings	$200,406	$186,906	$186,906	$200,406	$186,906	$961,530
Total Savings:	**$200,406**	**$186,906**	**$186,906**	**$200,406**	**$186,906**	**$961,530**
One-Time Costs						
Implementation Costs	-$390,551	-$150,000	$0	-$50,000	$0	-$590,551
Software Costs	-$38,195	$0	$0	$0	$0	-$38,195
Ongoing Costs						
Support Costs	-$20,000	-$20,000	-$20,000	-$20,000	-$20,000	-$100,000
Software Costs	-$5,754	-$5,754	-$5,754	-$5,754	-$5,754	-$28,770
CAD/CAFM Administrator	-$65,000	-$65,000	-$65,000	-$65,000	-$65,000	-$325,000
Hardware Costs	$0	$0	$0	$0	$0	$0
Total Costs:	**-$519,500**	**-$240,754**	**-$90,754**	**-$140,754**	**-$90,754**	**-$1,082,516**
Net Cash Flow (NCF):	**-$319,094**	**-$53,848**	**$96,152**	**$59,652**	**$96,152**	**-$120,986**
Cumulative NCF:	**-$319,094**	**-$372,942**	**-$276,790**	**-$217,138**	**-$120,986**	

RESULTS

- Loyola will benefit from an Integrated Workplace Management System
  - <u>Finance:</u> redeploy 465 hours annually + 180 hours every 4 years; accurate F&A rate calculations; accurate tracking of assets for disposal and depreciation
  - <u>ITS:</u> track location and age of security cameras; accurate personnel and equipment location for service calls
  - <u>Facilities:</u> redeploy 900 hours annually; accurate reporting out of space for surveys; provide accurate floorplans to departments
  - <u>Provost's Office:</u> efficient space utilization; avoid duplication of space; easily query classroom/lab data and office assignments
  - <u>Student Development:</u> redeploy 1,080 hours tracking and managing inventory in residence halls; eliminate duplication of data entry with R25, TMA, classroom grid
- Minimum 3.5 FTE productivity redeployment (only 5 major areas interviewed)
- Payback Period: 6.4 years
- Timing: Budget compression vs. campus redevelopment lull

NEXT STEPS

- ITESC prioritization

- BRT review and approval

- Reallocate Facilities Pool dollars to fund 1st and 2nd year implementation cost

Agenda

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Phone System Replacement
- **D. Vonder Heide**

Information Security Update
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Disaster Recovery Update
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LUHS Workday Migration-LUC Process Analysis
- J. Sibenaller

anywhere
anytime
accessLUC

Telephone System Replacement

Presentation to ITESC
March 29, 2016

Topics for Discussion

- Brief History
- Known Risks
- Loyola's Environment
- Telephony Landscape
- Requirements & TAC
- Recommendation & Costs
- Timeline
- Discussion

Brief History

- WTC Installed 1988
  - Software upgrade 2004
- LSC Installed 1988
  - Upgraded in 2007
  - Excluded Granada, Simpson & Fairfield

Size & Scope

- 5,700 Telephones
- 9,200 DID Numbers
- 515 Emergency Phones
- 43,000 Outbound Calls
- 3,400 Switchboard Calls
- 15,000 Voicemail Messages

Risks – Why We're Addressing This Now

- Current maintenance contract expires June 2017
- Near end for most options to extend life of current equipment
  - Now WTC and parts of LSC are 28 years old and are EOL
  - Extended maintenance agreement under "best effort" circumstances; Replacement/repair of older equipment is best effort from Avaya
  - Harvested parts from old system from Jesuit Residence
  - Upgraded software to stay appropriately current
    - WTC was 2004
    - LSC was 2007
- Equipment Power Source is Obsolete
  - AC/DC issue (LT, CLC, Maguire, Simpson, Granada)
- Call accounting no longer supported (rates, area codes, in-bound calls)
- No enhanced features, not evolving for certain University offices (less risk/more of impedance – real time reporting)
- Project has been deferred for five years

Options

1. Replacement/Upgrade
   - Capital planned in FY17
   - TAC research results

2. Extend Maintenance Again w/ 3rd Party DC Power Support
   - Best effort, no guarantees
   - Avaya will not engage until six months prior to contract termination

3. Complete 3rd Party System Support
   - Early stage of investigation
   - Not certain this will solve maintenance issue on all parts

4. Replacement with Refurbished Parts
   - Early stage of investigation

Current Environment

Current Environment

Current Environment

Lewis Towers, Lower Level

Current Environment

Maguire Center, Penthouse

Current Environment

Dumbach Data Center

Current Environment

Dumbach Data Center

Current Environment
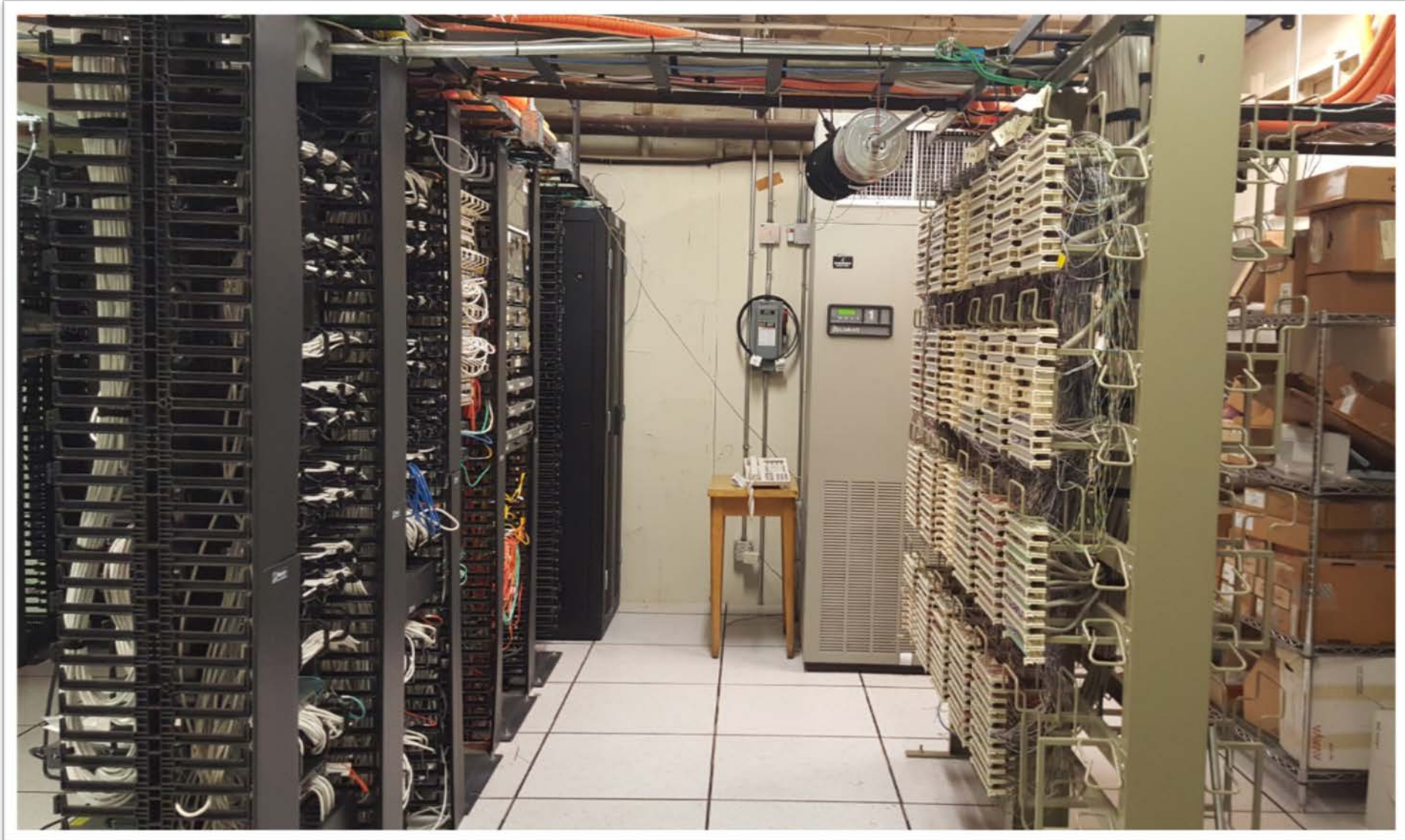

Mundelein

Simpson

Granada

Bellarmine

Current Environment

Current Environment

Changing Landscape

- Phasing out the PBX

- Unified Communications

- Desk phone-less environment

- Mobile Centric

- Change in overall call volume – people connect via the web

Culture of the organization drives changes requirements

CRAIN'S
CHICAGO BUSINESS.

Print Story   Printed from ChicagoBusiness.com

Even large firms are cutting landlines

By Brigid Sweeney February 13, 2016

If you stop in the Near West Side offices of data science company Civis Analytics, you'll see exposed brick, an open floor plan, lots of millennial workers—and no desk phones. The company has exactly one landline, for its reception desk. "If it rings twice an hour, that's a lot," says Lisa Rodriguez, vice president of operations.

Civis' 100 employees prefer Gchat for one-on-one conversations with colleagues, messaging service HipChat for larger team discussions and, for client calls, speaker boxes that connect via Bluetooth to cellphones and laptops.

The stodgy desk phone, which tethers an employee to a permanent workspace, contradicts "the whole idea of an agile, collaborative, modern, mobile-first workspace," says Tom Bianculli, vice president of Zebra Technologies' emerging technology office. The company's Zatar unit in the West Loop, which sells cloud-based software, has fewer than 10 landlines hooked up in meeting rooms.

While tech companies and startups were early adopters of landline-free offices, the benefits of cutting the cord have become so great that bigger companies are following suit.

Leo Burnett ditched its physical phones in November. The ad agency's 1,600-plus Chicago workers now have Bluetooth headsets, and voicemails are immediately transcribed to email. Many employees automatically forward their work numbers to their cellphones.

'SIGNIFICANT SHIFT'

Even old-line professional services and law firms have moved away from traditional landline phone systems, prompted by updates to their buildings' cabling, their executives' need for secure communication channels outside the office and the desire for such extra capabilities as voicemail-to-email transcription.

"We're seeing a significant shift in the marketplace," says John Shave, who launched Globalcom, one of the first phone services to use fiber cabling instead of old-fashioned copper cabling, in Chicago in 1993 and sold it for $55 million in 2008.

He's created Xtracom, which provides "unified mobility" services that connect a worker's primary phone line to any device or location. Demand is booming as employees increasingly travel globally, work from home or move their workstation within the office depending on the day's tasks.

Technology Assessment Committee (TAC)

- Jeff Ambrose (ITS, Infrastructure)
- Chris Campbell (ITS, UISO)
- John Campbell (Bursar)
- David Gabrovich (ITS, Networks)
- Mike Lonero (Law School)
- Alison Stillwell (ITS, Help Desk)
- Loretta Wolski (LUMC IT)
- David Wieczorek (ITS, Networks)
- Florence Yun (ITS, Project Management Office)

Requirements

Question	Cumulative					
Business and Functional Requirements	**Altura**	**AT&T**	**CDW**	**SWC**	**Comments**	**Elabor**
1) Bridged extension numbers onto multiple phones	23	23	23	14	Alison: Altura-anything std meets requirements	Mike: Altura - X
2) Call Coverage, traditional and follow me on/off campus	23	25	25	26	Alison: Altura-anything std meets requirements	Mike: Altura - X Mike: SWC - X
3) Call forwarding on/off campus	23	23	22	23	Alison: Altura-anything std meets requirements Alison: CDW- sorry, im not going to look up all their responses	Mike: Altura - X Mike: AT&T - X Mike: SWC - X
4) Call hold	23	22	22	24	Alison: Altura-anything std meets requirements	
5) Call Transfer	23	22	22	24	Alison: Altura-anything std meets requirements	Mike: Altura - X Mike: AT&T - X Mike: CDW - X Mike: SWC - X
6) Flexible call routing (ext to ext, least cost routing, digit conversion, etc)	23	24	24	24	Alison: Altura-anything std meets requirements	Mike: Altura - X Mike: AT&T - X
7) Inter-campus dial plan	23	23	21	22	Jeff: CDW - Are all endpoints and gateways are centrally managed by the CUCM cluster? Alison: Altura-anything std meets requirements	Mike: Altura - X Mike: AT&T - X Mike: SWC - X
8) Extension busy indicators	24	26	21	25	Alison: Altura-anything std meets requirements	Mike: Altura - X
9)		21				Altu...

Scoring

	Requirements	Weight	Avaya	Cisco	Microsoft
Functional	74	30%	2144	2074	2168
Technical	17	20%	342	344	358
Services	23	15%	409	396	407
Vendor	7	5%	173	173	165
Pricing	5	30%	104	79	85
Total	126	100%	3172	3066	3182

Why Avaya?

- Ability to leverage existing sets

- Initial investment less

- Minimal disruption to user community

- Concern of network stability

- PBX Retirement Strategy vs Rip & Replace
  - Loyola will still need to make continued investments in our telephony environment over time

What's Gartner Saying?

- TDM, SIP/VoIP, Cloud … blended
- Avaya has nearly double the market of Microsoft
- Microsoft up and coming
- Why we excluded Cisco
  - Proprietary (per Gartner)
  - Cost – Implementation & Support
  - Compatibility with Microsoft UM

Source: Gartner (October 2015)

Other Schools

Costs

	Avaya	Microsoft
Hardware / Software Costs	$833,125	$1,273,946
Network Infrastructure	-	* $400,000
Labor	$265,508	$219,340
Contingency - 10%	$109,863	$189,286
Total	$1,208,496	$2,082,572
Reduction if HSD pulled from initial implementation	$(424,706)	$(319,481)
Revised Total	$783,790	$1,763,091
Annual Maintenance (excluding HSD) ***	$198,329	** $161,193

* Required to bring infrastructure up at all 3 campuses to support VoIP

** Set maintenance factored in at same $ amount as Avaya – $35,040 (we did not have a quote from Microsoft)

*** Current annual maintenance is $276,000

Draft Timeline
(Driven by contract expiration June 2017)

Recommendation

Based on the age and support concerns of our current telephony environment our recommendation is to upgrade our existing system with an Avaya solution.

Understanding our current financial situation we will explore how the current Avaya proposal can be reduced, including the procurement of refurbished equipment.

So that all options can equally be assessed, we will also research obtaining a 3rd party contract for our existing equipment.

Option 1:
- Replacement/Upgrade of existing systems

Option 2:
- Extend maintenance w/ adding 3rd party support.

Option 3:
- Complete 3rd party support

Option 4:
- Replacement/upgrade with refurbished hardware components

Discussion

Given the deferral of this project, the current state, the options/risks, and the financial climate, what is our appetite for taking on the capital project to address our long-term need for telephony service?

Agenda

Space Management Needs Analysis
- K. Henning

Phone System Replacement
- D. Vonder Heide

Information Security Update
- J. Pardonek, J. Sibenaller

Disaster Recovery Update
- D. Vonder Heide, J. Sibenaller

LUHS Workday Migration-LUC Process Analysis
- J. Sibenaller

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PII Program Update

Overview of Program

- Established to protect personal identities of students, faculty & staff and to protect university information assets
- Departments scan once or twice a year based on data access/risk
- Email & PDF scanning enabled to improve compliance
- Scan tool (Identity Finder) runs remotely via console

Data Steward Activities

- Inventories PC's
- Chooses timeframe for remote scan
- Coordinates with staff for overnight scan
- Reviews results of computers only where potential PII is identified
- Returns compliance form

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PII Program Update

Data Steward Concerns

- Non responsive/slow to respond
- Missing dates (set by them)
- Individuals being scanned refusing to cooperate (scanning and remediation)
- Lack of support from their departments (according to them)
- Less than thorough work / poor quality work
- Job/role changes with minimal communication
- High level of follow-up and task re-work required by UISO

PII Program Update

Late Departments Spring 2015

Student Development 7/10

Financial Aid 8/20

School of Nursing LSC 10/13

Late Departments Fall 2015

OIP 1/4

Registration and Records 1/14

Political Science 2/3

Psychology 2/5

Campus Community and Planning 2/9

Facilities 2/10

Campus Safety 2/18

Advancement/Phonathon 3/11

20% of departments are late

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Data Steward Survey - Results

Please indicate the level of ease or difficulty you have as it relates to...

Work/Role Effort	Completing Inventory	Scheduling Scans	Run Time of Scan	Tool Ease of Use	Bringing in Laptops	Remediation	Management Support	ITS Support
Very/Relatively Easy	47%	33%	16%	51%	23%	33%	47%	67%
Neither	12%	16%	22%	27%	36%	20%	33%	21%
Somewhat/Very Difficult	41%	51%	61%	22%	40%	47%	20%	13%

Select the level of appreciation you receive about your role/work as a Data Steward for...

Tasks Comments	Peers	Manager	Dept Head	ITS
Appreciate Data Steward Role	55%	76%	63%	70%
Don't Appreciate Data Steward Role	24%	2%	4%	2%
Don't Know	20%	22%	33%	28%

49 responses
70% response rate

Select the level of understanding of the PII Program...

Tasks Comments	Peers	Manager	Dept Head	ITS
Undestand the Program	37%	61%	52%	72%
Program is Unclear	43%	16%	15%	0%
Don't Know	20%	22%	33%	28%

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Survey Comments

Common Themes
- Nobody cares that we do this
- Faculty and Staff do not see the importance
- Data Stewards get variablesupport from Manager
- Not my job, work should be performed by ITS
- Lack of accurate inventory system

60 total comments

I think it would be more effective to have someone from the Security Office to do the scans. Perhaps that is not possible due to staffing. It is difficult to expect a staff member who may have little to no understanding of security measures to be responsible for the entire department's security. I have been the Data Steward for 2 years and I get a pit in my stomach thinking about trying to coordinate each scan in my office. Despite efforts to get colleagues to complete scans, I normally have to hound people to complete remediation, which makes me very uncomfortable.

Simplify the message and show an example of why this must be done in order for them to relate.

Most faculty and staff are not involved in financial areas that involve credit card or SS#s and most likely don't see the necessity of the program because of the low-risk nature of what they do.

Nobody really cares that we do this, nor appreciates the time and effort that having these extra ongoing responsibilities places upon us. It is not a trivial thing for large depts/schools.

My manager was not aware of how difficult it was to update the inventory list when I first took over it. Most of the people in our department were not very accommodating when their information were missing or undated.

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PII Program Update

Recommended Improvements

- Program Reboot
  - Senior Leadership to reemphasize the importance of the program and everyone's role
  - Mass communication to faculty/staff
- Create a Data Steward "Think Tank"
  - Identify self-correction & process improvement
- Improve inventory/asset management system

Optional Improvements

- Departmental meeting/presentation "PII Roadshow"
- Change accountability / action for non-completion
- Data Steward Awards
 - Stipend, reward system, raffle

Other Options Considered

- Hire a dedicated PII staff person
- Have a "Scan Day" instead of dept. picking timeframe

Information Security Awareness – Loyola Aware

- Program Summary
  - Purchased SANS Securing the Human video series
  - Monthly release of modules to staff and faculty
  - Participation is voluntary
  - Delivery using Sakai

- Main Concerns
  - Lack of Participation
  - Limited communication channels for promotion

- Risks
  - Increased infections & incidents
  - Loss of data
  - Loss of productivity
  - Reputation impacts

Loyola Aware Module Complete Rate

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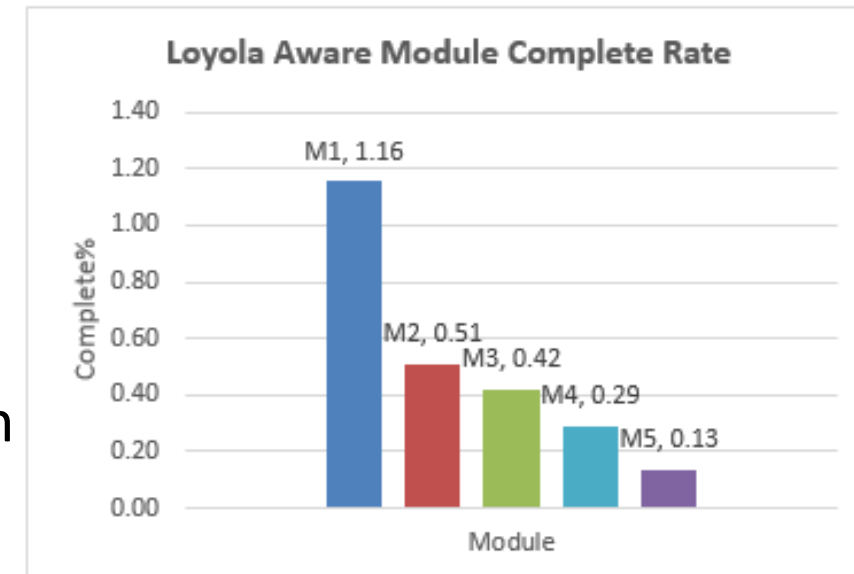
Information Security Awareness – Loyola Aware

Current Communication Methods

- Campus-Wide Marketing
    - Inside Loyola
    - UISO Newsletter / Website
    - UISO social networking (Facebook, Twitter, Blog)

- Targeted Marketing
    - Faculty/Staff Department Meetings
    - ISAC Meetings
    - Security and Donut Sessions
    - Emails to Data Stewards (Monthly)
    - Flyer insert in FOTL 2016 packet

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Information Security Awareness – Loyola Aware

Recommended Improvements

- All Faculty/Staff mailing
- Increase frequency of communications and follow-up

Future Options to Consider

- Department specific mailings
- Contest with rewards for participation
- Mandatory participation
  - Upon Hire and Annually

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Disaster Recovery Update

Tier	Initiative	DR Plans	Initial Modular Test	Annual DR Plan Update	Annual Modular Retest
M	Network	On Hold - Funding	TBD	TBD	TBD
M	DNS	Complete	Complete	In Progress	Under Review
M	VPN	Complete	Complete	Q4 FY16	Q4 FY16
M	Oracle	Complete	Complete	Complete	Under Review
M	SQL	Complete	Complete	Complete	Under Review
M	WebFocus	Complete	Complete	Q4 FY16	Q4 FY16
1	LUC.edu	Complete	Complete	Complete	Under Review
1	Enterprise Server	Complete	Waiting	TBD	TBD
1	Adobe	Complete	Complete	In Progress	TBD
1	Exchange	Complete	Complete	Complete	Under Review
1	Locus	Complete	Complete	Q4 FY16	Q4 FY16
1	Cognos ETL	Complete	Complete	Q4 FY16	Q4 FY16
1	Lawson	Complete	Complete	Q4 FY16	Q4 FY16
1	Kronos	Complete	Complete	Q4 FY16	Q4 FY16
1	CBORD	On Hold - Funding	TBD	TBD	TBD
1	T-4	In Progress	6/16 Planned	TBD	TBD
1	Maxxess	In Progress (more BC than DR)			

- Status Review
- BC Partnering
- Transition & Staffing
- TCO Review
- Tier 2/3 Handling

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LUHS Workday Migration-LUC Process Analysis - Status Dashboard

Overall Health: **Yellow**	Identify	Review	Document		Analyze	Execute
			Meeting Notes	Requirements		
Pay & Benefits	✓	✓	✓	In progress	Awaiting Workday Implementation Details	
ID's	✓	✓	✓	In progress	Awaiting Workday Implementation Details	
Shadow G/L	✓	✓	✓	In progress	Awaiting Workday Implementation Details	
Building/Parking Access	✓	✓	✓	In progress	Awaiting Workday Implementation Details	
Advancement Feeds	✓	✓	✓	In progress	Awaiting Workday Implementation Details	
Agreements/Compliance	✓	✓	✓	In progress	Awaiting Workday Implementation Details	
Library Feeds	✓	✓	✓	In progress	Awaiting Workday Implementation Details	

Key Risks/Items to Verify

- Participation/inclusion in Workday project discussions
- Paymaster services
- ID format changes
- Access to Workday/data/data views/reports
- Elimination of Shadow G/L

Other Items to Watch

- Resource availability and responsiveness
- Quantity of data to be analyzed
- Timing – June 2016 live date for Workday, extended timing for paymaster services

LUHS Workday Migration-LUC Process Analysis – Details Needed

Paymaster Services
- Can the Workday system serve as the paymaster? Has a final decision been made?

ID Format Changes
- What is the format of the Workday ID? Is there an final decision?
- With what frequency can LUC get access to new id's generated/changed id info?

Access to *Workday/data/data views/reports*
- Will any access to Workday be granted to LUC employees?
- What reports will be available?
- What data views or extracts are available? Update frequency?
  - Trinity has indicated they intend to use a tool called "Service Bus" to pull data out of Workday. It was defined that the Service Bus will not contain payroll data. How will payroll data be provided to the LUC staff who need to maintain this access?
- Can customization be made?

Elimination of Shadow G/L
- Need to confirm that this is being eliminated.

Requesting specifics/documentation regarding these 4 topics including a primary contact for Q&A.

2016 ITESC Schedule - Tentative

March 29, 2016 - Tuesday, 1:30-3:30 PM
- Space Management Needs Analysis
- Phone System Replacement
- Information Security Update
- Disaster Recovery Update
- LUHS Workday Migration-LUC Process Analysis

May 18, 2016 - Wednesday, 1:30-3:30 PM
- Tech Briefing

June 23, 2016 - Thursday, 1:30-3:30 PM
- Project Portfolio Prioritization

September 22, 2016 - Thursday, 1:30-3:30 PM

November 17, 2016 - Thursday, 1:30-3:30 PM

December 15, 2016 - Tuesday, 1:30-3:30 PM
- Project Portfolio Prioritization

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