

# Loyola University Chicago

## ITS Major Initiatives – FY22 Q3-Q4

|  |   |   |
|--|---|---|
| <p><b>Academic and Faculty Support</b></p> <ul style="list-style-type: none"> <li>• LOCUS Enhancements (2)</li> <li>• Customer Relationship Management Pilot for MNSON</li> <li>• Stritch School of Medicine Portfolio (8)</li> <li>• Review and Evaluate Proposed Research Administration Solutions</li> <li>• Faculty Administration Re-Architecture Strategy- FARS (8)</li> </ul> | <p><b>Administrative Initiatives</b></p> <ul style="list-style-type: none"> <li>• COVID-19 Related Projects (6)</li> <li>• Lawson/ Kronos Enhancements (1)</li> <li>• Space and Asset Mgmt System – Phase III (Archibus)</li> <li>• Automate HSC Parking/ ID processes</li> <li>• Data Governance &amp; Integrity</li> <li>• Alumni Giving &amp; Engagement (Graduway)</li> <li>• Commencement 2022 Survey</li> <li>• Financial Reporting Security (FRS)</li> <li>• Compliance Governance via Learning Hub</li> <li>• Course &amp; Curriculum Mgmt. (Courseleaf)</li> </ul> | <p><b>Student Technology Support</b></p> <ul style="list-style-type: none"> <li>• EAB Navigate Phase II</li> <li>• LDE Student Experience Lifecycle (PeopleGrove Mentoring: Main Hub, Sub Hubs for SSOM, SSW, Parkinson, MNSON)</li> <li>• Mental Health App for Students</li> <li>• Athletics Compliance System Replacement</li> <li>• Financial Aid Award Letter Processes – Aid Year 2023</li> </ul>   |
| <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>• Campus Construction Initiatives (8)</li> <li>• Information Security Program (3)</li> <li>• IT Disaster Recovery (5)</li> <li>• LDE Foundation: Collaboration and Security (2)</li> </ul>   | <p><b>Continuous Service Development</b></p> <ul style="list-style-type: none"> <li>• Advancement CRM RFP</li> <li>• LDE Transformation: Digital Assistant/ Chatbots (4)</li> <li>• LDE Consumable Experience (Portal Pilot)</li> <li>• Business Intelligence/ Data Warehouse (7)</li> <li>• Enterprise Content Management (4)</li> <li>• Learning Analytics – Phase 3</li> <li>• Travel Mgmt. Implementation (Egencia)</li> </ul>  | <p><b>Research Computing Services</b></p> <ul style="list-style-type: none"> <li>• Define Technology Services Supporting Research</li> <li>• Inclusion of electrocardiogram (ECG) waveforms in clinical repository</li> <li>• Use of ED note in Predictive Models for Admissions to CCU</li> <li>• ICR Research DB Server Replacement</li> <li>• CTSA/ITM Leaf Application Development and Testing</li> <li>• Innovations in clinical natural language processing (cNLP)</li> </ul> |



“Loyola Digital Experience”

## Table of Contents

|   |              |
|---|--------------|
| <b>ACADEMIC AND FACULTY SUPPORT .....</b>                                   | <b>3-4</b>   |
| LOCUS Enhancements (2).....   | 3            |
| LDE Consumable Experience: School-based CRM Slate Pilot for MNSON .....     | 3            |
| Stitch School of Medicine Portfolio (8) .....                               | 3            |
| Review and Evaluate Proposed Research Administration Solutions .....        | 3            |
| Digital Badging Solution .....  | 4            |
| Faculty Administration Re-Architecture Strategy–FARS (5).....               | 4            |
| <b>ADMINISTRATIVE INITIATIVES.....</b>                                      | <b>5-6</b>   |
| COVID-19 Related Projects (6) .....   | 5            |
| Lawson/Kronos Enhancements (1) .....  | 5            |
| Space and Asset Management – Phase III (Archibus) .....                     | 5            |
| Alumni Giving and Engagement (Graduway).....                                | 5            |
| Automate HSC Parking/ID processes .....                                     | 6            |
| Data Governance and Integrity .....   | 6            |
| Compliance Governance via the Learning Hub.....                             | 6            |
| Course Catalog and Curriculum Software (CourseLeaf).....                    | 6            |
| Financial Reporting Security (FRS).....                                     | 6            |
| <b>STUDENT TECHNOLOGY SUPPORT .....</b>                                     | <b>7-8</b>   |
| EAB Navigate Phase II.....  | 7            |
| LDE Student Experience Lifecycle: PeopleGrove Mentoring .....               | 7            |
| Athletics Compliance System Replacement.....                                | 7            |
| Financial Aid Award Letter Processes – Aid Year 2023.....                   | 8            |
| <b>INFRASTRUCTURE.....</b>  | <b>9</b>     |
| Campus Construction Initiatives (8) .....                                   | 9            |
| IT Disaster Recovery (5) .....  | 9            |
| LDE Foundation: Mobile Device Management (MDM).....                         | 9            |
| Information Security Program (3) .....                                      | 9            |
| <b>CONTINUOUS SERVICE DEVELOPMENT .....</b>                                 | <b>10-11</b> |
| Advancement CRM RFP .....   | 10           |
| LDE Transformation: Digital Assistant / Chatbots (4).....                   | 10           |
| Travel Mgmt. Implementation (Egencia) .....                                 | 10           |
| LDE Consumable Experience: ITS Portal Pilot .....                           | 10           |
| Business Intelligence / .....   | 11           |
| Data Warehouse (7) .....  | 11           |
| LDE Foundation: Identity and Access Management (IAM) Enhancements .....     | 11           |
| Enterprise Content Management (4).....                                      | 11           |
| <b>RESEARCH COMPUTING SERVICES.....</b>                                     | <b>12</b>    |
| Inclusion of electrocardiogram (ECG) waveforms in clinical repository ..... | 12           |
| Use of ED notes in Predictive Models for Admissions to CCU .....            | 12           |
| CTSA/ITM Leaf Application Development and Testing.....                      | 12           |
| Innovations in clinical natural language processing (cNLP).....             | 12           |

### Health Legend


|  |
|--|
| Green – On Target, No Risk                                       |
| Lime – On Target, Minimal Risk, Minor Concerns, Under Control    |
| Yellow – Target in Jeopardy, Risks Being Managed, Unknowns Exist |
| Orange – Slightly Off Target, Several Risks or Unknowns          |
| Red – Off Target, High Risk, Multiple Concerns                   |



Preparing people to lead extraordinary lives

## ACADEMIC AND FACULTY SUPPORT

| LOCUS Enhancements (2)   | Sponsor: Rita Vazquez, Robyn Mallett<br>Project Manager: Xiomara Franco, Dawn Fitzgerald | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <b>Institutional Impact:</b> Enhancements that improve service or increase efficiency for student and faculty services offered via the Student System (LOCUS).   |  |        |         |
| <b>Recent Activity:</b> 1) Completed Graduate Program and Enrollment Management Interface from SLATE to LOCUS to Assist with Withdraws and Deferrals. 2) Made enhancements to the Study Abroad Interface regarding bio-demo and academic data. 3) Completed Math Placement Exam Changes to Extend Testing Eligibility. 4) IPlan Phase III changes implemented. IPlan Phase IV changes in progress. |  |        |         |
| <b>Next Steps:</b> 1) GPEM Admissions interface (Phase 3 requirements gathering in progress). 2) COVID Immunization Module Display Only Status (In Progress). 3) Financial Aid Loans and Disbursements 2022. 4) Deployment of HighPoint CX (Campus Experience). 5) Auto Discontinuation of Program Plan Stack.   |  |        |         |

| LDE Consumable Experience: School-based CRM Slate Pilot for MNSON   | Sponsor: Karen Berg, Jennifer Boyle<br>Project Manager: Heather Chester |  | Health |         |
|---|---|---|--------|---------|
|   |   |   | Prior  | Current |
| <b>Institutional Impact:</b> MNSON and the Parkinson School are piloting a CRM for communication and data management with employers, research sites, students and other constituents. An enterprise CRM platform offers a consistent experience and creates a single platform with which the University can capture, share and report on participation and engagement. This is a pilot 'proof of concept' implementation of Slate's CRM module.   |   |   |        |         |
| <b>Recent Activity:</b> 1) Slate database setup completed. 2) ITS Training completed. 3) Vendor Kickoff was held on 4/29 with Underscore, Arrupe College, School of Nursing, and ITS. Held weekly vendor discussions to confirm fields needed for forms, workflows, reporting, internal process, and communications. 4) Identified all potential field values. Final data and field discussions targeting completion on 6/3. 5) Internal teams working on user roles and access levels, to help create separation of roles/responsibilities, and protect data access. |   |   |        |         |
| <b>Next Steps:</b> 1) Finalize data, fields, and field values being shared. 2) Confirm with the ITS Business Intelligence Manager all the sources of the data needed, and the best way to integrate or access the various types of data from the LUC source system. 3) Begin discussions around communication needs and the workflow of data and user interactions.   |   |   |        |         |

| Stitch School of Medicine Portfolio (8)   | Sponsor: Greg Gruener<br>Project Manager: Dawn Fitzgerald | Health |         |
|---|---|--------|---------|
|   |   | Prior  | Current |
| <b>Institutional Impact:</b> Provide technical project services to SSOM to enable process improvements and efficiencies.  |   |        |         |
| <b>Recent Activity:</b> Reviewed SSOM project portfolio in May. Completed projects: Patient Centered Medicine 4 for medical students, Mechanisms of Human disease online evaluation form, and Emergency Medicine Clerkship Performance Review. In Progress projects: Evaluation forms & workflow being updated for Patient Centered Medicine, SSOM Emergency Contact STARRS to LOCUS Interface and Integration of HSC Room Scheduler with 25Live. |   |        |         |
| <b>Next Steps:</b> 1) Continue active projects. 2) Begin data integration into data warehouse & create initial BI dashboards.   |   |        |         |

| Review and Evaluate Proposed Research Administration Solutions   | Sponsor: Dr. Sonny Singh<br>Project Manager: Jim Sibenaller | Health |         |
|--|---|--------|---------|
|  |   | Prior  | Current |
| <b>Institutional Impact:</b> A single Electronic Research Administration (ERA) system will increase efficiency, security and ease-of-use, as well as consolidate two legacy, custom-developed platforms that no longer meet our needs. |   |        |         |
| <b>Recent Activity:</b> Project kickoff is pending the SFPT approval of the XXL Transformational Capital Project Plan.   |   |        |         |
| <b>Next Steps:</b> 1) Determine project timing. 2) Identify the project manager. 3) Document the requirements; issue RFP.  |   |        |         |

## ACADEMIC AND FACULTY SUPPORT, cont'd

| Digital Badging Solution  | Sponsor: Robyn Mallett<br>Project Manager: Florence Yun | Health |         |
|---|---|--------|---------|
|   |   | Prior  | Current |
| <p><b>Institutional Impact:</b> Digital badges and micro-credentials are increasingly used to recognize non-degree professional development competencies. They provide evidence that learners can demonstrate specific skills. Digital badges/micro-credentials will increase the competitive value and recognition of non-degree based credentials offered by Loyola.</p>  |   |        |         |
| <p><b>Recent Activity:</b> 1) Presented to the Deans Council in May and received the Deans' support for the initiative. 2) Obtained green light from Provost to pilot with Executive and Professional Education Center (EPEC) for academic non-credit, and with OOL &amp; ITRS for faculty &amp; staff professional development. 3) Coordinating the scheduling of vendor demos for working group to evaluate products to select which product to pilot. 4) Working group meeting to work on pilot planning activities.</p> |   |        |         |
| <p><b>Next Steps:</b> 1) Hold vendor demos. 2) Provide the ITESC with an update from the May Deans Council meeting and the Provost's recommended approach to proceed. 3) Select product to pilot. 4) Complete pilot planning activities. 5) Kickoff pilot. 6) Conduct pilot assessment.</p>   |   |        |         |

| Faculty Administration Re-Architecture Strategy-FARS (5)   | Sponsor: Badia Ahad<br>Project Manager: Warren Francis | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <p><b>Institutional Impact:</b> Support One Loyola with a single Faculty review and administration system. This system will interact with all other third party systems and create a single method to interact with backend systems.</p>   |  |        |         |
| <p><b>Recent Activity:</b> 1) Performed troubleshooting on course &amp; faculty file upload logic. 2) Manually updated the F180 faculty roster to match the final DM roster. 3) Successfully loaded the DM historical course data. 4) Addressed several pending issues from data validation. 5) Identified the F180/RPT maintenance tasks for OIE completion.</p>                              |  |        |         |
| <p><b>Next Steps:</b> 1) Review pending data validation items. 2) OIE &amp; Faculty Admin to verify historical course data &amp; requested platform changes after re-load. 3) Train new OIE staff to support F180. 4) Bring faculty rosters up to date – coordinate with HSC, testing for Lakeside. 5) OIE to begin work on F180 annual evaluation CV template &amp; RPT template for CAS.</p> |  |        |         |

## ADMINISTRATIVE INITIATIVES

| COVID-19 Related Projects (6)  | Sponsor: Multiple<br>Project Manager: Multiple | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <b>Institutional Impact:</b> This group of projects is driven and prioritized by requirements to open campus, manage compliance, enable teaching, learning and working continuity, and automate business processes.  |  |        |         |
| <b>Recent Activity:</b> COVID-19 Emergency Response Management moved to normal campus operational status, includes: <ul style="list-style-type: none"> <li>• Loyola Health App updates</li> <li>• Business Intelligence Dashboard additions and Data Model enhancements</li> <li>• Booster Upload &amp; Exemption &amp; Testing Compliance</li> <li>• Random Surveillance Testing concluded with an overall 25% response rate</li> </ul> |  |        |         |
| <b>Next Steps:</b> Each project is being managed and reported to the appropriate stakeholders. Please contact ITS for specifics on any individual effort.  |  |        |         |

| Lawson/Kronos Enhancements (1)  | Sponsor: Danielle Hanson, Becky Gomez Klein<br>Project Manager: Mary Bunker | Health |         |
|---|---|--------|---------|
|   |   | Prior  | Current |
| <b>Institutional Impact:</b> Ongoing improvement projects for Enterprise resource planning (ERP) software which includes Budgeting and Planning, HR, Payroll, Accounting, Grant Management, Supply Chain and Expense Management.  |   |        |         |
| <b>Recent Activity:</b> 1) Developed employee feed for Egencia Travel Management project. 2) Completed testing for Total Compensation Statements and implemented in Lawson production environment. 3) Completed upgrades for Kronos production, Lawson production Ming.le, Lawson production Oracle database, and Document Self-Service. 4) Performed multiple Kronos system enhancements to improve performance and replace deprecated I-Rule in the F5 configuration. 5) Increased RAM for Lawson to provide increased performance for end of fiscal year processing. 6) Applied updates and configuration changes to remediate security vulnerabilities. |   |        |         |
| <b>Next Steps:</b> 1) Continue with fully automating the purging of job and report history in Lawson. 2) Develop automated process to import WorkBright data into the Lawson system for newly hired employees. 3) Sync the Lawson user security data between the Pre-Production and Production environments. 4) Reduce the size of the Ming.le database by disabling deprecated application services and removing redundant table data.   |   |        |         |

| Space and Asset Management – Phase III (Archibus)  | Sponsor: Kana Henning<br>Project Manager: Warren Francis | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <b>Institutional Impact:</b> Provide a real-time single source of truth for all space inventory and utilization data at LUC. The new system will become the planning tool for building programming, space assignments, and campus development. |  |        |         |
| <b>Recent Activity:</b> 1) The JLLT team is in progress with Phase 2: Utility Mgmt development tasks to be completed by June 14th. Once development is completed, the project team will progress to testing, training, and Go Live.            |  |        |         |
| <b>Next Steps:</b> 1) JLL to continue with training. 2) UAT testing for Phase 2 development. 3) Complete the project by the end of August.   |  |        |         |


| Alumni Giving and Engagement (Graduway)   | Sponsor: Megan Karwacki<br>Project Manager: Mary Bunker | Health |         |
|---|---|--------|---------|
|   |   | Prior  | Current |
| <b>Institutional Impact:</b> Increase ability to manage giving and engagement by partnering with Graduway in time for Giving Day. Graduway allows a simple process for alumni volunteer ambassadors to engage with their peers and adds gamification through the use of donor leaderboards and matching challenges. Reductions in reporting time are expected, allowing for final results to be shared nearly immediately at the close of a campaign. |   |        |         |
| <b>Recent Activity:</b> 1) Ramblers Raise campaign created as an extension of Rambler Rally to allow Development & Donor Services to crowdfund for University initiatives year-round. 2) Domain of ramblersraise.luc.edu set up by ITS for Ramblers Raise. 3) CNAME records and IP addresses whitelisted by ITS. 4) Testing complete.   |   |        |         |
| <b>Next Steps:</b> 1) Continue to support Graduway giving platform as required by Development and Donor Services.   |   |        |         |

## ADMINISTRATIVE INITIATIVES, cont'd

|   |  |        |          |
|---|--|--------|----------|
| Automate HSC Parking/ID processes   | Sponsor: Annie McCormack<br>Project Manager: Ashley Walcott  | Health |          |
|   |  | Prior  | Current  |
| <b>Institutional Impact:</b> Changes to Trinity systems (Workday) require a change in processing to automate HSC student/faculty/staff IDs/Parking permits. This impacts MNSON, SSOM, and Parkinson.  |  |        |          |
| <b>Recent Activity:</b> 1) ITS engaging with colleagues in HSC schools/departments to understand how they use the “non-colleague Workday accounts” report distributed by LUMC Payroll and any potential changes to the report to improve business processes.  |  |        |          |
| <b>Next Steps:</b> 1) Collaborate with partners from Stritch, Parkinson, Faculty Admin, and HR re: improvements to non-colleague accounts report. 2) Submit requested changes to report to LUMC Payroll.  |  |        |          |
| Data Governance and Integrity   | Sponsor: Susan Malisch, Winifred Williams, Teresa Krafcisin, Margaret Callahan<br>Project Manager: Tony Vavarutsos | Health |          |
|   |  | Prior  | Current  |
| <b>Institutional Impact:</b> This project will address data integrity issues that exist within and across systems. Data needs to be validated and controlled so that sources of truth are defined and obvious. Good, clean data will enhance the ability to service students more effectively and enable efficient operations.  |  |        |          |
| <b>Recent Activity:</b> 1) Formally launched DGISC Committee and held first meeting in April. 2) Finalized Charter from working version and created Committee website. 3) Created data dictionary best practices and continued expanding entries. 4) Conducted first review meeting with executive sponsors.  |  |        |          |
| <b>Next Steps:</b> 1) Hold second Committee meeting in June. 2) Train and provide access to the internal data dictionary. 3) Complete vendor vetting for a Data Cookbook solution. 4) Continue working on the solution for student/faculty/staff mobile phone numbers and student local address. 5) Interview committee members on data challenges and successes.   |  |        |          |
| Compliance Governance via the Learning Hub  | Sponsor: Teresa Krafcisin<br>Project Manager: Warren Francis   | Health |          |
|   |  | Prior  | Current  |
| <b>Institutional Impact:</b> Provide a portal to monitor Federal compliance requirements at an institutional level and also to generate a robust report from Risk Matrix standpoint that will identify areas at risk or concern.  |  |        |          |
| <b>Recent Activity:</b> 1) Additional enhancements identified to the system based on UAT testing. 2) Additional enhancements development completed and are now being tested.  |  |        |          |
| <b>Next Steps:</b> 1) Complete the additional sponsor enhancements by June 17. 2) Complete UAT target go live by the end of June.   |  |        |          |
| Course Catalog and Curriculum Software (CourseLeaf)   | Sponsor: Robyn Mallett<br>Project Manager: Ashley Walcott  | Health |          |
|   |  | Prior  | Current  |
| <b>Institutional Impact.</b> This solution enables LUC to create a university-wide catalog (for course offerings, degree/program requirements, learning outcomes, and academic policies for all or most schools) that is updated, published, and archived on a regular schedule. Additionally, it provides a platform for electronic curriculum review/approval workflow that retains a full history of changes that are tracked, eliminating the use of paper/pdf forms. |  |        |          |
| <b>Recent Activity:</b> 1) Contract finalized and signed. 2) Team completed vendor’s Project Charter document and returned it to vendor. 3) Awaiting next steps from vendor regarding scheduling project kickoff.   |  |        |          |
| <b>Next Steps:</b> 1) Schedule project kickoff.   |  |        |          |
| Financial Reporting Security (FRS)  | Sponsor: Rebecca Gomez Klein<br>Project Manager: Jocelyn Ong   | Health |          |
|   |  | Prior  | Complete |
| <b>Institutional Impact:</b> Combining multiple security tables into a single database will help Finance maintain consistent reporting and accessibility across departments, and it will streamline maintenance.  |  |        |          |
| <b>Recent Activity:</b> 1) The team completed development and provided a demo of the system to the client. 2) Production data is being copied into the development environment so the client can start user acceptance testing.   |  |        |          |
| <b>Next Steps:</b> 1) The clients signed off on the application testing, the team deployed the changes in prod on Apr 1. The project is now complete.   |  |        |          |

## STUDENT TECHNOLOGY SUPPORT

| EAB Navigate Phase II  | Sponsor: Paul Roberts<br>Project Manager: Ashley Walcott | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <b>Institutional Impact:</b> Navigate is a student success platform that enhances communications between advisor and student and provides tools for academic planning. Later phases may allow direct enrollment from Navigate into LOCUS.  |  |        |         |
| <b>Recent Activity:</b> 1) One-Click Registration – Team conducted a pilot for Fall 2022 registration in April; positive feedback from students, some issues reported. EAB has not provided referrals to current Peoplesoft Campus Solutions customers with One-Click registration in use. We are escalating with them and will explore other options. 2) Advising Notes Interface to LOCUS – In progress, vendor investigating issues with PeopleSoft Integration Broker. 3) Arrupe College – In progress; vendor has loaded Arrupe student data into our test environment; ready for UAT with Arrupe staff. 4) Academic Progress Reports – ITS assisted with documenting current business process with existing systems; SAS to develop formal proposal for implementation of academic progress reporting in Navigate. |  |        |         |
| <b>Utilization Metrics – FY22 Q4 (4/1/22-6/6/22):</b>  |  |        |         |
| <ul style="list-style-type: none"> <li>• 6,188 advising notes entered into Navigate</li> <li>• 2,051 communications sent from within Navigate, including:               <ul style="list-style-type: none"> <li>○ 1,908 emails sent to 1,218 students</li> <li>○ 143 text messages sent to 94 students</li> </ul> </li> <li>• 2,511 appointments scheduled from within Navigate</li> <li>• 2,691 unique students logged into the Navigate Student platform</li> </ul>   |  |        |         |
| <b>Next Steps:</b> 1) One-Click Registration – Work with EAB to resolve issues identified during April pilot and ways to conduct load testing ahead of next registration cycle. 2) Arrupe College – Complete UAT and deploy to production. 3) Complete technical work on Advising Notes interface. 4) Present proposal for new Navigate-based Academic Progress Reporting process to stakeholders and plan implementation.   |  |        |         |

| LDE Student Experience Lifecycle:<br>PeopleGrove Mentoring   | Sponsor: Paul Roberts, Karen PACEIRO, Susan Malisch<br>Project Manager: Ashley Walcott |  | Health |         |
|--|--|--|--------|---------|
|  |  |  | Prior  | Current |
| <b>Institutional Impact:</b> An enterprise-wide solution for managing various mentoring programs ensures consistent user experiences for mentors and mentees, facilitates opportunities for mentoring across disciplines, and improves engagement, educational and professional outcomes for students, alumni, faculty, and staff.   |  |  |        |         |
| <b>Recent Activity:</b> 1) LoyolaLinked (Central Hub) rollout on hold. Functional leads presented proposals to leadership and SFPT for full-time resources to support LoyolaLinked central administration and programming – proposal approved. 2) Stritch School of Medicine hub initiated its wide launch to alumni in April; preparing for wide launch to students. 3) School of Social Work hub two-week implementation completed in April; ready for soft launch pending successful load of alumni user data. 4) Parkinson School of Health Sciences and Public Health hub two-week implementation completed in May; working on additional site configurations and preparing user list for soft launch in late June. |  |  |        |         |
| <b>Next Steps:</b> 1) Finalize and post job requisitions. Conduct Social Work and Parkinson hub soft launches. 2) Plan for wide rollout of Central, Stritch, Social Work, and Parkinson hubs. 3) Purchase additional hub licenses in FY23 and begin reaching out to the next schools and colleges in the queue to plan hub implementations.  |  |  |        |         |

| Athletics Compliance System<br>Replacement   | Sponsor: Steve Watson<br>Project Manager: Xiomara Franco | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <b>Institutional Impact:</b> Enhance the current workflows and processes within Athletics while ensuring compliance with the NCAA for all sports programs and athletes. Replace JumpForward with ARMS. |  |        |         |
| <b>Recent Activity:</b> SSO was established and enabled for the application.   |  |        |         |
| <b>Next Steps:</b> Close Project.  |  |        |         |

## STUDENT TECHNOLOGY SUPPORT, cont'd

| Financial Aid Award Letter Processes – Aid Year 2023  | Sponsor: Paul Roberts<br>Project Manager: Caroline Mwangi, Ivan Siap | Health |         |
|---|--|--------|---------|
|   |  | Prior  | Current |
| <p><b>Institutional Impact:</b> Each Financial Aid Awarding year, Financial Aid office has a set of recurrent operations that are used to process continuing and incoming students data. These processes include ISIR loads, related checklist processing, packaging, and award letters. The group of custom batch programs, which help to facilitate Award letter processing, are known at Loyola as the "Starting Line Up." These ensure that implemented changes are well understood, tested, and accounted for in our institution's processing logic, and in the various external data interfaces.</p>  |  |        |         |
| <p><b>Recent Activity:</b> 1) Support for HEERF4 (Higher Education Emergency Relief Fund) processing. Created, tested, and provided analysis of LOCUS VIEW of HEERF4-eligible students for processing. 2) FAPKGCMP (Packaging of Rating Components) process support. This customized baseline process was debugged, a workaround identified, developed, tested &amp; implemented. A long-term solution was also identified and is currently awaiting UAT sign-off. 3) Revisions for existing Navigation Collections and addition of 2023 Aid Year. Navigation collections provide groupings of Financial Aid contents stored in the portal registry. 4) Testing, &amp; assistance in installation of Federal Regulatory releases (PRP) and associated customizations (FA5B&amp;C Verification edits, FA9E COD Loans); State Grants (FA12 Illinois MAP Grant); and Institutional Grants (Returning Ramblers, GRAD Discount).</p> |  |        |         |
| <p><b>Next Steps:</b> Continue to monitor the performance of the various award Letter processes.</p>  |  |        |         |




## INFRASTRUCTURE

|   |   |        |         |
|---|---|--------|---------|
| Campus Construction Initiatives(8)  | Sponsor: Kana Henning<br>Project Manager: Various NIS Staff | Health |         |
|   |   | Prior  | Current |
| <b>Institutional Impact:</b> Ensure planning, oversight & installation of appropriate technology for LUC construction projects.   |   |        |         |
| <b>Recent Activity:</b> 1) The roots Health Bar initiative has been cancelled. 2) Construction has started for the Campus Safety office and Cuneo building entrance at HSC. 3) Construction has started for the Medical teach lab (MLS) at HSC. |   |        |         |
| <b>Next Steps:</b> Serve as technology resource on above projects and activate network connections and configure technology for each project at appropriate times.  |   |        |         |

|   |   |        |         |
|---|---|--------|---------|
| Information Security Program (3)  | Sponsor: Susan Malisch<br>Project Manager: Jim Pardonek | Health |         |
|   |   | Prior  | Current |
| <b>Institutional Impact:</b> Continue risk mitigation and management associated with the confidentiality, integrity and availability of University protected and sensitive information.   |   |        |         |
| <b>Recent Activity:</b><br><u>Awareness</u> – The Fall 2021 General Security Awareness training completed with an 88% completion rate. Spring 2022 awareness training completed with an 86% completion rate. Researching training for students and preparing training for Fall 2022. Phishing training for all faculty and staff continues. Reviewing additional training for "high risk" departments and for students. Ongoing content delivered to all faculty/staff/students to reinforce security awareness due to current international climate.<br><u>Compliance</u> – The 2022 PCI-DSS compliance effort continues. Annual penetration testing applications identified and set to begin in June. HIPAA gap assessment underway. Review of roles and permissions for ITS internal systems completed.<br><u>Risk Reduction</u> – 3 <sup>rd</sup> party risk assessment treatments have been prioritized and the application of treatments is in progress, specifically server scanning and vulnerability remediations. Policy reviews for streamlining and consistency continues. Endpoint Detection and Response (EDR) solution evaluation underway. 3 <sup>rd</sup> party security performance management application being implemented. |   |        |         |
| <b>Next Steps:</b> 1) Ongoing security awareness and phishing assessments. 2) Continue server hardening and PII Program. 3) Promote Last Pass. 4) Implement Risk Assessment treatments.   |   |        |         |

|  |   |        |         |
|--|---|--------|---------|
| IT Disaster Recovery (5)   | Sponsor: Margaret Callahan, Tom Kelly, Susan Malisch<br>Project Manager: Jim Sibenaller | Health |         |
|  |   | Prior  | Current |
| <b>Institutional Impact:</b> Timely restoration of key University technology services in the event of disaster or severe outage.                     |   |        |         |
| <b>Recent Activity:</b> The DR program for 2022 will be deferred until after the annual Deloitte audit of financial systems. Likely start July 2022. |   |        |         |
| <b>Next Steps:</b> 1) Establish current state of the program. 2) Launch 2022 review process. 3) Test all systems/applications.                       |   |        |         |


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|---|---|---|--------|----------|
| LDE Foundation: Mobile Device Management (MDM)  | Sponsor: Susan Malisch<br>Project Manager: Jim Sibenaller, Dan Vonder Heide |  | Health |          |
|   |   |   | Prior  | Complete |
| <b>Institutional Impact:</b> Strengthen information security and collaboration tools related to the use of mobile devices to access LUC electronic resources and data.  |   |   |        |          |
| <b>Recent Activity:</b> Presented to the ITESC the research gathered from the MDM pilot. There was agreement from the committee that the low adoption rate of MDM within higher-ed, the restriction of features, and the instability of the product outweighs the benefits at this point. It was agreed that ITS will monitor as the technology in this area continues to mature and more institutions start to deploy MDM. |   |   |        |          |
| <b>Next Steps:</b> Close project. ITS will continue to monitor the product landscape and evaluate future tools.   |   |   |        |          |

## CONTINUOUS SERVICE DEVELOPMENT

|  |  |                  |
|--|--|------------------|
| Advancement CRM RFP  | Sponsor: Susan Malisch, Karen Paciero<br>Project Manager: Florence Yun | Health           |
|  |  | Prior    Current |
| <p><b>Institutional Impact:</b> Zuri Group is leading an RFP process coordinated between ITS and Advancement. A new system will provide contemporary functionality and enhanced relationships with the Loyola Alumni community. The new system will also help Advancement as they prepare for a new capital campaign.</p>  |  |                  |
| <p><b>Recent Activity:</b> Reviewed RFP responses from solution providers to select top three invited to present to Loyola. Completed vendor demos in May and circulated survey to collect participants' feedback. Met with Executive Committee to provide updates. Scorecard Analysis underway to identify top choice system by end of June.</p>  |  |                  |
| <p><b>Next Steps:</b> 1) Complete scorecard analysis. 2) Identify top choice system. 3) Present recommendation to ARB and ITESC for approval to begin contract negotiations. 4) Finalize contract. 5) Kick-off Implementation planning.</p>  |  |                  |
| LDE Transformation: Digital Assistant / Chatbots (4)   | Sponsor: Susan Malisch<br>Project Manager: Kelly Pearce                | Health           |
|  |  | Prior    Current |
| <p><b>Institutional Impact:</b> Increase administrative efficiencies and improve service to students, faculty and staff using Digital Assistants or "Chatbots". Answers to most frequently asked questions are self-service &amp; available 24/7.</p>  |  |                  |
| <p><b>Recent Activity:</b> Presented with IntraSee at the March HEUG conference. Continue to work on extending the executive summary reporting effort with IntraSee. Departments engaged in initial Content and Rating Governance discussion to explain the involvement that will be required of functional users as we continue. Training on Content and Rating process with departments in progress. Completed upgrade to current release 22.01.</p>   |  |                  |
| <p><b>Utilization Metrics:</b></p> <ul style="list-style-type: none"> <li>• Growth rate 29%, from 12,228 conversations in Q3 FY22 to 15,739 conversations in Q4 FY22</li> <li>• Q4 FY22 - Users mainly access the Chatbot (LUie) from LOCUS (32.4%), luc.edu (25.9%), ResLife (13.9%), Bursar (12.5%) and Health &amp; Wellbeing (12.3%).</li> <li>• With over 667 questions across a variety of topics, the most popular content areas in 2022 have been Residence Life, My Information and Academics.</li> <li>• Unique Events Time of Day: 67% of the events took place between 8am &amp; 8pm with 2pm being the highest percentage at 8.7%.</li> </ul> |  |                  |
| <p><b>Next Steps:</b> 1) Continue reporting effort with IntraSee for the development of executive summary updates. 2) Promote expansion of ChatBot to other business partners. 3) Continue testing the Thumbs Up and Thumbs Down feedback feature, which should be visible by all users. 4) Deploy to a Broader Student Population in LOCUS (currently only rolled out in LOCUS to UGRD Students).</p>   |  |                  |
| LDE Consumable Experience: ITS Portal Pilot  | Sponsor: Jim Sibenaller<br>Project Manager: Kelly Pearce               | Health           |
|  |  | Prior    Current |
| <p><b>Institutional Impact:</b> This pilot is expected to validate features and functionality for a Loyola-wide portal experience, where content is tailored to each student, faculty, or staff.</p>   |  |                  |
| <p><b>Recent Activity:</b> Team reviewed the existing technology landscape and selected two vendors (Akumina and Jahia) for demo purposes. Based on demonstrations the team has chosen Jahia to pilot and validate the portal features and functionalities. Requirements and use cases are being formulated to validate the portal features and functionalities.</p>   |  |                  |
| <p><b>Next Steps:</b> 1) Finalize licensing for the pilot period. 2) Engage the ITS Portal Functional User Group for initial requirements discussion and alignment with needs.</p>   |  |                  |
| Travel Mgmt. Implementation (Egencia)  | Sponsor: Teresa Krafcisin<br>Project Manager: Mary Bunker              | Health           |
|  |  | Prior    Current |
| <p><b>Institutional Impact:</b> Improve travel management costs and provide travelers with professional service by dedicated agents. By integrating the travel management with LUC Financial systems University will improve accounting and purchasing processes related to travel.</p>  |  |                  |
| <p><b>Recent Activity:</b> 1) Changes were made to the selection criteria on the Egencia HR Feed per Finance's request. The changes will affect the new hires and terminations being selected.</p>   |  |                  |
| <p><b>Next Steps:</b> Close Project.</p>   |  |                  |

## CONTINUOUS SERVICE DEVELOPMENT, cont'd

| Business Intelligence /<br>Data Warehouse (7)   | Sponsor: Margaret Callahan, Wayne Magdziarz, Susan Malisch<br>Project Manager: Tony Vavarutos | Health |         |
|---|---|--------|---------|
|   |   | Prior  | Current |
| <b>Institutional Impact:</b> Inform planning and strategic decisions at Loyola with new visualizations, reporting and data analyses using enterprise data that is more easily accessible and consumable.  |   |        |         |
| <b>Recent Activity:</b>   |   |        |         |
| <ul style="list-style-type: none"> <li>• Developed new Fall 2022 and Summer 2022 daily registrations dashboards.</li> <li>• Specific to incoming class of Fall 2022, the following Power BI data models were created:               <ul style="list-style-type: none"> <li>○ Loyola Incoming Students Orientation – Advising team</li> <li>○ YoY Spring to Fall enrollment by day – Enrollment Management</li> </ul> </li> <li>• Started the Unified Research Dashboard project to consolidate HSC &amp; LSC data sources into a single repository.</li> <li>• Continued the development of Phase 3 of the LMS Learning Analytics initiative, during which LMS data models are developed to be consumed by the Provost Office, Deans, Program Heads and other Academic Leadership. Presented the data model at the 2022 AJCU CITM conference (along with LMU).</li> <li>• Developed numerous data interfaces for Advancement events and for the new F180 faculty system.</li> <li>• Started development of HR Metrics data model as guided by HR.</li> <li>• Re-engaged with HSC staff to pull the SSOM applications, registration and academic data into Data Warehouse.</li> <li>• Developed 6 Power BI reports and dashboards consumed by the Provost Office, OIE and other Academic Units.</li> </ul> |   |        |         |
| <b>Next Steps:</b> 1) Continue support of Covid and Booster testing and issues related with testing and compliancy. 2) Complete the HR Metrics data model. 3) Complete Phase 3 Learning Analytics framework. 4) Continue projects by which we pull SSOM applications, registration and academic data into our EDW. 5) Launch the WebFOCUS report conversion project and initiate training on the new tool.  |   |        |         |

| LDE Foundation: Identity and Access<br>Management (IAM) Enhancements  | Sponsor: Susan Malisch<br>Project Manager: Jeffrey Apa |  | Health |         |
|---|--|---|--------|---------|
|   |  |   | Prior  | Current |
| <b>Institutional Impact:</b> Improvements to Loyola's IAM System are required to expand automated access management to applications and services across the environment. As roles within the University change and evolve, our IAM system should transition a person's access with minimal administrative intervention and without disruption. Once complete, application access will automatically transition as an individual's role changes, minimizing unauthorized access risk and improving productivity. |  |   |        |         |
| <b>Recent Activity:</b> 1) Met with 17 campus partners across the University to discuss project goals and solicit feedback on current identity processes and pain points. 2) Transitioned project management to new Senior Project Manager in ITS.  |  |   |        |         |
| <b>Next Steps:</b> 1) Complete RFP and distribute final version to vendors. 2) Present recommendation to Architecture Review Board.   |  |   |        |         |

| Enterprise Content Management (4)  | Sponsor: Susan Malisch<br>Project Manager: Mary Bunker | Health |         |
|--|--|--------|---------|
|  |  | Prior  | Current |
| <b>Institutional Impact:</b> Improve/streamline student services & interdepartmental process efficiency while reducing paper.  |  |        |         |
| <b>Recent Activity:</b> 1) Completed projects: DocFinity Upgrade to 11.11.3. 2) Active projects include: Wellness Center – COVID 19 Immunizations, Repository for Storing and Accessing Grant Related Documentation for ORS, Workbright/Lawson/DocFinity API.                        |  |        |         |
| <b>Next Steps:</b> 1) Obtain User Acceptance Testing sign-off on active projects. 2) Finalize projects in QA environment to move them into Production. 3) Review ECM project requests and set priorities on new projects. 4) Implement process to purge deleted documents regularly. |  |        |         |

## RESEARCH COMPUTING SERVICES

|   |  |         |
|---|--|---------|
| Inclusion of electrocardiogram (ECG) waveforms in clinical repository   | Principle Investigator: Dr. Kathy Bobay (PARKS)<br>Assigned: Steven Birch                | Health  |
|   |  | Prior   |
|   |  | Current |
| <p><b>Institutional Impact:</b> This project significantly expands the range of clinical data that will be available to clinical researchers. Electrocardiogram (ECG or EKG) data are traditionally difficult to acquire and analyze as they are often stored in quasi-proprietary vendor formats. A collaboration of Parkinson Health Informatics faculty and the ITS Informatics and Clinical Research (ICR) team led to development of process that can be utilized to perform large-scale analysis of these data. This resource allows researchers to be more competitive in some research funding processes.</p>   |  |         |
| <p><b>Recent Activity:</b> 1) Completed transfer of 2.6M historic ECG files covering three decades of studies. Largest available ECG research data repository as determined via recent literature review. 2) Analysis of all ECG files complete. 3) De-identified ECG data integrated into the Clinical Research Database (CRDB) and now available for use.</p>   |  |         |
| <p><b>Next Steps:</b> 1) Move load and processing of new ECG files to an on-going operational process. 2) Work with Drs. Bobay and Akbilgic to communicate availability of this new data resource to clinical researchers.</p>  |  |         |
| Use of ED notes in Predictive Models for Admissions to CCU  | Principle Investigator: Drs. S. Tootooni, K.Bobay (PARKS)<br>Assigned: Various ICR staff | Health  |
|   |  | Prior   |
|   |  | Current |
| <p><b>Institutional Impact:</b> This project utilizes cNAE/cNIE technologies (or traditional NLP technologies) in the assessment of Emergency Department (ED) "chief complaints" for use in models that predict admissions to critical care units. Project goals are (in no specific order): 1) Map ED chief complaints from free text to a structured table. 2) Assess use of cNAE/cNIE technologies in development and implementation of real-time predictive clinical models. 3) Develop model(s) for early prediction of admission to ICU using structured and unstructured (chief complaint) ED data.</p>  |  |         |
| <p><b>Recent Activity:</b> 1) Research team reviewed cNAE/cNIE for use in concept mapping of targeted ED chief complaints. 2) Identified need to concept map ED chief complaints to a controlled vocabulary of ~130 pre-determined terms.</p>   |  |         |
| <p><b>Next Steps:</b> 1) Meet to review 130 term target concept list. 2) Formulate plan to extract targeted sample ED notes for manual annotation to develop a prototype cNAE knowledge map (KM). 3) Perform testing to evaluate prototype.</p>   |  |         |
| Innovations in clinical natural language processing (cNLP)  | Principle Investigator: Dr. Kathy Bobay<br>Assigned: Ron Price, Jason Boyda              | Health  |
|   |  | Prior   |
|   |  | Current |
| <p><b>Institutional Impact:</b> Electronic health record (EHR) narrative notes contain rich data about patient care and comprise approximately 80% of the EHR's content. These data are difficult to access and analyze without tedious and costly manual chart reviews. These new clinical natural language processing (cNLP) and clinical inference engines eliminate the barriers of previous cNLP products, namely the lack of near real-time performance and the need for extensive hardware and technical expertise. These innovations can be used in real-time, and in a wide range of use cases:</p> <ol style="list-style-type: none"> <li>1. Clinical Natural Language Processing Analytics Engine (cNAE)</li> <li>2. Clinical Natural Language Processing Inference Engine (cNIE)</li> </ol> |  |         |
| <p><b>Recent Activity:</b> 1) Completed graphical user interface (GUI) "toolbox" application with cNAE, cNIE, Concept Mapper and RuleBuilder components. 2) Performed a 4-hr cNAE/cNIE workshop (67 participants) at the national AMIA 2022 Clinical Informatics Meeting in Houston on May 24<sup>th</sup>, 2022. 3) Had two initial discussions on software licensing models.</p>  |  |         |
| <p><b>Next Steps:</b> 1) Continue work with ORS/Technology Transfer on future licensing strategies and opportunities. 2) Work with Drs. Oosterhouse and Bobay to develop an automated clinical inference rule analysis application. Analysis application will allow clinical researcher to quickly assess the performance (e.g., precision, recall, sensitivity, F-score, etc.) of developed clinical rules. 3) Add GUI "toolbox" application to RCS website; make available to research faculty.</p>   |  |         |
| CTSA/ITM Leaf Application Development and Testing   | Principle Investigator: Dr. Kathy Bobay (PARKS)<br>Assigned: Ron Price, Steven Birch     | Health  |
|   |  | Prior   |
|   |  | Current |
| <p><b>Institutional Impact:</b> On-going effort funded via a CTSA award through the Univ. of Chicago's Institution for Translational Medicine (ITM). The goal is to create an OMOP-based clinical data repository that can be accessed via an open-source patient cohort discovery tool (LEAF) developed by the University of Washington. The LEAF application operates in a "federated" manner allowing researchers across the ITM to discover patient cohorts across participating institutions. Beyond Loyola, current ITM participating institutions include the Univ. of Chicago and RUSH. LEAF data will be fully de-identified and is not expected to be operational before sometime late in CY2022.</p>   |  |         |
| <p><b>Recent Activity:</b> 1) LUC completed initial review of ITM MOU (data sharing) agreement and returned new "redlines" to University of Chicago Legal for review and feedback. 2) Continued intermittent Informatics workgroup meetings.</p>  |  |         |
| <p><b>Next Steps:</b> 1) Continued ITM Informatic/LEAF workgroup meetings. 2) Support completion of MOU. 3) Work with ORS/IRB to define LEAF users who can perform cross-institution, federated queries. 4) Develop process to implement federated users in LEAF. 5) Review grant renewal budgeting for on-going LEAF activities.</p>   |  |         |