

ITS Executive Steering Committee (ITESC)

Agenda and Materials – October 22nd, 2020



Agenda

Loyola Digital Experience (LDE) – D. Fitzgerald, S. Malisch, J. Sibenaller

- Enterprise Learning Hub
- EAB Navigate Phase II - Student Success Platform
- MFA/Lawson ESS
- Digital Assistant / Chatbot

Adjustments to Portfolio - S. Malisch, J. Sibenaller

- Application Portfolio Breakdown/Impact
- Change Calendar
- Major Initiative - Research Computing Services
- Proposed New ITESC Sub-Committee

Loyola Digital Experience (LDE)



Three themes:

1. (Foundational): Delivering the Next Best Experience for Students, Faculty and Staff
 - Architecture and Infrastructure
 - Identity and Access Management
 - Security
 - Single Sign On
2. (Transformational): Data, Dashboards, Digitization, Innovation
 - Data Warehouse; Business Intelligence
 - Decision Support Systems
 - Internet of Things (administrative)
 - Artificial Intelligence, Machine Learning, Augmented/Virtual Reality (academic)
3. (Consumable Experience): “Simple, Secure, Seamless”
 - Combining old stuff; Exploiting new stuff -> Enabling better experiences
 - Self-service
 - Device independent
 - Virtualization/Cloud
 - Anytime Anywhere Access
 - “Virtual Portal”

• Multi-Factor Authentication

• Digital Assistant – “LUie”

• Enterprise Learning Hub
• EAB Navigate
• Lawson Outside the Firewall/Expanded Self-Service

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Enterprise Learning Hub

Goal: Provide a single source landing page or “hub” for all training and administrative tasks to improve user experience and foster an improved learning environment.

Recommendation:

1. Validate the ability to build an Enterprise Learning Hub (ELH) in-house
 - Code re-use
 - Complexity
 - Timing
 - Staffing (need a java developer)
2. Roll-out the ELH functionality in an iterative fashion
3. Prioritize HR, Title IX & Security Awareness in the initial release
 - Goal is Fall 2020
4. Add student training and compliance tasks as iterations
5. Future phases to include non-disclosure, policy reviews, etc.

Costs: Build vs Buy

Utilize the \$100K capital line to fund a java developer consultant

Enterprise Learning Hub

DEMO

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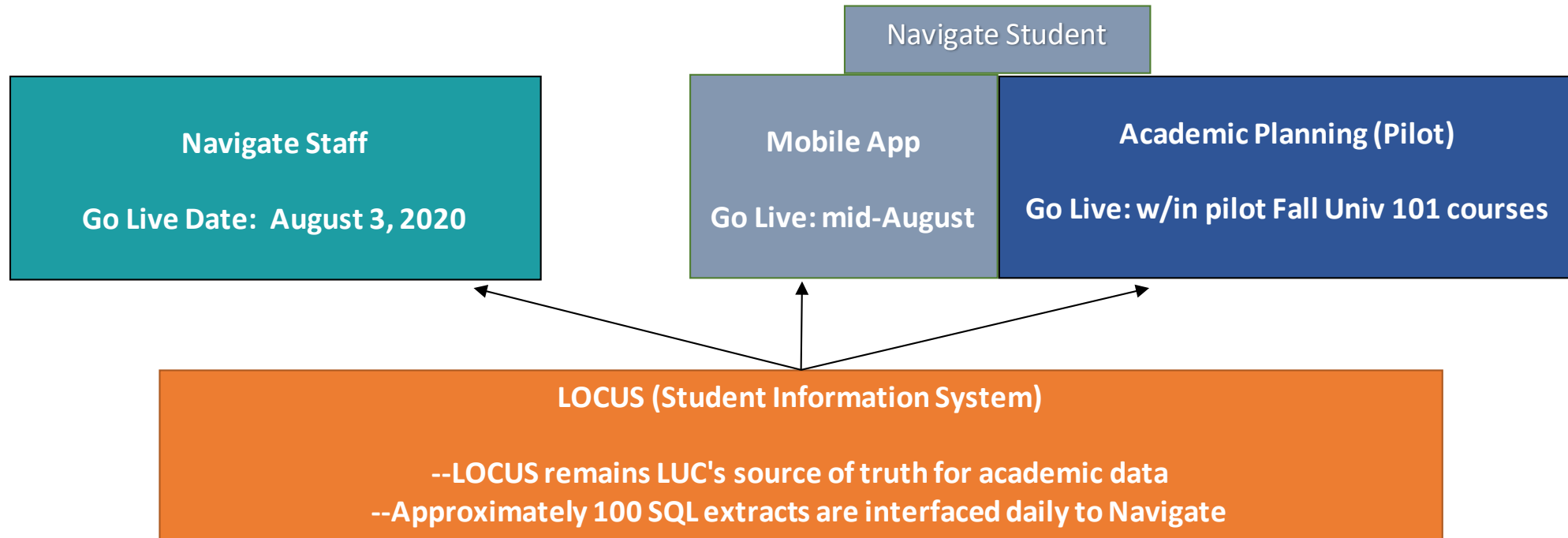
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EAB Navigate

EAB Navigate Phase 1 Implementation



EAB Navigate Phase I

Navigate Staff - Go Live 8/3

- Rolled out to all undergraduate academic advising areas. Navigate staff provides a standard platform for appointment scheduling, advising notes and has robust search and communication tools.

Navigate Student - Go Live 8/17

- Available to all undergraduate students. Provides an easy way to scheduled appointments with assigned advisors and gives a user-friendly view of class schedules, holds and custom content about campus resources and events.

Academic Planning – Go Live 10/6

- Pilot group, consisting of sections of Univ 101 taught by team members, will use this tool to build out four year academic plans with students.

EAB Navigate Phase I

Utilization Metrics

- 5087 advising notes have been entered into Navigate since 8/3
- 5848 communications (5274 emails, 574 texts) have been sent
- 1435 appointments have been scheduled
- 3097 unique student log-ins
 - 80% of these students have downloaded the app and logged in via mobile device
 - 20% have accessed the platform via a desktop URL

EAB Navigate Phase II

	New Users	New Functionality
Nav Staff	<p>Onboard new offices and support their workflows</p> <p><u>Possible new user groups: Arrupe, Center for Experiential Learning, Undergraduate Program Directors (small subset of faculty), Financial Wellness (small subset of Financial Aid), Tutoring Center pilot, Athletics</u></p>	<p>Rollout additional features</p> <p>Possible new functionality: progress reports, case management</p>
Navigate Student	<p>Keep encouraging adoption by students</p>	<p>Study Buddy functionality</p> <p>New app content</p>
Academic Planning	<p>TBD based on pilot</p> <p>--Will we make Academic Planning standard in all Univ 101 classes?</p> <p>--Will we encourage all advisors using Nav Staff to use Academic Planning with their advisees?</p>	<p>Registration setup – explore priority registration options</p> <p>--Explore schedule building.</p>
Technical Projects	<p>Interface of Advising Notes, Navigate → LOCUS</p> <p>Registration API</p>	<p>Research deep-linking (Navigate → DocFinity or Maxient)</p>

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Loyola Digital Experience Schedule



Loyola Digital Experience - Foundation Timeline - 10/19/2020

Active Projects	2019												2020										2021							
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Privileged Identity Management												planning	planning																	
Multi-Factor Authentication																														
Multi-Factor Authentication Application Enablement (LOCUS, Sakai, etc)																														
Information Protection and Data Loss Prevention																														
Password Self-service																														
Mobile Device Management																														
Loyola Digital Experience Portal																														
Complete Projects																														
Exchange Online (POC)	COMPLETE																													
Exchange Online Migration			COMPLETE																											
LastPass Password Management						COMPLETE																								
Exchange Online Protection and Advanced Threat Protection(email)													COMPLETE																	



Lawson MFA/ESS Portal

Employee Self-Service (ESS) was updated with a new look and feel on 10/12.

- The new ESS Portal features a redesigned landing page making it easier for employees to find and access their pay and benefits information.
- In addition to the redesigned layout, you can view and update the following information in the new ESS portal using Multi-Factor Authentication (MFA).
 - Please note the below list is not exhaustive:
 - View Current Benefits
 - Complete Annual Benefits Enrollment
 - View Leave Balances
 - View Paystubs
 - View your W-2/1095-C
 - Change your Address

Change your Direct Deposit **New!**

- This allows employees to add or change their direct deposit information on their own. Employees can choose to set up to 5 different direct deposit accounts.

Change your Federal Tax Withholding **New!**

- This allows employees to update their Federal W-4 Tax Withholding information on their own.

How do you access the new ESS portal?

Go to <https://ess.luc.edu> – we recommend that you bookmark this new URL.

Lawson MFA/ESS Portal

Portal Home 

Loyola University Chicago Employee Self-Service Portal



Welcome

Welcome to Loyola University Chicago's Employee Self-Service portal. Use this site to check important information such as benefits, pay, leave balances, and more.

Employee Information

- [Change of Address](#)
- [Dependents](#)
- [Leave Balances](#)

Benefits

2021 Benefits Open Enrollment

The Open Enrollment period for 2021 benefit elections will take place through Employee Self-Service beginning November 2 and ending November 13. This is your annual opportunity to review and make changes to your benefits. More at [LUC.edu/hr/openenrollment](https://luc.edu/hr/openenrollment).

- [Beneficiary](#)
- [Benefit Handbook](#)

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The Numbers – Post Pilot

- Bot Success Rate
 - Pilot – 86%
 - Post Pilot – 89%
- Maintained 91% Positive Feedback
- Average Conversations a month – 220
- Average Answers a month – 500 or 2.25 per conversation
- Average Campus Solutions Answers a month – 6



Loyola Digital Assistant

Personalized Questions

Personalized Questions

250

Campus Solutions Questions

15

Campus Solutions Updates

3

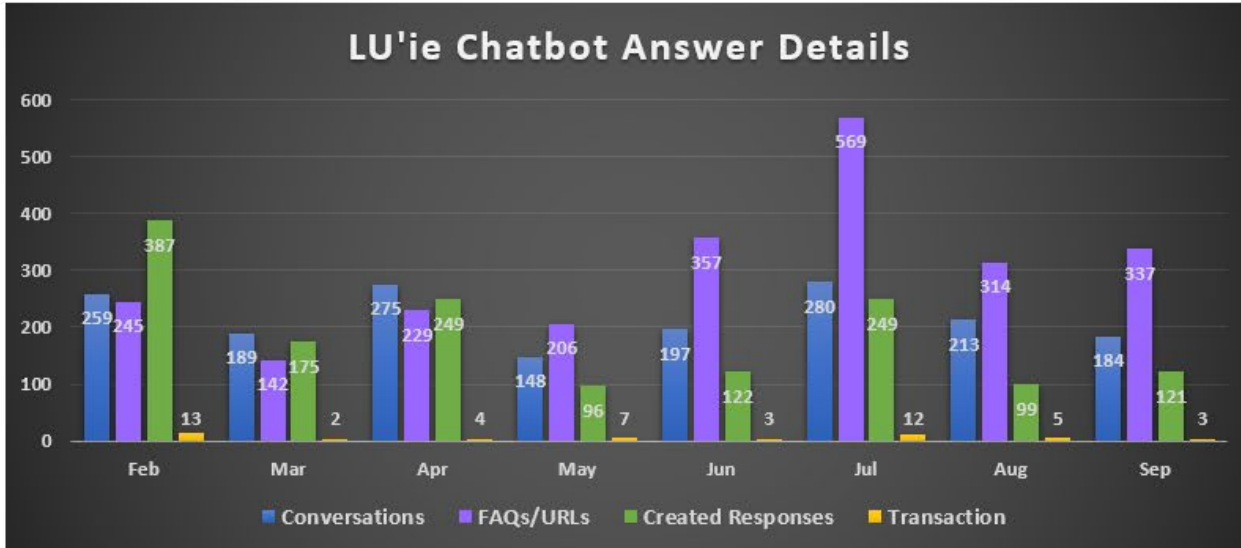
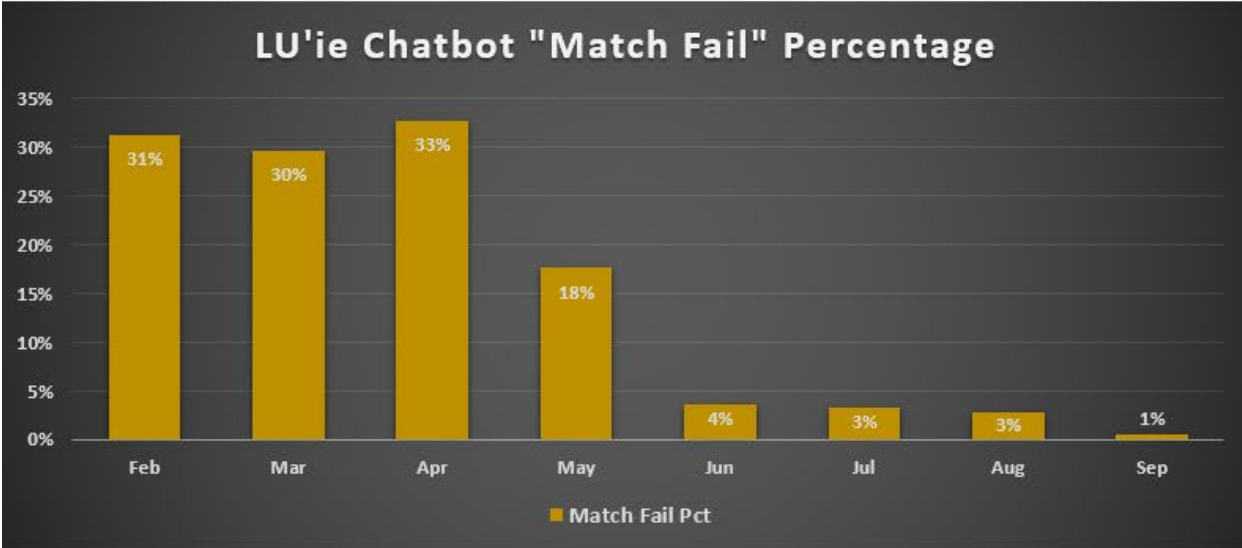
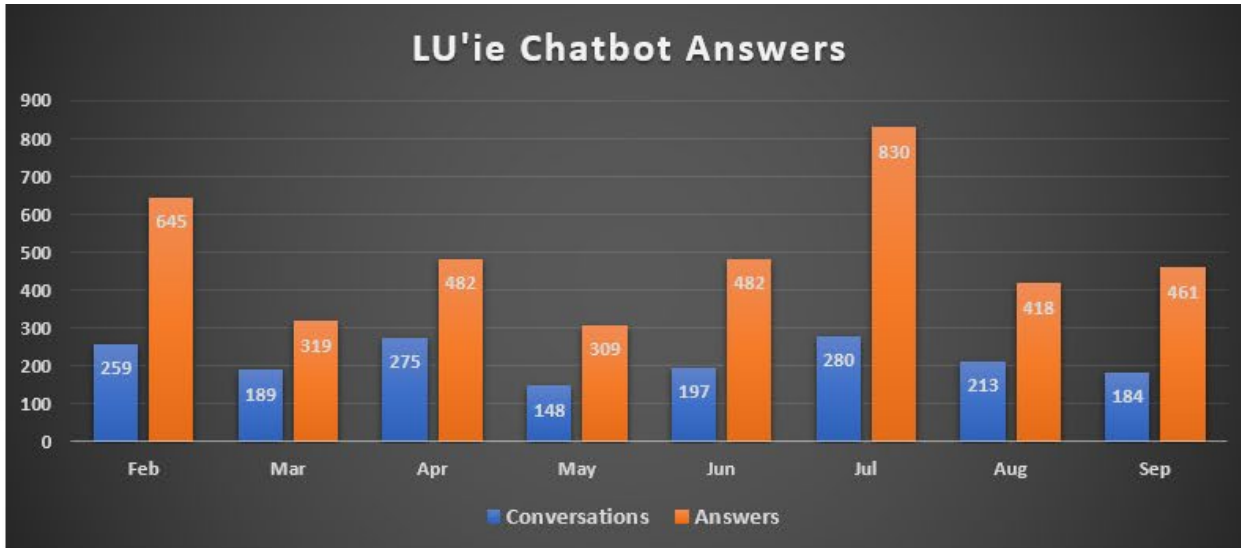
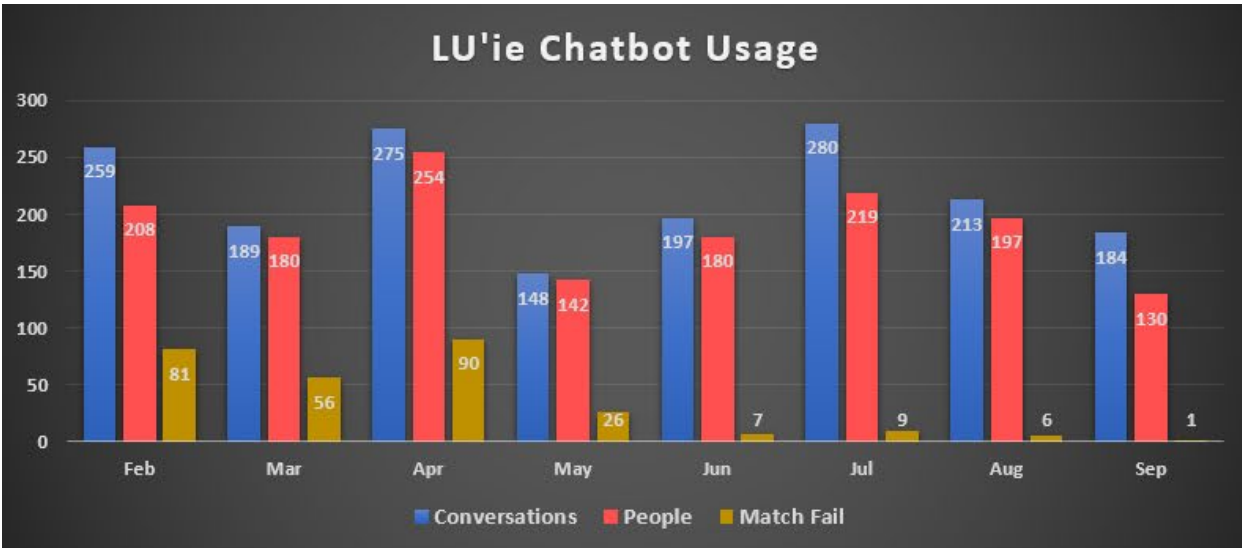
Advisor Questions

- Has a student granted FERPA access, and if so, to whom?
- Show me person-comment entries for a student.
- Show me a student's class schedule
- Show me a student's course grades
- Show me a student's cumulative or term GPA.
- Show me midterm alerts for a student.
- **Can you approve a student's course load?**
- Has a student applied for graduation?

Student Questions

- How much financial aid did I receive?
- **How do I change my address?**
- **How do I change my phone number?**
- Who is my emergency contact?
- Am I waitlisted in any classes
- What are my grades?
- What's my GPA?

Digital Assistant/Chatbot Metrics



Next Steps – LUie

- Take advantage of timely opportunity to expand self-service during COVID
- Governance
 - Create working group to serve as departmental leads, accountable for progress, distribution of work.
 - Types of workstreams:
 1. Existing/Static information, URLs, Frequently Asked Questions
 2. Customer Service inquiries/answering live questions; may be more dynamic
 3. Addressing new questions captured by LUie that we don't currently have answers for
 - Identifies issues and new opportunities, facilitate solutions
- Proposed Initial Working Group
 - Identify department leads who will advance content development and keep current

Financial Aid	Academic Advising	ITS
Human Resources	Enrollment Management	UMC

Chatbot Luie - Schedule

Current Project Status

- PSS 3024 Chatbot Production Infrastructure Deployment – Go Live July 2020
- PSS 3025 Chatbot setup enhancements
 - Non-authentication guest bot – Go Live October 2020
 - Adding bot to more web pages
 - Updating pilot departments questions/content (Bursar, Advising, ITS) – Target Completion December 2020

Future department implementations include:

- PSS 3005 Chatbot HR
- PSS 3023 Chatbot Financial Aid
- PSS 3027 Chatbot Academic Advising expansion
- PSS 3026 Chatbot ITS expansion

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Application Portfolio Breakdown/Impact

Draft

Tab	Row Nbr	Program Group	Proposed Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Pre-Approved	1-4	LOCUS Enhancements (4)	Pre-Approved	Large	Active	Q1 FY22	Enterprise/Multiple
Pre-Approved	5-10	Information Security Program (6)	Pre-Approved	Large	Active	Q2 FY21	Information Technology Services
Pre-Approved	11-16	BCDR/Failover (6)	Pre-Approved	XLarge	Active	Q2 FY21	Enterprise/Multiple
Pre-Approved	17-21	Enterprise Content Management (5)	Pre-Approved	Large	Active	TBD	Enterprise/Multiple
Pre-Approved	22-34	Business Intelligence/Data Warehouse (13)	Pre-Approved	XLarge	Active	TBD	Information Technology Services
Pre-Approved	35-40	Lawson/Kronos (5)	Pre-Approved	XLarge	Active	TBD	Insitutional Research Board
IRB Approved	41-45	Research Computing Services (5)	IRB Approved	Large	Active	TBD	Enterprise/Multiple
COVID-19	46-50	COVID-19 Related Projects (5)	Pre-Approved	XLarge	Active	TBD	Enterprise/Multiple
		LDE Foundation: Collaboration and Security (8)	1	XLarge	Active	TBD	Information Technology Services
Priority A	51	LDE Delivery Program		XLarge	Active	Q2 FY21	Information Technology Services
Priority A	52	Azure Information Protection & Data Loss Prevention POC Project		XLarge	Active	Q2 FY21	Information Technology Services
Priority A	53	Enterprise Mobility Management		Medium	Active	Q2 FY21	Information Technology Services
Priority A	54	2 Factor Authentication		Medium	Active	Q2 FY21	Information Technology Services
Priority A	55	Azure Password Self-Service		Large	Pending	Q1 FY21	Information Technology Services
Priority A	56	Azure Privileged Identity Management		Medium	Pending	TBD	Information Technology Services
Priority A	57	Exchange Online Protection & Advanced Threat Protection		Large	Pending	Q1 FY21	Information Technology Services
Priority A	58	O365 Application Portal (Single Sign-On)		XLarge	Pending	TBD	Information Technology Services
Priority A	59	Planning and Implement Course Schedule Builder+Solutions (EAB Navigate)		2	XLarge	Active	Q1 FY21
Priority A	60	Learning Portfolio Implementation (Digication)	3	Large	Active	Q1 FY21	Center for Experiential Learning



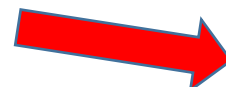
Application Portfolio Breakdown/Impact

Draft

“T-Shirting” is the methodology that ITS uses to estimate the ITS effort to be applied to the project.

Current T-Shirt Estimates

T-Shirt Sizing	Size
X-Small	1-4 Days
Small	5-30 Days
Medium	31-60 Days
Large	61-120 Days
X-Large	>120 Days



Revised T-Shirt Estimates

T-Shirt Sizing	Size
XX-Small	½-2 Days
X-Small	3-5 Days
Small	5-30 Days
Medium	31-60 Days
Large	61-120 Days
X-Large	121-180 Days
XX-Large	>180 Days

Change Calendar

Draft

ITS Major Initiatives Calendar FY21 Q2-Q3

Dept	PM	Project	Go Live	Audience	Count	10/03	10/10	10/17	10/24	10/31	11/07	11/14
IA	Adams	PUM Upgrade to v18	9/27	Students/Faculty/Staff	46,000							
DSA	Tomley	MFA	9/28	Students/Faculty/Staff	1199							
INF	Schleibinger	Locus Multifactor Project - Phase 1	10/1	Staff	5							
INF	Wieczorek	Camera Installation - Campus Safety	10/1	Staff	20							
AOS	Walker	ZOOM Retention	10/2	Faculty/Staff	5600							
DSA	Bunker	Lawson Login	10/5	Faculty/Staff	5600							
DSA	Bunker	Lawson MFA ESS	10/12	Faculty/Staff	5600							
IA	Goodman	Kronos v8.1 Upgrade	10/15	Faculty/Staff	5600							
INF	Wieczorek	Call Accounting System - Reports Upgrade	10/19	Staff	40							
IA	Jebmalaidass	Enterprise Learning Hub Pilot	10/20	ITS, HR, Library	200							
IA	Jebmalaidass	Enterprise Learning Hub	10/23	Faculty/Staff	5600							
ICR	Valdez	REDCap. Upgrade to 9.7.1	10/24	Faculty/Grad Students	50							
DSA	Tomley	Legacy Protocols in Groups	10/27	Students	50							
DSA	Tomley	Legacy Protocols in Groups	10/28	Students	50							
INF	Tapia	Azure Priviledged Identity Management (PIM)	11/1	Staff	30							
INF	Tapia	SAN Replacement Project - Phase 1	11/1	Staff	40							
INF	Wieczorek	New Firewall Implementation with UISO	11/1	Students/Faculty/Staff	46,000							
INF	Wieczorek	CTRE Switch Removal and Reuse	11/1	Faculty/Staff	600							
INF	Wieczorek	Sovereign - Data / Voice Migration to LSC	11/1	Staff	30							
ICR	Zelisko	PCOR Datamart Upgrade, Datavant install	11/1	Informatics Staff	10							
INF	Francis	Velos Project	11/9	Faculty/Staff	50							
DSA	Tomley	Legacy Protocols in Groups	11/9	Students	50							
DSA	Tomley	Legacy Protocols in Groups	11/10	Students	75							
DSA	Tomley	Legacy Protocols in Groups	11/11	Students	50							
DSA	Tomley	Legacy Protocols in Groups	11/12	Students	75							

Major Initiative - Research Computing Services

Draft

Academic and Faculty Support

- LOCUS Enhancements (4)
- Customer Relationship Management (CRM) System Evaluation for SON
- Faculty Review/Administration Solution (Interfolio)
- LUC Dynamic Faculty Database
- Review and Evaluate Proposed Research Administration Solutions

Administrative Initiatives

- COVID-19 Related Projects (12)
- Lawson/Kronos Enhancements (5)
- Advancement/Development (3)
- Space and Asset Mgmt System - Phase II
- T4 Sitemanager Upgrade



Student Technology Support

- EAB Navigate Phase II
- LOCUS Fluid Page Rollouts
- Learning Portfolio Updates (Digication Phase II)
- Sakai v20 Upgrade

Infrastructure

- Campus Construction Initiatives (8)
- Information Security Program (6)
- IT Disaster Recovery (6)
- LDE Foundation: Collaboration and Security (8)
- Paciolan Athletic Ticketing Replacement for Neulion
- Replacement of LUC's Storage Area Network

Research Computing Services

- Initiative A
- Initiative B
- Initiative C
- Initiative D



"Loyola Digital Experience"

Continuous Service Development

- Business Intelligence/Data Warehouse (13)
- Enterprise Content Management (5)
- LDE Transformation: Digital Assistant/Chatbots (6)
- HSC Technology Discovery & Alignment (3)

Proposed New ITESC Sub-Committee

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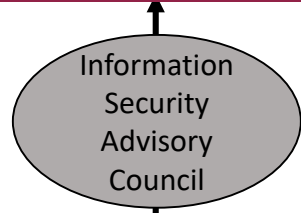
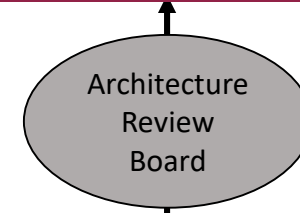
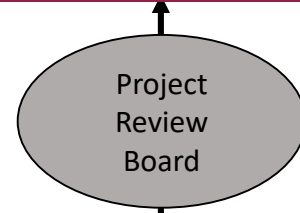
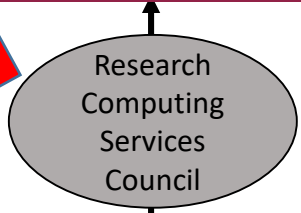
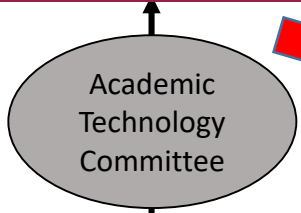
*External Request



Chair: S. Malisch, VP & CIO
Charter
The ITESC leads a set of processes for IT Governance and investment prioritization for Loyola University Chicago



Recommended Technology & Initiatives



Chair: Robyn Mallett
Charter
The Academic Technology Sub-Committee is charged with advising on technology directions, strategies, policies, plans and priorities important to Loyola's goals in teaching, learning, research and other academic objectives.

Co-Chair: Co-Chair:
Charter
The Research Computing Services Council...

Co-Chair: David Slavsky Co-Chair: Tony Vavarutsos
Charter
This cross-functional committee will enhance the value, quality, security, and understanding of institutional data through coordinated efforts of campus stakeholders. The group will establish a framework for appropriate access to and use of institutional data.

Chair: J. Sibenaller
Charter
The Project Review Board is charged with the responsibility of reviewing and prioritizing all work requests that are presented to ITS for application review, installation, development, enhancement or customization.

Chair: J. Sibenaller
Charter
The Architecture Review Board will build the technology roadmap that enables Loyola University Chicago to fulfill its mission and vision effectively while adapting to a changing higher education environment.

Chair: J. Pardonek
Charter
The Information Security Advisory Council will provide guidance and oversight of the Information Security program with an emphasis on risk assessment, risk prioritization, strategy and policy issues.

2020 ITESC Schedule

March 3rd, 2020 - Tuesday, 1:00-3:00 PM – Cancelled due to COVID-19 Move Online

- ITESC Committees
- Calendar View of Major Rollouts
- Student Communications
- HSC Phone System

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

- COVID-19 Summary
- LDE Foundation: Collaboration & Security - Revised Schedule
- Short-Term Technology Planning & Decisions
- Mid/Long-Term Technology Planning & Decisions

June 18, 2020 - Thursday, 1:00-3:00 PM

- COVID-19 Maintenance Savings
- Fluid Development
- Enterprise learning Hub
- Project Portfolio Prioritization

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

- Start of School Update
- EAB Student Success Platform
- Loyola Digital Experience Schedule Progress
- Faculty Administration Re-architecture Strategy
- ITS Portfolio Prioritization Review

October 22, 2020 - Tuesday, 1:00-3:00 PM

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December 8, 2020 - Tuesday, 1:00-3:00 PM

- Project Portfolio Prioritization