

# ITS Executive Steering Committee (ITESC)

Agenda and Materials – December 10, 2018



# Agenda

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## Project Portfolio Prioritization

- S. Malisch, J. Sibenaller

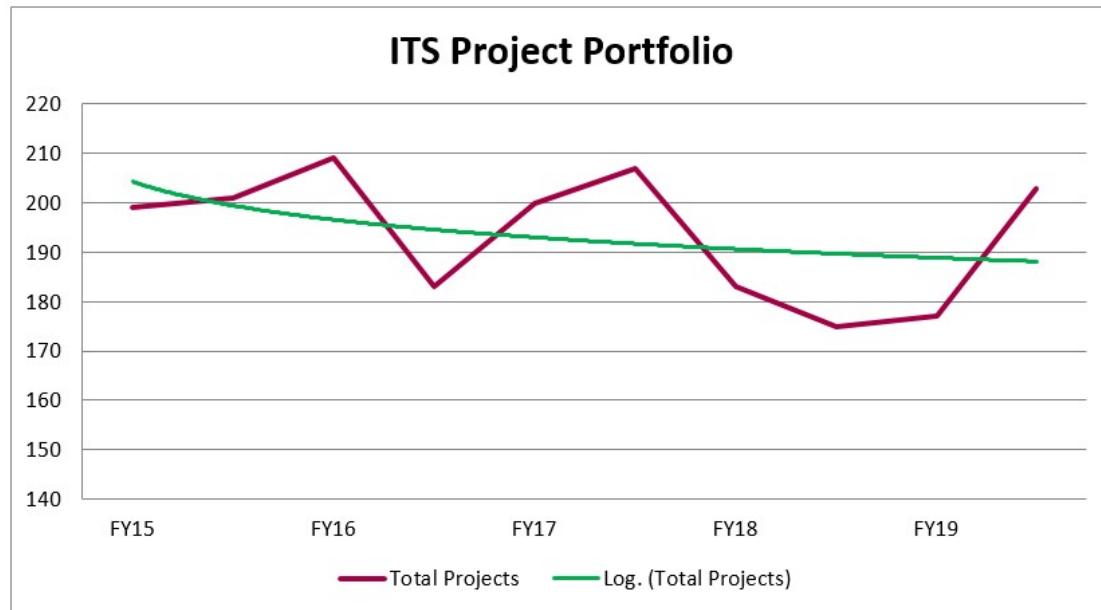
# Plan of Record Tracking

POR Activity	Total Count	T-Shirt Sizing Breakdown				
		X-Large	Large	Medium	Small	X-Small
Original FY19 Q1-Q2 POR	177	11	31	94	40	1
Revised FY19 Q1-Q2 POR	177	11	31	92	42	1
New Projects Started	58	4	10	23	18	3
Final FY19 Q1-Q2 POR	235	15	41	115	60	4
Completed Projects	(40)	1	9	19	10	1
Forecasted Completed Projects	(18)	3	1	8	6	0
Duplicate / Canceled	(6)	0	2	3	1	0
Rollover Projects	171	11	29	85	43	3
New Projects not Started	32	7	6	11	7	1
FY19 Q3-Q4 POR (Draft)	203	18	35	96	50	4
Net Change	26	7	4	2	10	3

# Project Sizing Trend

## Portfolio Counts

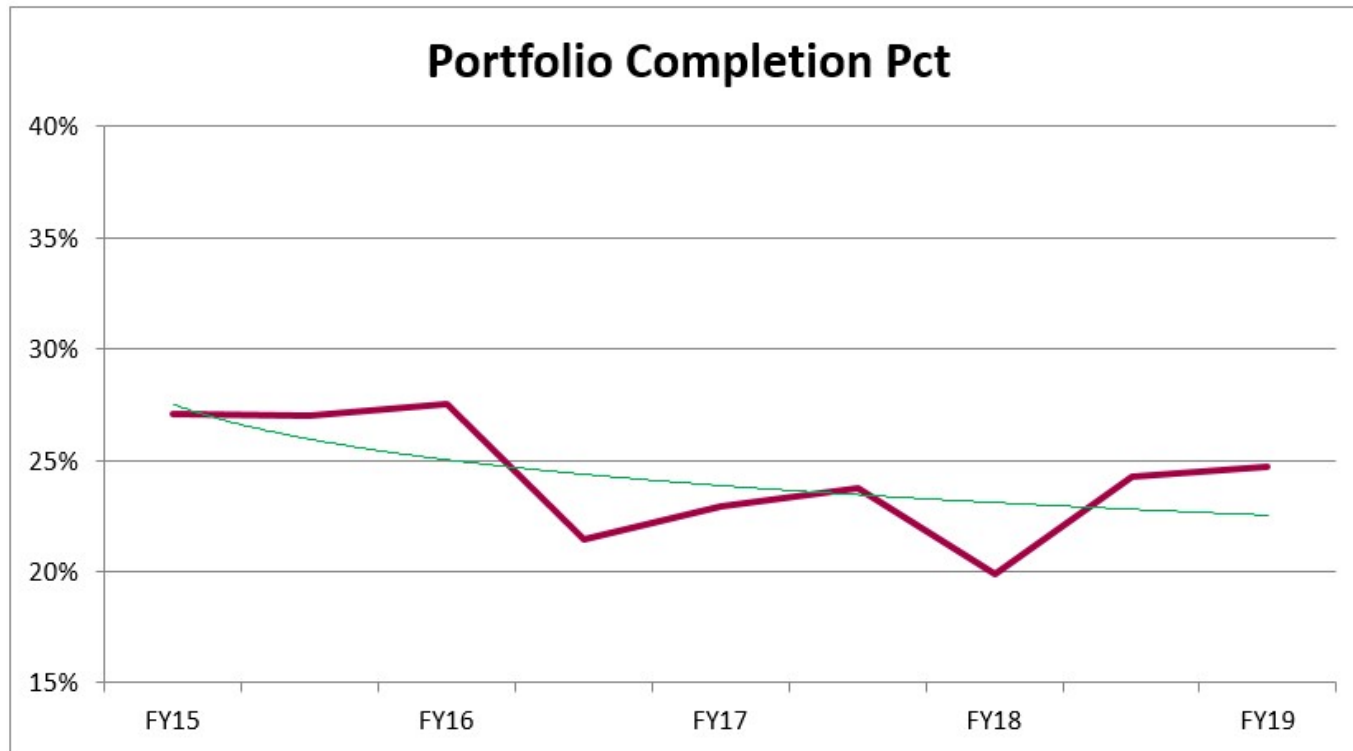
T-Shirt Sizing	Work Effort	FY15	FY15	FY16	FY16	FY17	FY17	FY18	FY18	FY19	FY19
		Q1-Q2	Q3-Q4	Q1-Q2	Q3-Q4	Q1-Q2	Q3-Q4	Q1-Q2	Q3-Q4	Q1-Q2	Q3-Q4
X-Small	< 5 Days	11	7	8	6	4	4	2	1	1	4
Small	5-30 Days	52	56	55	45	49	48	36	31	40	50
Medium	31-60 Days	80	84	85	80	94	98	96	92	94	96
Large	61-120 Days	39	36	41	37	36	37	34	36	31	35
X-Large	>120 Days	17	18	20	15	17	20	15	15	11	18
Portfolio		199	201	209	183	200	207	183	175	177	203
Completed		67	71	64	48	57	54	47	59	58	



	Avg.	Min	Max	This Period
Portfolio	194	175	209	203



# Completed Project Forecast



58 projects  
forecast  
completed  
this period

	Avg.	Min	Max	This Period
Completed Pct.	28%	20%	28%	25% (forecasted)



# Capacity Estimates

T-Shirt Sizing	Work Effort	Initial Project Count*	Project Effort** (FTE)
TBD	TBD	0	0.0
X-Small	< 5 Days	4	0.1
Small	5-30 Days	50	4.5
Medium	31-60 Days	96	18.5
Large	61-120 Days	35	13.5
X-Large	>120 Days	18	20.0
<b>Total</b>		<b>203</b>	<b>56.5</b>

\* snapshot as of 12/5/18

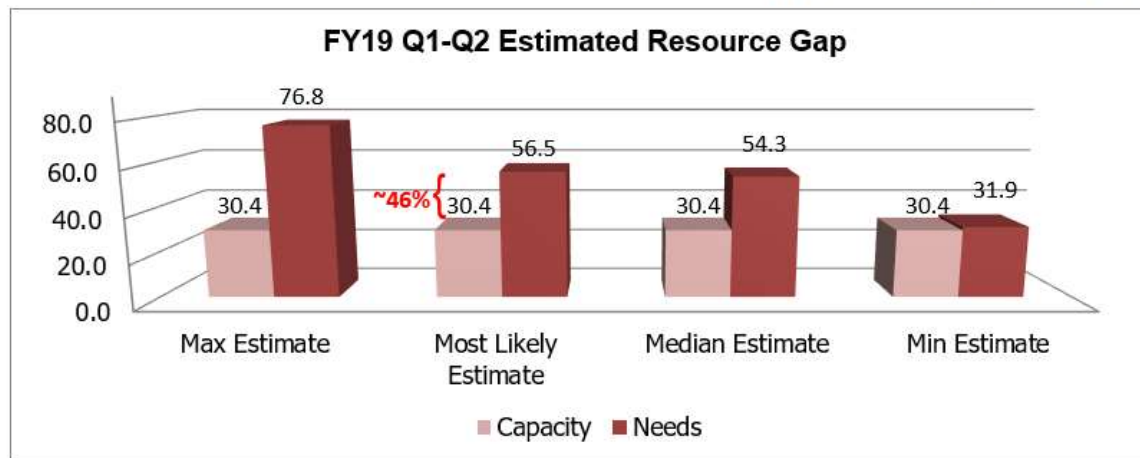
\*\* most likely scenario

ITS Capacity/Resource Calculations (FTE)	
Full Time	99.0
Part Time	1.3
<b>Annual Total</b>	<b>100.3</b>

2 FTE reduction from VTIP

	Est. Effort Allocation	Est. Time Allocation	Most Likely Estimate Gap
Admin.	25.7	26%	46%
Support	44.1	44%	
Project	30.4	30%	
<b>Total</b>	<b>100.3</b>	<b>100%</b>	

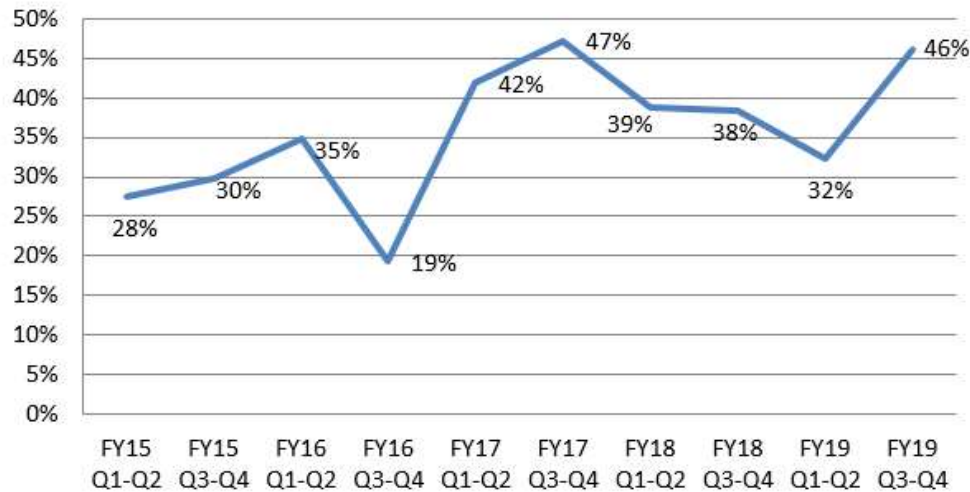
Resulted in a 2% reduction of project capacity



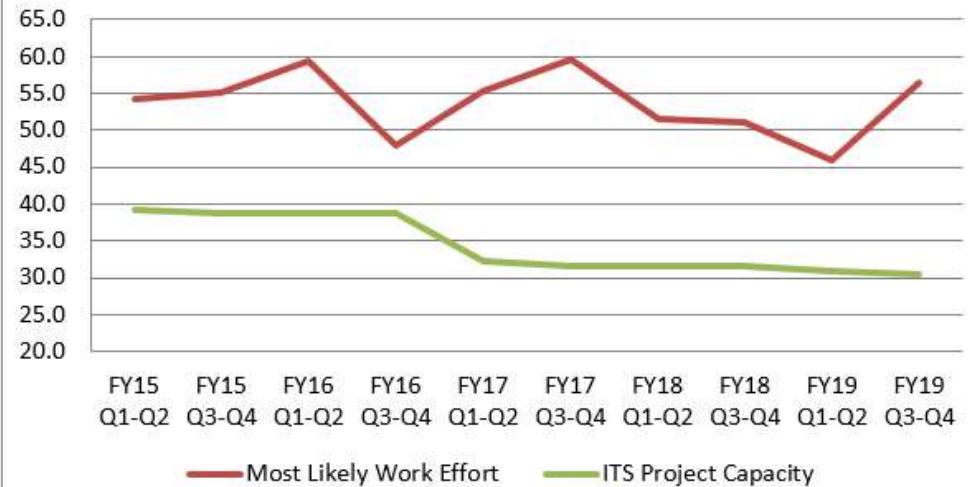
# Portfolio Growth Details

	FY15 Q1-Q2	FY15 Q3-Q4	FY16 Q1-Q2	FY16 Q3-Q4	FY17 Q1-Q2	FY17 Q3-Q4	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	5 Year Avg
<b>Portfolio Count</b>	199	201	209	183	200	207	183	175	177	203	194
<b>Portfolio Growth</b>	7%	1%	4%	-12%	9%	4%	-12%	-4%	1%	15%	
<b>Most Likely Work Effort</b>	54.2	55.2	59.4	47.9	55.3	59.7	51.5	51.0	45.8	56.5	53.7
<b>Most Likely Work Effort Growth</b>	13%	2%	7%	-24%	13%	7%	-16%	-1%	-11%	19%	
<b>ITS Project Capacity</b>	39.2	38.7	38.7	38.7	32.2	31.5	31.5	31.5	31.0	30.4	34.4
<b>ITS Project Capacity Growth</b>	2%	-1%	0%	0%	-20%	-2%	0%	0%	-2%	-2%	
<b>Estimated Resource Gap</b>	28%	30%	35%	19%	42%	47%	39%	38%	32%	46%	36%

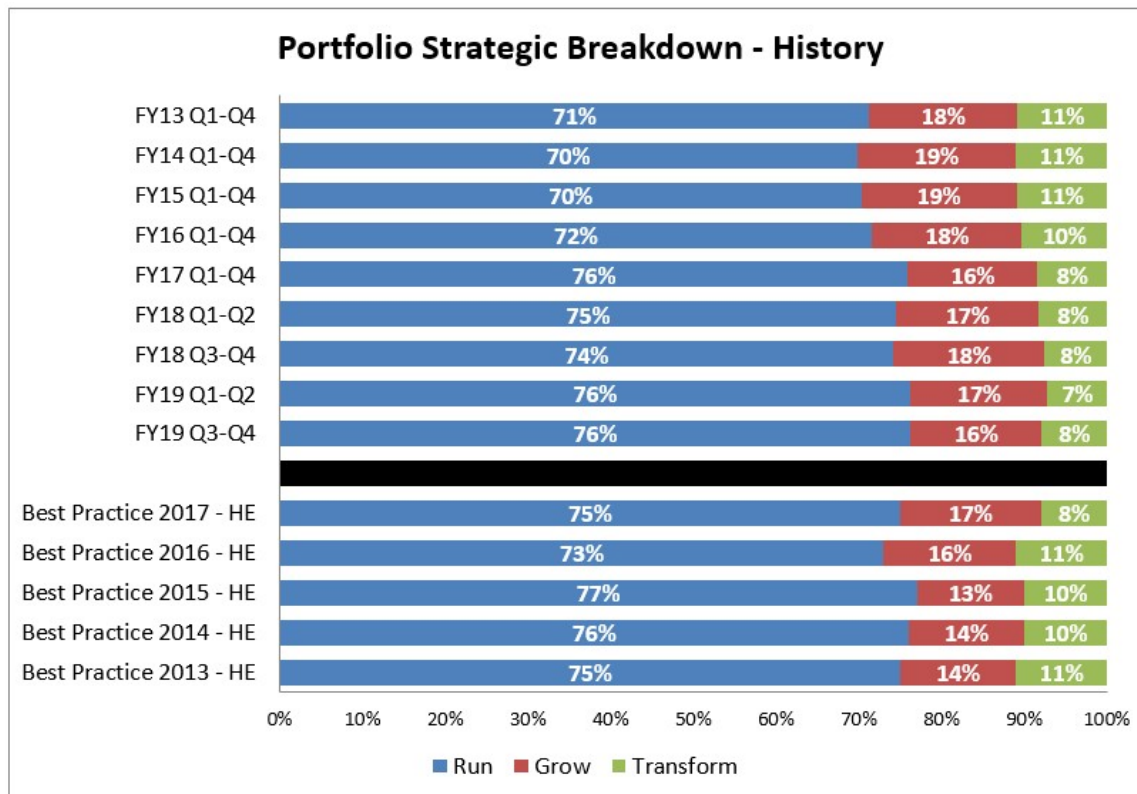
**ITS Project Portfolio Resource Gap**



**ITS Project Portfolio Resource Gap**



# ITS Project Portfolio Impact



**Run** – Ongoing operations

**Grow** – Information systems and services to optimize performance

**Transform** – New technologies and processes that fundamentally promote change



# FY19 Q3-Q4 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer	
	<b>1-8</b>	<b>LOCUS Enhancements (8)</b>	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Enterprise/Multiple</b>	
A	1	Rollout of WHAT-IF Report for Students, Faculty, and Advisors	Medium	Active	Q3 FY19	Academic Advising and Services	
A	2	GPEM Scholarship Interface - design, develop, test	Medium	Active	Q3 FY19	Enrollment Ops	
A	3	Financial Aid Award Letter Processes - Aid Year 2020	Medium	Active	Q1 FY20	Financial Assistance	
A	4	Course Schedule Builder for students integrated with LOCUS	Large	Pending	TBD	First and Second Year Advising	
A	5	Student Engagement and Persistence Pilot - Data Collection	Small	Pending	TBD	Academic Advising and Services	
A	6	Rollout of Advising Notes Feature in LOCUS	Medium	Pending	TBD	Academic Advising and Services	
A	7	Enable Plan By My Requirements in LOCUS	Small	Pending	TBD	Academic Advising and Services	
A	8	Advisor Assignment - re-design of batch process	Large	Pending	TBD	Academic Advising and Services	
	<b>9-12</b>	<b>Enterprise Content Management (4)</b>	<b>Large</b>	<b>Active</b>	<b>TBD</b>	<b>Enterprise/Multiple</b>	
A	9	Treasury to Accounts Payable EFT Approval	Medium	Active	Q3 FY19	Accounts Payable	
A	10	ECM - Electronic Document Retention	Large	Hold	Q4 FY19	Information Services	
A	11	HSD Research Integrity	Medium	Pending	TBD	Faculty Administration	
A	12	Accounts Payable to Treacury/Cash Management - Forgein Invoices	Small	Pending	TBD	Accounts Payable	
	<b>13-22</b>	<b>Business Intelligence/Data Warehouse Program (10)</b>	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Enterprise/Multiple</b>	
A	13	Revenue to Expense Model - Phase 2	1	Large	Active	Q3 FY19	Finance-Office of VP-CFO
A	14	Leveraging the BI technology for Student Indebtedness	2	XLarge	Active	Q3 FY19	Finance-Office of VP-CFO
A	15	ILDS submission of Student Data	3	Large	Active	Q3 FY19	Institutional Research
A	16	New BI Dashboard for Bursar Reports	4	XLarge	Active	Q3 FY19	Office of The Bursar
A	17	Student Profile - Power BI	5	Large	Active	Q3 FY19	Student Development - Office of VP
A	18	ITS Dashboard - Area Metrics	6	Medium	Active	Q4 FY19	Information Technology Services
B	19	ITS Annual Summary Dashboard	7	Small	Active	Q3 FY19	Information Technology Services
B	20	KPI Requirements Gathering	8	Medium	Hold	TBD	Information Technology Services
A	21	Reports - BI Operational (8)	--	Large	Active	Q4 FY19	Information Technology Services
A	22	Reports - BI Projects (12)	--	XLarge	Active	Q4 FY19	Information Technology Services
	<b>23</b>	<b>LUHS/LUC/HSD Technology Program (1)</b>	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Information Technology Services</b>	
A	23	Migration of HSD/SSOM Desktops	XLarge	Active	Q3 FY19	Information Technology Services	

# FY19 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	<b>24-41</b>	<b>Information Security Program (16)</b>	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Enterprise/Multiple</b>
A	24	VPN Adjustments (remove 2-factor for email)	Small	Active	Q3 FY19	Information Technology Services
A	25	Data Transfer Consent	Small	Active	Q3 FY19	Information Technology Services
A	26	Security - Securing How-To Instructions Across the University	Medium	Active	Q3 FY19	Information Technology Services
A	27	Security Training - High Risk Areas	Medium	Active	Q3 FY19	Information Technology Services
A	28	ARMS 2018 Upgrades	Small	Active	Q3 FY19	Campus Safety LSC
A	29	Security - Phishing Execution & Assessment	Small	Active	Q4 FY19	Information Technology Services
A	30	2015 Security Assessment	Medium	Active	Q1 FY20	Information Technology Services
A	31	2017 Security Assessment	Medium	Active	Q4 FY19	Information Technology Services
A	32	2018 Security Assessment	Medium	Active	Q3 FY19	Information Technology Services
A	33	2019 Security Assessment	Medium	Pending	Q2 FY20	Information Technology Services
A	34	High Security Lab Environment/Security Operations Center	Medium	Pending	TBD	Information Technology Services
A	35	Broaden Use of SIEM Technologies	Large	Pending	Q4 FY19	Information Technology Services
A	36	HSC PII Program for 2019	XLarge	Pending	TBD	Information Technology Services
A	37	Lakeside PII Program 2019	XLarge	Pending	Q2 FY20	Information Technology Services
A	38	Loyola Aware Programming for 2019	XLarge	Pending	TBD	Information Technology Services
A	39	Cyber Security Awareness Monthly Events 2019	Medium	Pending	Q2 FY20	Information Technology Services
A	40	PCI-DSS Compliance Review 2019	Large	Pending	Q2 FY20	Information Technology Services
A	41	PCI-DSS Segmentation Testing 2019	Small	Pending	TBD	Information Technology Services
	<b>42-49</b>	<b>BCDR/Failover (8)</b>	<b>Large</b>	<b>Active</b>	<b>TBD</b>	<b>Enterprise/Multiple</b>
A	42	Disaster Recovery Planning	Large	Active	Q1 FY20	Information Technology Services
A	43	Network Disaster Recovery / Redundancy - LSC - Phase 1	Medium	Active	Q3 FY19	Information Technology Services
A	44	Disaster Recovery - Sakai	Small	Active	Q3 FY19	Information Technology Services
A	45	Disaster Recovery - Slate	Medium	Active	Q3 FY19	Information Technology Services
A	46	Disaster Recovery - TouchNet Paypath/TPG	Small	Active	Q3 FY19	Information Technology Services
A	47	Disaster Recovery - Zoom	Medium	Active	Q3 FY19	Information Technology Services
A	48	Disaster Recovery - Campus Safety Dispatch & Reporting (ARMS)	Medium	Active	Q3 FY19	Information Technology Services
A	49	Business Continuity for Departmental Staff	Large	Pending	TBD	Information Technology Services

# FY19 Q3-Q4 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	<b>50-60</b>	<b>Lawson/Kronos Enhancements (11)</b>	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Enterprise/Multiple</b>
A	50	Implement HSA, FSA and Dependent Care maintenance in Lawson	Medium	Active	Q3 FY19	Human Resources
A	51	Modifications to existing BCBS eligibility file program in Lawson for HDP	Small	Active	Q3 FY19	Human Resources
A	52	Modify Reliance Critical Illness & Accident Ins Census file Lawson Program	Small	Active	Q3 FY19	Human Resources
A	53	Modify Docfinity Lawson Interface for Multi Funded Invoices	Large	Active	Q3 FY19	Financial Systems
A	54	HR Benefits - Advisor Program	Medium	Pending	TBD	Human Resources
A	55	HR Benefits - Pharmacy Network	Large	Pending	TBD	Human Resources
A	56	Lawson Self Service Outside the Firewall	Medium	Pending	TBD	Office of The President
A	57	ESS Direct Deposit	Small	Pending	TBD	Human Resources
A	58	ESS Life Events - Benefits	Small	Pending	TBD	Human Resources
A	59	ESS Manager Drill down	Small	Pending	TBD	Human Resources
A	60	ESS Federal Tax Change	Small	Pending	TBD	Human Resources

Draft

# FY19 Q3-Q4 ITS Project Prioritization Worksheet

Draft

Priority	Row Nbr	Program Group	Draft ITESC Ranking	Prior ITESC Ranking	PRB Ranking	ATC Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
A	61	iPlan - Major Re-write	<b>1</b>	2	1	<i>Not Provided for Ranking</i>	Large	Active	Q4 FY19	Office of The Bursar
		<b>Advancement (2)</b>	<b>2</b>	1	2	Not Provided for Ranking	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Development &amp; Donor Services</b>
A	62	Advancement Data Loader Development					Large	Active	Q4 FY19	Development & Donor Services
A	63	Alumni/Giving Call Campaign Software Replacement					Medium	Active	Q3 FY19	Development & Donor Services
		<b>LDE Foundation: Collaboration and Security (5)</b>	<b>3</b>	---	3	<i>Not Provided for Ranking</i>	<b>XLarge</b>	<b>Active</b>	<b>Q2 FY21</b>	<b>Information Technology Services</b>
A	64	LDE Delivery Program					XLarge	Active	Q2 FY21	Information Technology Services
A	65	Exchange Online - Proof of Concept					Medium	Active	Q3 FY19	Information Technology Services
A	66	2 Factor Authentication					Medium	Active	Q3 FY19	Information Technology Services
A	67	Data Loss/Leakage Protection					XLarge	Active	Q4 FY19	Information Technology Services
M	68	Enterprise Mobility Management					Medium	Active	Q4 FY20	Information Technology Services
		<b>Space &amp; Asset Management (2)</b>	<b>4</b>	8	4	<i>Not Provided for Ranking</i>	<b>XLarge</b>	<b>Active</b>	<b>TBD</b>	<b>Facilities-Office of VP</b>
A	69	Space and Asset Management - System Search and Recommendation					Large	Active	Q3 FY19	Facilities-Office of VP
A	70	Space and Asset Management - Phase 1 Implementation					XLarge	Active	Q4 FY20	Facilities-Office of VP
A	71	LOCUS Fluid Page Rollouts	<b>5</b>	13	5	<i>Not Provided for Ranking</i>	XLarge	Active	Q2 FY20	Enterprise/Multiple
A	72	Secure Submission of W-9 Form for Accounts Payable Department	<b>6</b>	4	6	<i>Not Provided for Ranking</i>	Small	Active	Q3 FY19	Accounts Payable
A	73	Transition from On-Premise to Cloud for 25Live	<b>7</b>	7	7	<i>Not Provided for Ranking</i>	Large	Active	Q3 FY19	Campus Reservations
A	74	Sakai 12 Upgrade	<b>8</b>	---	8	1 (tie)	Medium	Active	Q1 FY20	Information Technology Services
A	75	Faculty Info System - Modifications for Collective Bargaining Agreement	<b>9</b>	---	9	<i>Not Provided for Ranking</i>	Medium	New	TBD	Faculty Administration
A	76	Preferred Name for Students - Discovery	<b>10</b>	---	15	<i>Not Provided for Ranking</i>	Large	New	TBD	Student Development - Office of VP

Draft

# FY19 Q3-Q4 ITS Project Prioritization Worksheet

Draft

Priority	Row Nbr	Program Group	Draft ITESC Ranking	Prior ITESC Ranking	PRB Ranking	ATC Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
A	77	Implement Proto-Call for After Hours Mental Health Services	<b>11</b>	---	10	<i>Not Provided for Ranking</i>	Small	New	TBD	Wellness Center
A	78	Provide Writing Placement infrastructure to support course placement	<b>12</b>	---	11	<i>Not Provided for Ranking</i>	Medium	Pending	Q4 FY19	Student Advising & Support
A	79	Academic Room Scheduling Interface Review	<b>13</b>	---	12 (tie)	<i>Not Provided for Ranking</i>	Medium	Active	Q3 FY19	Campus Reservations
A	80	Emergency Contact in RMS/Mercury using Person Flags	<b>14</b>	---	12 (tie)	<i>Not Provided for Ranking</i>	Small	Active	Q3 FY19	Residence Life
A	81	SONIA Field Management Software	<b>15</b>	9	14	<i>Not Provided for Ranking</i>	Medium	Active	Q3 FY19	School of Social Work
A	82	OIP Study Abroad Application via Slate	<b>16</b>	---	16	<i>Not Provided for Ranking</i>	Large	Active	Q4 FY19	Enterprise/Multiple
A	83	Course Evaluation Replacement Implementation	<b>17</b>	---	<i>Not Provided for Ranking</i>	1 (tie)	XLarge	New	Q1 FY20	Institutional Research
A	84	Judicial Affairs Systems Replacement (Maxient)	<b>18</b>	---	18	<i>Not Provided for Ranking</i>	Medium	Active	TBD	Student Development - Office of VP
A	85	RFP and Implementation of New Rambler Link Software	<b>19</b>	---	20	<i>Not Provided for Ranking</i>	Medium	New	TBD	Career Development Center
A	86	JFRC Assessment of Lake Side Technology for Badge Access and Dining Funds	<b>20</b>	---	21	<i>Not Provided for Ranking</i>	Small	Active	Q3 FY19	Rome Center - General
A	87	Mac OS Computer Management Application	<b>21</b>	---	17	<i>Not Provided for Ranking</i>	Large	Active	Q4 FY19	Its-Office Of The Vp & Cio
A	88	WebCheckout v4.6 to v4.9 upgrade	<b>22</b>	---	19	<i>Not Provided for Ranking</i>	Small	Active	Q3 FY19	Information Technology Services
A	89	Council of Regents Website Modifications	<b>23</b>	---	<i>Not Provided for Ranking</i>	<i>Not Provided for Ranking</i>	Medium	New	TBD	Office of the Chancellor
B	90	JIT Faculty Training for Online Teaching	<b>24</b>	---	<i>Not Provided for Ranking</i>	3	Medium	Active	Q3 FY19	Provost's Office / ITS
B	91	Follett Integration with Sakai	<b>25</b>	---	<i>Not Provided for Ranking</i>	4	Medium	New	Q4 FY19	Provost's Office

# 2019 ITESC Schedule

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**February 5, 2019 - Tuesday, 1:00-3:00 PM**

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**March 19, 2019 - Tuesday, 1:00-3:00 PM**

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**April 30, 2019 - Tuesday, 1:00-3:00 PM**

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**June 20, 2019 - Thursday, 1:00-3:00 PM**

- Project Portfolio Prioritization

**August 15, 2019 - Thursday, 1:00-3:00 PM**

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**October 1, 2019 - Tuesday, 1:00-3:00 PM**

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**December 12, 2019 - Thursday, 1:00-3:00 PM**

- Project Portfolio Prioritization

