

ITS Executive Steering Committee (ITESC)

Agenda and Materials – January 26, 2017



Agenda

ITS Project Portfolio Prioritization - Results

- S. Malisch, J. Sibenaller

Advancement Upgrade

- M. Halverson, J. Sibenaller

Student System Upgrade

- C. Korinek, K. Smith

Phone System Upgrade

- D. Vonder Heide

Document Management/ECM Upgrade

- J. Sibenaller

FY17 Q3-Q4 Prioritization Results

Action	Project	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer	Consensus Ranking
R A N K E D	LOCUS Enhancements (6)	XLarge	Active	TBD	Enterprise/Multiple	Established Initiative
	Enterprise Content Management (6)	XLarge	Active	TBD	Enterprise/Multiple	
	Business Intelligence/Data Warehouse Program (3)	XLarge	Active	Q3 FY17	Information Technology Services	
	LUHS/LUC/HSD Technology Program (3)	XLarge	Active	Q2 FY18	HSD/ Information Technology Services	
	Information Security Program (8)	XLarge	Active	TBD	Information Technology Services	
	Business Continuity/Disaster Recovery (12)	XLarge	On Hold	TBD	Information Technology Services	
	Lawson/Kronos Enhancements (3)	XLarge	Active	Q3 FY17	Enterprise/Multiple	
R A N K E D B Y T H E I T E S C	Student System Upgrade (7)	XLarge	Pending	Q2 FY18	Registration & Records	1
	LOCUS upgrade (CS 9.2 & PT 8.55) - Phase I	Large	Pending	Q2 FY18	Registration & Records	
	LOCUS Upgrade - CS PeopleTools 8.55 Upgrade	XLarge	Pending	Q2 FY18	Registration & Records	
	LOCUS Upgrade -iHub (Portal) PeopleTools 8.55 Upgrade	XLarge	Pending	Q2 FY18	Registration & Records	
	LOCUS Upgrade-- Search Engine Upgrade- Elasticsearch	XLarge	Pending	Q2 FY18	Registration & Records	
	LOCUS Upgrade--CS 9.2 Database and Application Upgrade	XLarge	Pending	Q2 FY18	Registration & Records	
	LOCUS Upgrade- Decoupling Application and PeopleTools Software	XLarge	Pending	Q2 FY18	Registration & Records	
	LOCUS Upgrade - Evaluate Change Management and Testing Tools	XLarge	Pending	Q2 FY18	Registration & Records	
	Advancement (4)	XLarge	Active	TBD	Development & Donor Services	2
	Advance Upgrade Program	XLarge	Active	Q4 FY17	Development & Donor Services	
	Advancement - Data Loader	Medium	Active	Q1 FY18	Development & Donor Services	
	Alumni/Giving Call Campaign Software Replacement	Medium	Active	Q1 FY18	Development & Donor Services	
	Advancement Report Conversion	Large	Pending	TBD	Development & Donor Services	3
	12C Database Upgrade (Required for PS Upgrade)	XLarge	Active	Q3 FY17	Information Services	
	Online Performance Management System (2)	XLarge	Active	TBD	Human Resources	4
	Online Performance Management System - Phase 1	Large	Active	Q3 FY17	Human Resources	
Online Performance Management System - Phase 2	Large	Pending	TBD	Human Resources		
Access Control & Security - Maxxess (2)	XLarge	Pending	TBD	Enterprise/Multiple	5	
Maxxess - Secondary Access Level Web Application	XLarge	Pending	TBD	Human Resources:Office of VP		
Maxxess - Security Log Interface	Large	Pending	TBD	Campus Safety LSC		
Online Exam Proctoring Solutions - Pilot	Large	On Hold	Q1 FY18	Provost's Office	6	
Phone System Replacement - Phase 3	XLarge	Active	Q4 FY17	Information Services	7	
LCFS Technology Needs for EMR, HIPAA, and PCI	Medium	Active	Q3 FY17	Loyola Community and Family Services	8	
Sakai 11 Upgrade	Large	Active	Q4 FY17	Information Services	9	
Hybrid On-line Nursing Program with Orbis	Small	Pending	TBD	Niehoff School of Nursing	10	
Evaluation of Event Management Systems	Large	Active	Q4 FY17	Alumni Relations	11	
Faculty Information System Suite Enhancements	Medium	Active	TBD	Provost's Office	12	
Secure Communications for ePHI	Large	Pending	TBD	Provost HSD	13	
Evaluate Vendors to Host the Athletic Department's Website	Small	Pending	TBD	Athletics	14	
Compliance Tracking for Various Initiatives	Large	Pending	Q4 FY17	Enterprise/Multiple	15	
ITS Help Desk to Service Desk	Large	Active	Q3 FY17	Information Services	16	

ITS Major Initiatives Calendar

ITS Major Initiatives Calendar <i>(as of 12/9/16)</i>					FY17														
					2016						2017								
					Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun			
					Targeted Start Month (MM/YYYY)	Targeted Finish Month (MM/YYYY)	Status												
Project/Program																			
C O M P L E T E	Scholarship Management for Advancement	11/2015	04/2016	Complete															
	Biology Dept. Lab Research Positions - Application and Tracking	11/2015	07/2016	Complete															
	Redevelop the Here For You Mobile Application for the Wellness Center	02/2016	07/2016	Complete															
	Campus Labs - Extracts and Related Components	02/2016	08/2016	Complete															
	Establish ZOOM Technology for Conferencing	06/2016	09/2016	Complete															
	Move Student Refunds from LOCUS to Lawson	04/2016	12/2016	Complete															
A C T I V E	Oracle 12C Database Upgrade (Required for PS Upgrade)	09/2015	03/2017	Active															
	ITS Help Desk to Service Desk	04/2016	03/2017	Active															
	Evaluation of Event Mgmt Systems	11/2016	04/2017	Active															
	Sakai 11 Upgrade	09/2016	05/2017	Active															
	LCFS Technology Needs for EMR, HIPAA, and PCI	03/2016	05/2017	Active															
	Phone System Replacement - Phase 3	08/2015	06/2017	Active															
	Compliance Tracking Technology	11/2016	06/2017	Pending															
	Online Exam Proctoring Solutions - Pilot	12/2015	09/2017	On Hold															
	LUHS/LUC/HSD Technology Program (3)	05/2011	12/2017	Active															
	Business Intelligence/Data Warehouse (3)	01/2014	12/2017	Active															
	PeopleTools/LOCUS Upgrade (7)	01/2017	12/2017	Pending															
	ECM/Imaging Implementation (6)	11/2011	TBD	Active															
	Campus Construction Initiatives (2)	05/2012	TBD	Active															
	Online Performance Management System (2)	05/2013	TBD	Active															
	Information Security Program (8)	11/2014	TBD	Active															
	Faculty Information System Suite Enhancements	04/2015	TBD	Active															
	Lawson /Kronos Enhancements (8)	05/2015	TBD	Active															
	LOCUS Enhancements (6)	02/2016	TBD	Active															
	Advancement Systems (4)	03/2016	TBD	Active															
	Business Continuity/Disaster Recovery (12)	03/2013	TBD	On Hold															
	Access Control & Security - Maxxess (2)	04/2014	TBD	Pending															
	Hybrid On-line Nursing Program with Orbis	08/2016	TBD	Pending															
	Athletics Website Hosting Evaluation	12/2016	TBD	Pending															
Secure Communications for ePHI	01/2017	TBD	Pending																

- Completion date is not firm and will most likely be extended
 - Activity completed/in progress/planned
Red text denotes a change
 - Timing of the project is TBD

ITS Major Initiatives - FY17 Q3-Q4

Academic and Faculty Support

- LOCUS Enhancements (6)
- Access Control & Security - Maxxess (2)
- Faculty Information System Suite Enhancements
- Online Exam Proctoring Solutions – Pilot

Infrastructure

- Campus Construction Initiatives (2)
- Information Security Program (8)
- LUHS/LUC/HSD Technology Program (3)
- IT Disaster Recovery (12)
- Phone System Replacement

Administrative Initiatives

- Online Performance Management System (2)
- Lawson/Kronos Enhancements (3)
- Advancement Systems (4)
- Evaluation of Event Mgmt Systems
- Oracle 12C Database Upgrade
- Secure Communications for ePHI
- LCFS Technology Needs

Student Technology Support

- PeopleTools/LOCUS Upgrade (7)
- Hybrid On-line Nursing Program with Orbis
- Sakai 11 Upgrade

Continuous Service Development

- Business Intelligence/Data Warehouse (3)
- Enterprise Content Management (6)
- ITS Help Desk to Service Desk
- Compliance Tracking Technology
- Athletics Website Hosting Evaluation

Agenda

ITS Project Portfolio Prioritization - Results

- S. Malisch, J. Sibenaller

Advancement Upgrade

- M. Halverson, J. Sibenaller

Student System Upgrade

- C. Korinek, K. Smith

Phone System Upgrade

- D. Vonder Heide

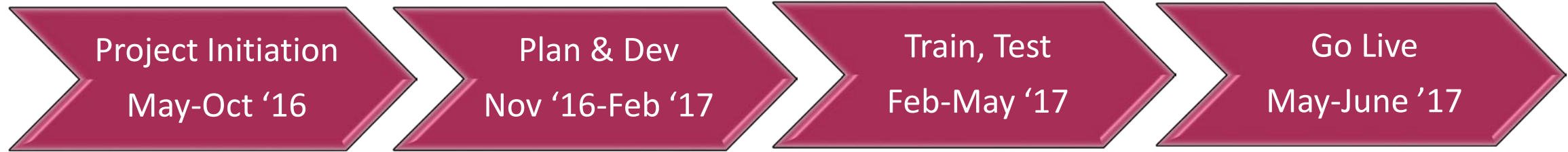
Document Management/ECM Upgrade

- J. Sibenaller

Advancement Systems Upgrade

- What we are upgrading:
 - Ellucian 9.8.1.1 to Ellucian 2015 (4 releases behind)
- Why we're upgrading:
 - Increased functionality for Advancement team
 - Streamlined gift entry process
 - Membership enhancements – additional address features & social media links
 - Home Page customization based on Loyola's needs
 - Additional Navigation features to quickly access key features (side & top)
 - Opportunities for standardization
 - Provides formalization of final push from Client to Web-based version
 - Ensures the team – including new team members – have a uniform understanding of the tool
 - Advancement Services provides training/support to just one version (i.e. not Client AND Web)
 - Server Upgrade provides increased processing speed
 - Further separation of infrastructure in support of LUHS
 - Become “current” with Ellucian Support

Advance 2015 Upgrade Timeline



- Project Kickoff
- Research & Discovery
 - LUHS/LUC Business Process Touch Point Document
 - POC
 - Report Gap Analysis
- LUC/LUHS Decision

- Environment Build-Out
- Active Directory Integration
- Security Requirements & Set-up (Apps, Forms)
- Database Object Archive
- Data Quality
- Train & Test Requirements

- Training
- User Acceptance Testing (Business Users)
- Technical Testing (ITS Team)
- Server upgrade
- Redundancy for LUHS Separation for LUC upgrade
- Build Out Prod

- Communication (LUC & LUHS)
- Go Live - PROD (May 2017)
- Go Live - PRE (June 2017)
- Support & Knowledge Sharing
- Project Hand off to Business
- Lessons Learned
- Project Close out



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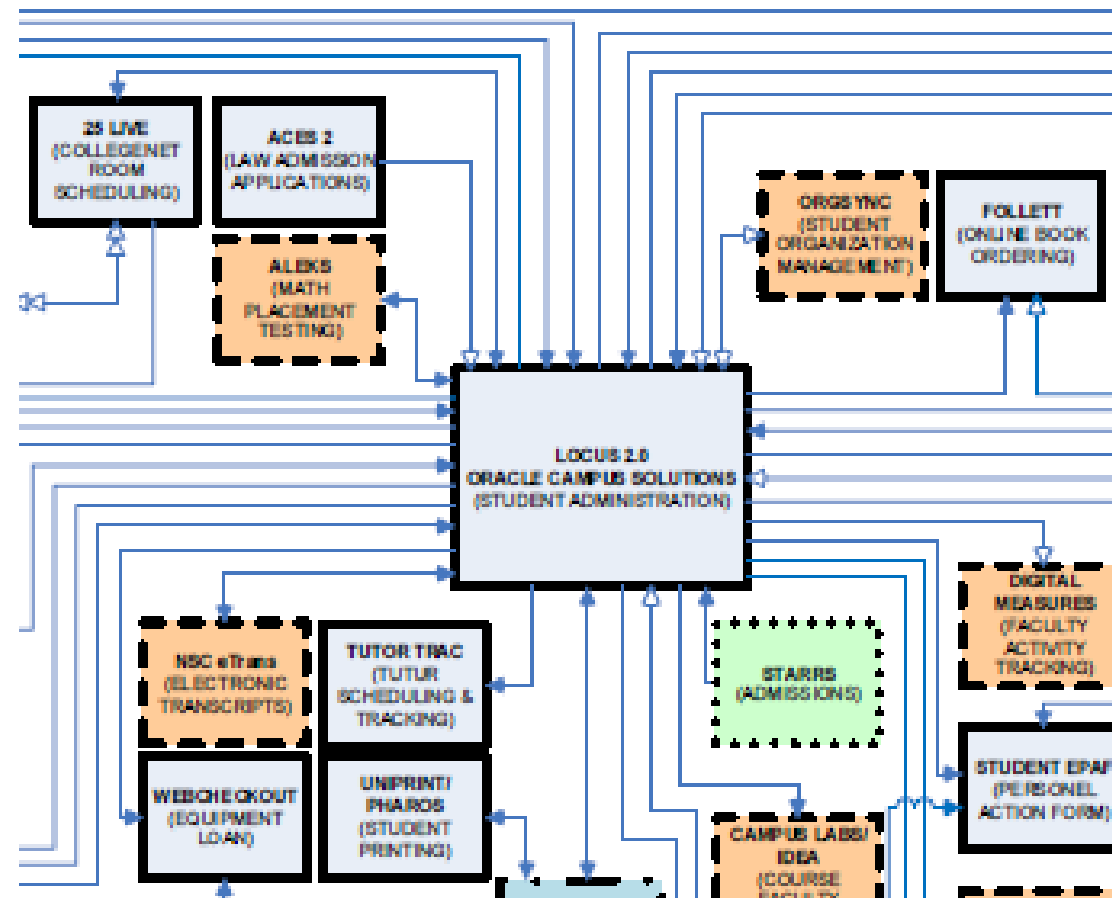
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LOCUS

LOYOLA'S ONLINE CONNECTION to UNIVERSITY SERVICES

- Student access to Demographics, Registration, Financial Aid, Billing, Grades, Advising, Apply for Graduation, etc.
- Faculty access to Class rosters, Grade rosters, Student photos, Advising and Administrative functions, etc.
- Staff access to Admissions, Student Groups, Curriculum Management, Class Scheduling, Award degrees, Issue Transcripts, etc.
- Alumni /Parent Guest access for appropriate functions.

LOCUS Application Data Relationships



- LOCUS provides data/interfaces with over 40 applications
- Source of truth for Student and Enrollment data

LOCUS - Campus Solutions 9.2 Upgrade

Why are we doing this?

- Campus Solutions customers are required to stay current with Campus Solutions (CS) and People Tools (PT) software versions in order to receive support from Oracle.
- Extended support for CS 9.0 will end December, 2019.
- Upgrading to Campus Solutions 9.2 and PeopleTools 8.55 will enable implementation of additional functional and technology features, some of which could replace existing customizations.

LOCUS - Campus Solutions 9.2 Upgrade

How are we doing this ?

- Researched possibilities from other schools and consultants on how to execute the upgrade
- Recommendations were to split the upgrade into two phases which will overlap
- Identified two pre-requisite projects (Crystal retirement, Student refund change)
- Phase 1 - Technical focus is on the upgrade of the database, application software and hardware, PeopleTools
- Phase 2 - Functional focus is on process changes from Bundle reviews to selective adoption of new features via PUM images. Creation of training and documentation required for usage and feature adoption.

LOCUS Upgrade Phase 1 - Technical

- This Upgrade will include:
 - Oracle PeopleSoft Campus Solutions (CS) 9.2 and PeopleTools 8.55 software
 - Oracle PeopleSoft Portal (aka Interaction Hub or I-Hub) to PeopleTools 8.55 software
 - Addition of 5 new servers (PUM (1 phy), Elasticsearch (2 phy), Software de-coupling (2 vm))
- Responsive Design - Will keep Loyola current with the vendor technology roadmap, as Oracle adapts Campus Solutions to the multiple user device type environment with maximum functionality and usability in a secure in-house infrastructure. This is the new user interface capability (Fluid) which will be introduced and expanded with Oracle updates.
- Selective Adoption - This upgrade also changes the software delivery mechanism by Oracle to PeopleSoft Update Manager (PUM) which will allow selective adoption and clearer dependency constraints.

LOCUS Upgrade Phase 2 - Functional

- Functional enhancements will be realized gradually after the completion of Phase 1- as released by Oracle for CS and as tools become more familiar to LUC technical and functional users. Phase II will plan for specific functional projects to take advantage of new capabilities.
- This phase will include Student, Faculty and Staff end user training and documentation to support wide spread use of new features and functionalities.
- Review of customizations to adapt or replace with new functionality.

LOCUS - Campus Solutions 9.2 Upgrade

Phase 1 Projects

PSS 2492 – Student System Upgrade Parent project

PSS 2514 – CS PeopleTools 8.55 Upgrade

PSS 2516 – Portal (iHUB) PeopleTools 8.55 Upgrade

PSS 2517 – Search Engine Upgrade (Elasticsearch)

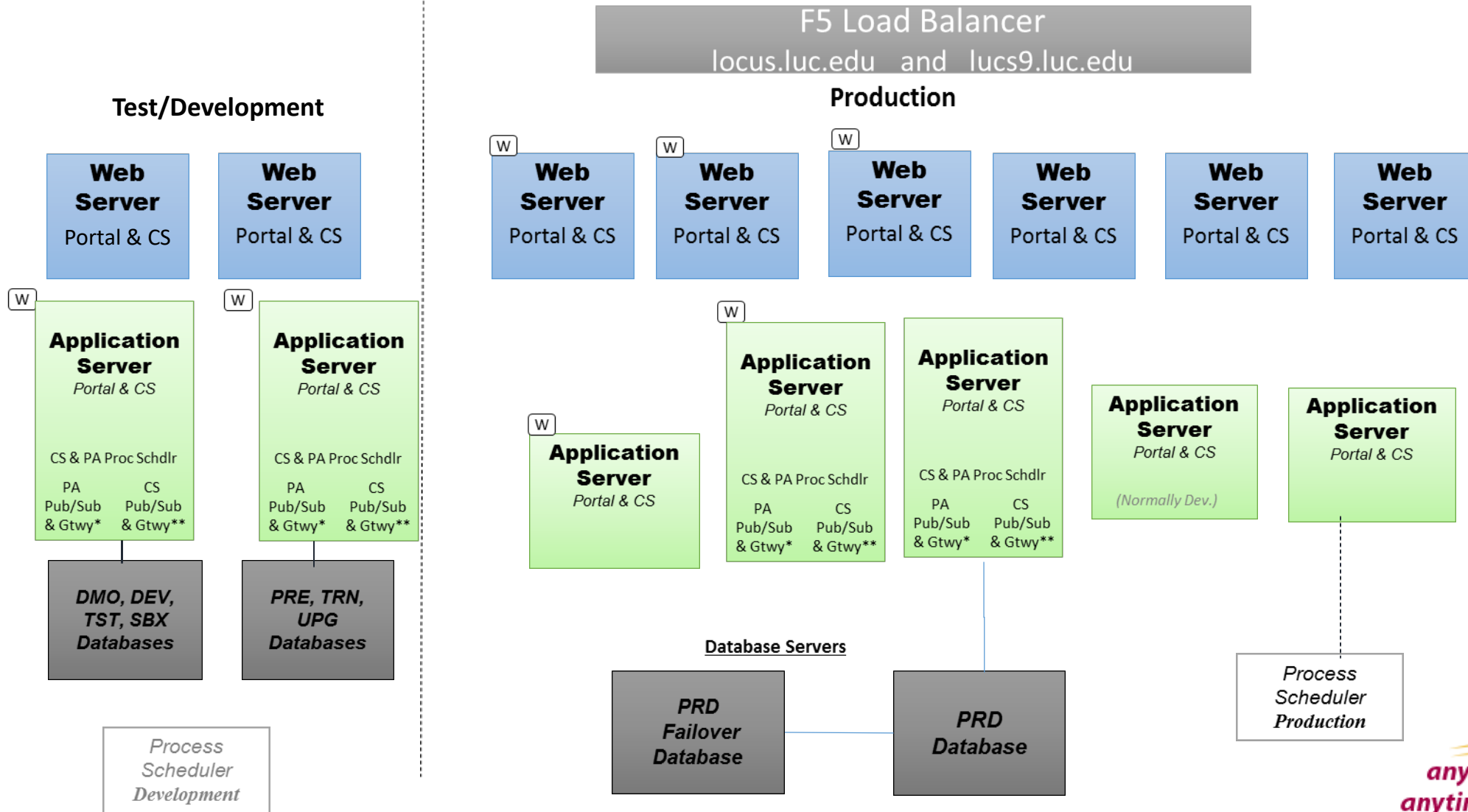
PSS 2518 – CS 9.2 Database and Application Upgrade

PSS 2519 – Decoupling Application and PTs Software

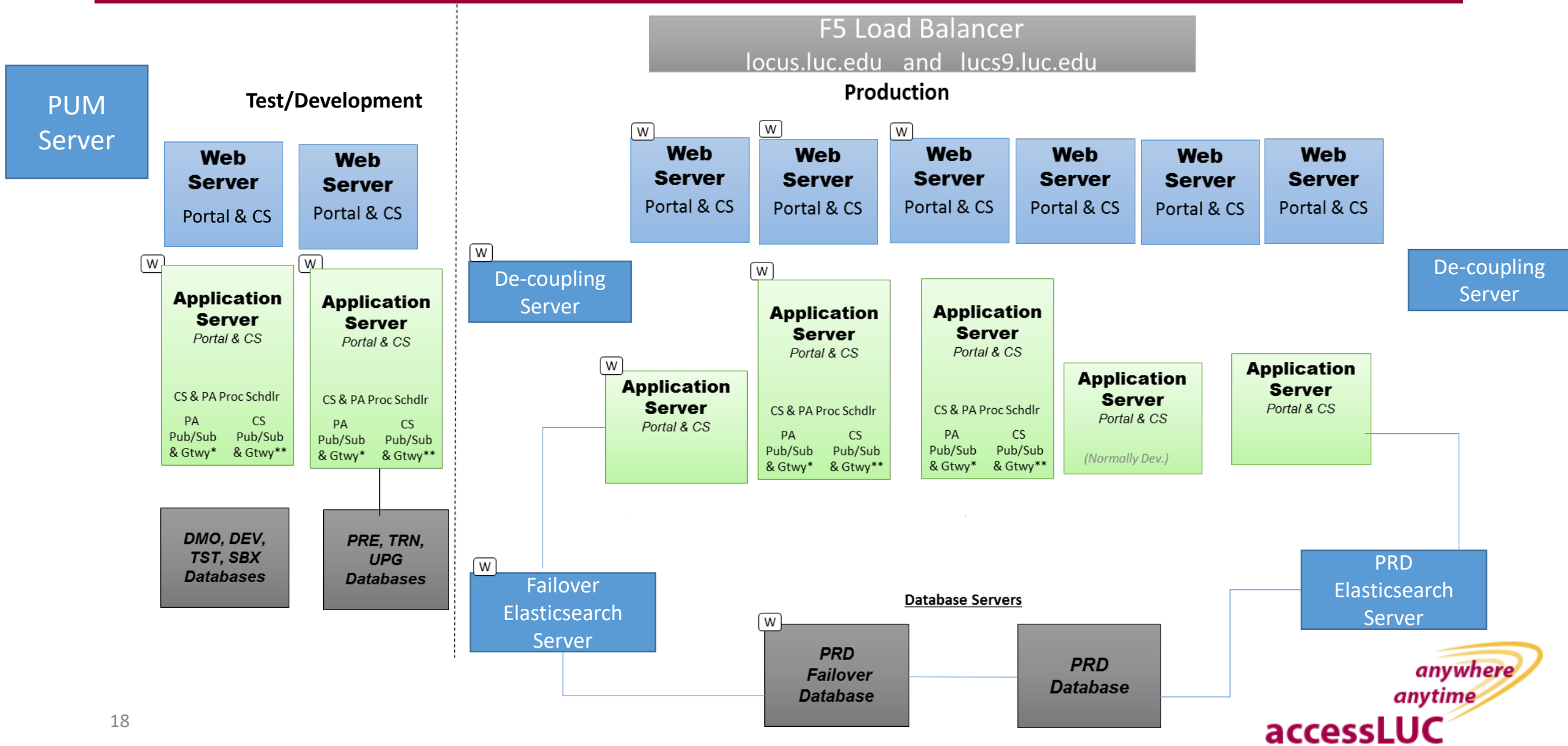
PSS 2520 – Change Management and Testing Tool

Phase 2 Projects - TBD

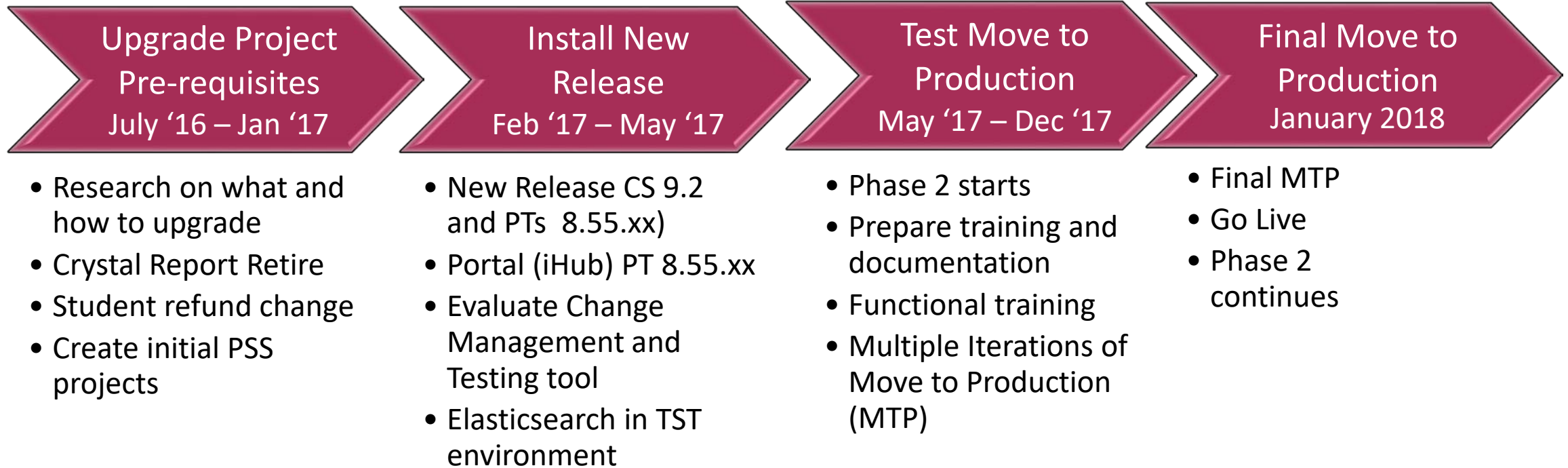
Current LOCUS Server Architecture



Upgraded LOCUS Server Architecture



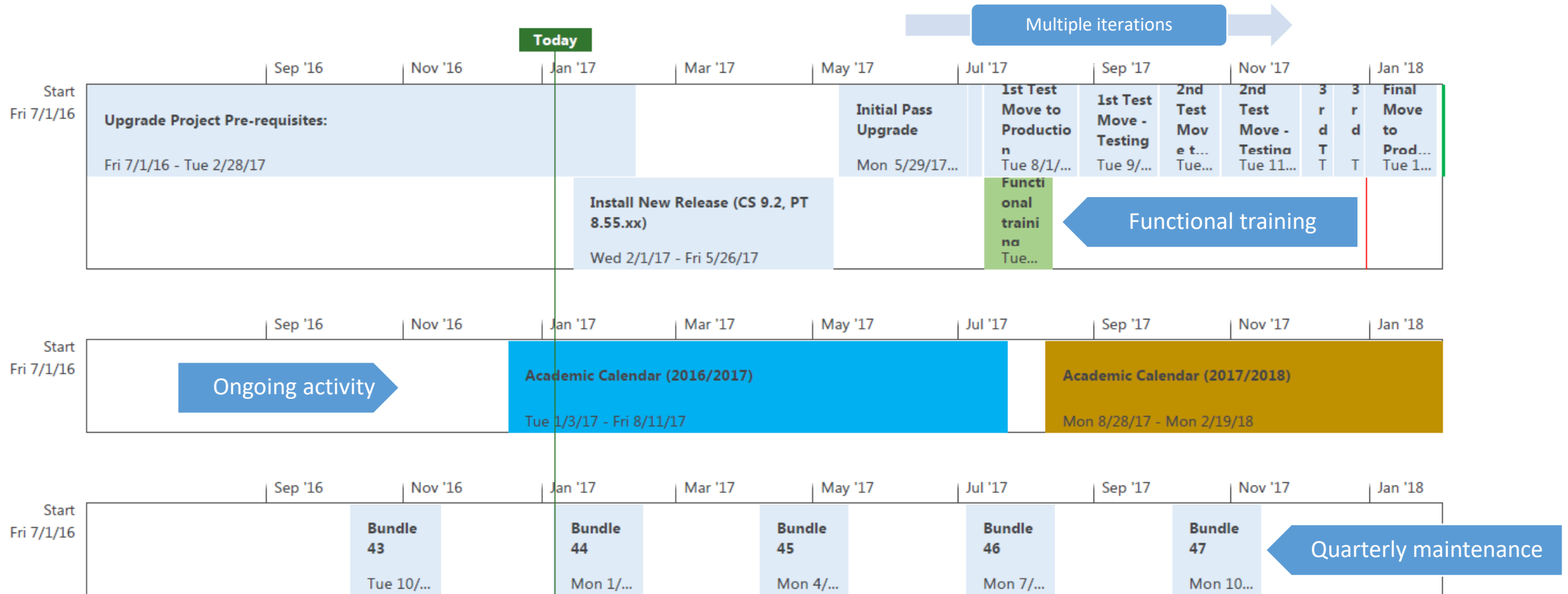
Proposed Project Schedule –Phase 1 (Technical)



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Proposed Project Schedule –Phase 1 (Technical)



Budget Summary

Hardware Cost	\$83,500
Software Cost	\$40,000
Technical Professional Services	\$12,500
Functional Professional Services	\$20,000

Total Budget	\$156,000

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Phone System Upgrade

Reasons for the Upgrade

- 31 year old system
- Unsupported hardware
- 3 major releases behind
- Power supply to system in jeopardy



Phone System Upgrade

Decision to stay TDM using Authentic Avaya.

- Benefits v. Cost
- Leverage existing sets and some hardware
- Avoid costly upgrade to data infrastructure
- Avoid re-training users
- Still required to support analog devices



Phone System Upgrade

Project Team

Loyola:

- Florence Yun – Project Manager
- Dave Gabrovich
- Dave Wieczorek
- Adina Tenenbaum

Altura:

Carol Copper – Project Manager
Jim Monk
Curt Meehan
Heron Leal
Paul Vice
Adrian Gallegos
Rob Roll



Phone System Upgrade

Current Status

- Contracts
- Equipment Delivered
- Project Meetings
- Site-Walk Through

Next Steps

- Complete network surveys
- Begin hardware installation at LSC
- Migrate LSC
- Begin hardware installation at WTC
- Migrate WTC



Phone System Upgrade Timeline



Phone System Upgrade

Purchases

- All hardware purchased and received.
- All software and licenses purchased and received.
- Acquired HSD licenses (200 Analog, 800 digital) for future use.
- Maintenance - 3year prepay from LUC finance payback scheduled over FY17 - FY20.

Phone System Upgrade

Requested Enhancements

- Enterprise IVR system (Switchboard, Law School)
- Enterprise Recording services (Security, Helpdesk, Bursars)
- BCMS replacement ACD MGMT (Helpdesk, Bursars)
- Automated dialing system (Bursars, Alumni Relations)
- Call Accounting system – (Department Chargeback)



Phone System Upgrade

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🔑 Trump Promises 'Very Major' Border Tax on Outsourcing Companies



PERSONAL TECHNOLOGY
🔑 Why Samsung's Battery Fix ...

BUSINESS

Avaya Files for Chapter 11 Bankruptcy Protection

The communications company also suspended plans to sell its call center business

By IMANI MOISE and MATT JARZEMSKY

Updated Jan. 19, 2017 5:19 p.m. ET

Communications company Avaya Inc. filed for chapter 11 bankruptcy protection Thursday as the company extended its decadelong string of annual losses.

Avaya, which installs and operates corporate phone systems, said it is seeking to restructure its balance sheet to put it in better position for the future. The Santa Clara,

Calif. company also suspended plans to sell its call center business. [View more](#)

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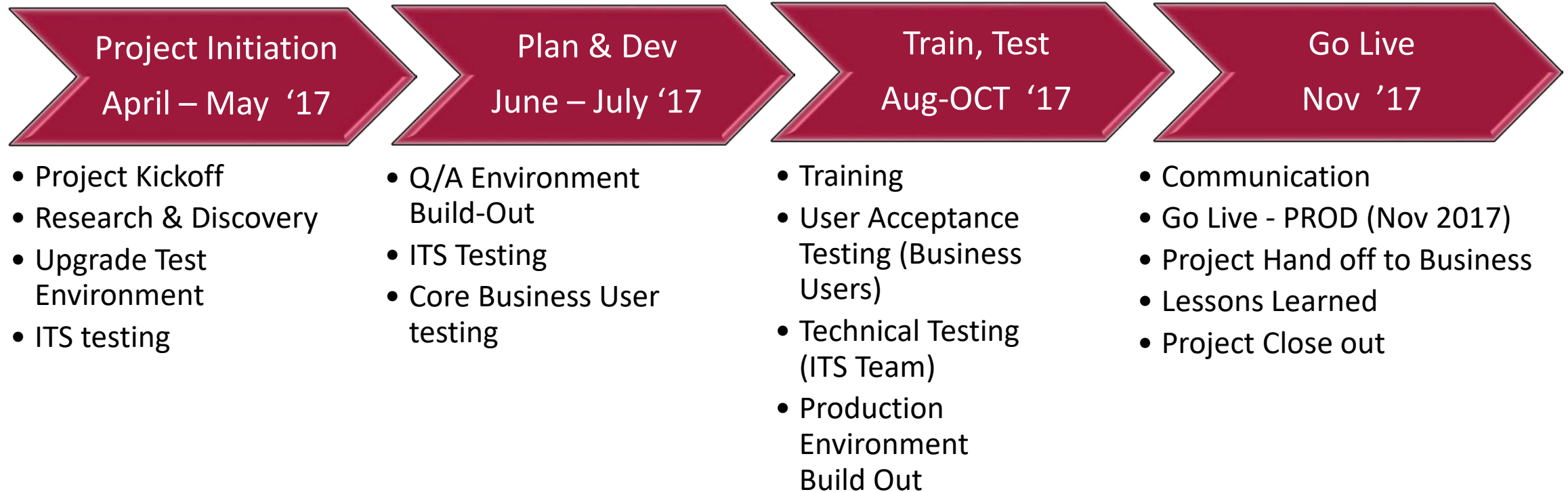
Document Management/ECM Upgrade

- J. Sibenaller

Document Management System Upgrade

- What we are upgrading:
 - DocFinity 10.13.3 to DocFinity 11.00.x
- Why we're upgrading:
 - Increased stability for DocFinity users
 - HTML5 replaces the need for outdated Flash (browsers are phasing out Flash)
 - Over 100 customer bugs fixed in new release
 - Improved Security
 - Feature enhancements:
 - improved user interface including one-click full screen panels
 - pop-out viewer
 - ad-hoc workflows
 - mobile eForms
 - revamped document editing & hot keys
 - Take advantage of HTML5 flexibility & feature set (forms building)
 - Become “current” with DocFinity Support

DocFinity Version 11 Upgrade Timeline



2017 ITESC Schedule

January 26, 2017 - Thursday, 1:30-3:30 PM

- Project Portfolio Prioritization Results
- Status Updates – Major Upgrades
 - Student System, Phone System, Advance, Document Mgmt

March 30, 2017 - Thursday, 1:30-3:30 PM

June 15, 2017 - Thursday, 1:30-3:30 PM

- Project Portfolio Prioritization

August 31, 2017 – Thursday 1:30-3:30 PM

October 26, 2017 - Thursday, 1:30-3:30 PM

December 12, 2017 - Tuesday, 1:30-3:30 PM

- Project Portfolio Prioritization