ITS Executive Steering Committee (ITESC)

Agenda and Materials – December 14, 2021

Technology@Loyola
INFORMATION TECHNOLOGY AND SERVICES
LOYOLA UNIVERSITY CHICAGO

Agenda

HIPAA Compliant Teleconferencing

- J. Sibenaller

Data Governance & Integrity

- S. Malisch, J. Sibenaller

Project Portfolio Prioritization

- S. Malisch, J. Sibenaller

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

HIPAA Compliant Teleconferencing

Scope

- Determine the HIPAA compliance impact of sharing private health information during online collaboration sessions/meetings

Concerns

- Pre and post-pandemic, the use of online meeting technology for healthcare purposes would require us to sign a Business Associates Agreement (BAA) with providers (like Zoom & Microsoft)
  - We believe…

    Signing a BAA would make us a covered entity & require compliance with the HIPAA Security Rule (XL enterprise undertaking, additional costs involved)
- Ease of enforcement of compliance with HIPAA rules during pandemic
  - When does this expire? What happens when it does?
  - What are the covered entity status impacts?

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

HIPAA Compliant Teleconferencing

Activities

- Determined subject matter experts for use cases/needs
  - Social Work
  - Medicine
  - Nursing
  - Health Sciences & Public Health
  - Education
  - Added Wellness, Research, Community & Family Services
- Engaged Office of the General Counsel (OGC) to validate HIPAA policy requirements & impacts
- Scheduled interview sessions, conducted 1st session

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

HIPAA Compliant Teleconferencing

Next Steps

- Complete all interviews
- Document needs & use cases
- Determine product changes regarding BAA agreements
- Identify appropriate product direction
- Validate approach with OGC
- Provide product recommendation to HIPAA Compliance Officer, Provost & CIO
- Communicate actions to the ITESC

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

Agenda

HIPAA Compliant Teleconferencing

- J. Sibenaller

Data Governance & Integrity

- S. Malisch, J. Sibenaller

Project Portfolio Prioritization

- S. Malisch, J. Sibenaller

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

Data Integrity

From Feb 2021

Sources of Data:

- **Multiple Sources** – Conflicts
- **Lack of Updates** – Lawson to Locus
- **NAP for Employees** – JFRC, Faculty Admin

Data Inconsistencies:

- **Lack of Consistent Sources** – LUWare, Active Directory, Web Directory
- **Missing / Stale Data** – Campus Location, Office Location, Manager
- **Attribute Repurposing** – Employee Status

Conflicting/Complex Business Rules:

- **Roles** – High Role Designates Primary Status
- **Redundant Attributes** – Not Updated/Used
- **Application Processes** – Differing Data Collected

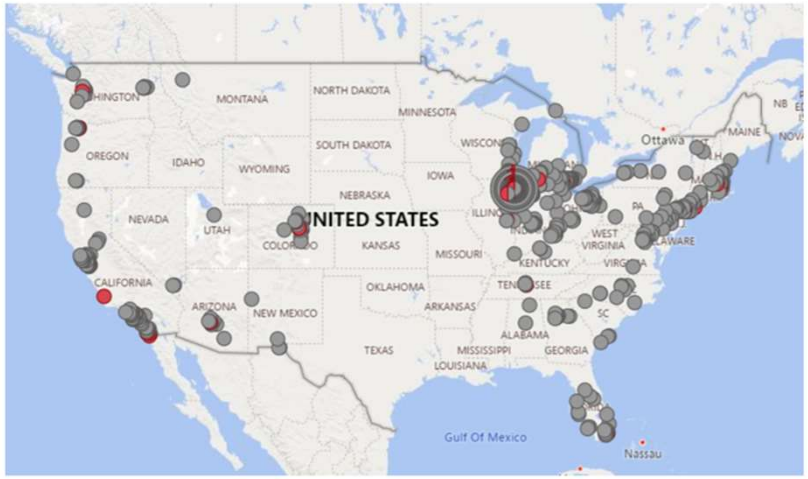
LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

Data Integrity - Examples

From Feb 2021

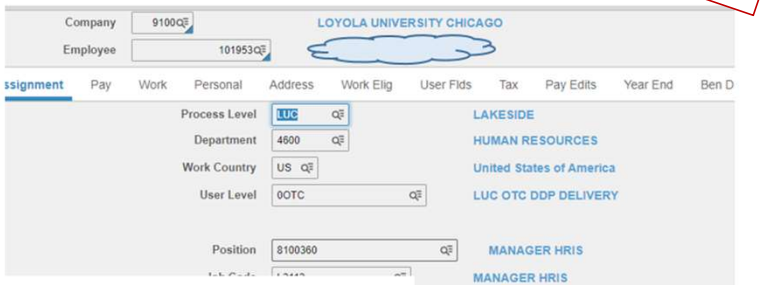
LOCUS

Bad Local Address



Lawson – Department

Human Resources: Sys & Process



Web Directory

Human Resources: Sys & Process

Lawson

Blank HI Role & Department

Tests by Week

Classification	HI_Role	Dept	Week starting on: 02/14/2021 (8)	Total
			27	27
FACULTY/STAFF	CONTRACTOR		14	14
	EMERITUS		1	1
	FACULTY		60	60
		Anthropology	2	2
		Applied Health Sciences	2	2
		Arrupe College	3	3
		Biology	19	19

LOYOLA UNIVERSITY CHICAGO

Preparing people to lead extraordinary lives

Data Integrity - Examples

From Feb 2021

Bad Data Components & Impacts

Data Component/Category	Impact Area
Incorrect/missing local-home address, supplemental address	Mailings, SHIELD Roster
Incorrect/missing emergency contact info	Situational
Incorrect/missing alternate-personal email address	Training follow-up
Incorrect/missing cell phone numbers	Contact, SHIELD Roster
Department/location mismatch	Training follow-up
Duplicate LIDs	Processing
Incorrect/outdated department/division names	Processing, Training follow-up
Incorrect/outdated supervisor hierarchy	Processing, Training follow-up
High Role inconsistencies	Processing, Assignments
Highest degree, preferred degree tracking and assignment	Processing
Faculty data	
faculty attributes, status, track, rank	Processing
part time versus adjunct versus full time	Processing, Assignments
source of truth	Processing
Grant information, difficulty tracking attributes across platforms	Processing

HI_Role	No LAWSON Birthdate	No LOCUS Birthdate	Birthday mismatch between IDM3/LUWARE and LAWSON	No Gender in LAWSON	No Gender in LOCUS	Gender mismatch between LAWSON and LOCUS	No LAWSON Address	No LOCUS local or permanent/ home address	No LAWSON home phone
STUDENT_WORKER	-	-	23	6	-	18	-	-	12
FACULTY	-	224	52	2	-	17	-	1,642	63
STAFF	-	189	41	20	11	8	-	1,101	93
NONE	-	1	-	-	1	-	-	1	-
	-	414	116	28	12	43	-	2,744	168

Counts of Poor Data Quality

LOYOLA UNIVERSITY CHICAGO

Preparing people to lead extraordinary lives

Data Governance & Integrity - Goals

From June 2021

- Advance the current Data Governance practices
- Establish Data Governance policies and procedures
- Assess the current state of demographic and contact information
- Document key source systems and dependencies
- List definitions of Data Quality components and items
- Describe a Data Quality approach
- Identify a Data Quality solution

Data Governance	***Data Quality/Integrity***
Data Governance is a collection of practices and processes which help to ensure the formal management of data assets within an organization	A Data Quality Program selects a set of data quality polices towards a specific goal or accomplishment

Initial Fields in Scope

From June 2021

Student, Faculty, Staff, NAP, Alumni, Parent - Demographic, Contact, & Identity informat

Name (First, Last)	Primary Role (HI Role) Student, Faculty, & Staff, Guest, Contractor
Preferred Name	
Parent Name	
Address – Permanent & Local	
Email (UVID)	
Date of Birth	
Phone - Home	
Phone - Mobile	
Identity	Employee ID (UVID) - Loyola ID (LID)
Department (if applicable)	
Supervisor (if applicable)	
Location (Student Worker, Faculty, Staff)	

Milestones

From June 2021

Phase	Milestone	Estimated Time Frame
Initiation	Internal Kickoff Meeting	Completed
Planning	Core Systems Owners – Introduction	Completed
	Data Flow Charts Reviews	Completed
	Scope Approval	June 2021
Execution	Data Life Cycle Flows	June-July 2021
	Data Quality Solution Approach	June-July 2021
	Draft – Quality Controls, Policies, Rules and Processes	July-August 2021
	Draft – Data Governance Maturity Model	July-August 2021
	Draft – Data Governance & Integrity Steering Structure	July-August 2021
	Business Glossary & Data Dictionary	July-August 2021
	Internal Reviews and Modifications	September 2021
	Stakeholders Reviews and Updates	September 2021
Close-out	Transition to Operational Model	October 2021

Progress Since June

- Researched best practice approaches including Gartner and Educause
- Engaged 2 Data Governance & Integrity consultants
  - Project Manager – Malle Kancherla, PMP, CSM, 20+ years of PM experience with data projects
  - Subject Matter Expert – Michael Gorecki, 10+ years of experience with data governance & data cleansing
- Conducted Analysis & Review Sessions
  - 38 Meetings & working sessions held
  - 7 Departments/Units engaged
    - (OIE, HR, Enrollment Management, Registrar, Advance, Faculty Admin, ITS)
  - 11 ITS staff interviewed
- 130 Deliverables Created
  - Meeting summaries, workflows, process docs, maturity models, proposals, etc.

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

New Resource

- Data Governance Manager
  - Partnered with David Slavsky in OIE to create the position
  - Group/Committee interview process
  - Jasmina Hoscheit (Jhoscheit@luc.edu) hired in November
    - Higher-Ed experience in Data Governance (Boston College)

- Assessed consultant deliverables
  - Data governance practices
  - Data quality life cycle, approach & controls
  - Data related policies, and procedures

- Identified additional key people, processes, and tools for growing the data governance program

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

Assessed Deliverables

Data Quality/Integrity

- Completed Data Quality & Integrity program suggested approaches and processes documentation.
- Produced lifecycle diagrams for impacted sourcing systems including, identity & access, student & alumni, online directory, faculty & staff, and guest access.
- Finalized data quality solution approach for demographic and contact info including addressing missing required data on forms i.e. cell phone numbers and local address.
- Established a data quality owner/contact list.

Data Governance

- Drafted data governance processes, approaches, program assumptions, and a maturity model.
- Recommended rules and definitions of impacted critical data elements for the future data dictionary and its related business glossary.
- Made metadata dictionary technical definitions, implementations and integrations suggestions.
- Assessed and proposed tools.

Data Governance & Integrity Steering Structure

- Drafted structure that replaces the BI Steering Committee

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

Milestone Progress

Phase	Milestone	Estimated Time Frame	Revised Time Frame
Initiation	Internal Kickoff Meeting	Completed	Completed
Planning	Core Systems Owners – Introduction	Completed	Completed
	Data Flow Charts Reviews	Completed	Completed
	Scope Approval	June 2021	Completed
Execution	Data Life Cycle Flows	June-July 2021	Completed
	Data Quality Solution Approach	June-July 2021	Completed
	Draft – Quality Controls, Policies, Rules and Processes	July-August 2021	Completed
New!	Finalize – Quality Controls, Policies, Rules and Processes	February-March 2022	February-March 2022
	Draft – Data Governance Maturity Model	July-August 2021	Completed
New!	Finalize – Data Governance Maturity Model	February-March 2022	February-March 2022
	Draft – Data Governance & Integrity Steering Structure	July-August 2021	**Draft Ready for Discussion**
	Business Glossary & Data Dictionary [Kickoff]	July-August 2021	February-March 2022
	Internal Reviews and Modifications	September 2021	April 2022
	Stakeholders Reviews and Updates	September 2021	April 2022
Close-out	Transition to Operational Model	October 2021	May 2022

DRAFT

Data Governance Committee Nominations

DRAFT

Function/Area	Member	Alternate	Key Source Systems	Data Type
Office of Institutional Effectiveness	Brian Erdman (Co-Chair)			
Data Governance	Jasmina Hoscheit (Co-Chair)			
Enrollment & Student Success	Tim Heuer		Slate	New Students
Registration & Records	Rita Vazquez	Susan Ries	LOCUS	Students & Academics/FERPA
Alumni & Giving	Charles Van Hecke	Matt Johnson	Advance	Alumni & Donors
Human Resources	Danielle Hanson		Lawson PeopleAdmin	Employees
Faculty Administration	Michelle Same	Michelle Pencyla	Faculty Information System(s) Interfolio	Faculty
Office of Institutional Effectiveness	Ping Tsui			IPEDS
Schools	TBD			School
Finance	Tracy Snowberger	Becky Gomez-Kline	Lawson	Financial
Information Technology Services	Tony Vavarutsos		Enterprise Data Warehouse	Enterprise
	Xiomara Franco		LUWARE LOCUS	Identity
	Jim Pardonek		Non-Associated Persons	Sponsored Guests
	Rejoice Jebamalaidass		Online Directory	Demographics
	Jon Fischer	Eric Killham	Active Directory UVID/email	Identity/Email

Next Steps

- Engage Sponsors/ITESC with regular program updates/status
  - Margaret Callahan – Provost & CAO
  - Teresa Krafcisin – Sr. Assoc. VP & Controller
  - Susan Malisch – VP & CIO
  - Winifred Williams – VP HR & CHRO
- Finalize Data Governance Committee structure
  - Partner with OIE to finalize, engage new leader
  - Obtain final approval from Sponsors
  - Establish meeting schedules
  - Launch committee
- Continuing to identify critical university systems to ensure the confidentiality, integrity and accessibility of data
  (Right Data, Right People, Right Time)
- Develop processes to collect all required data elements and integrate across systems (from initial *fields in scope* list)
- Creation of a knowledge repository, glossary and data dictionary

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

Agenda

HIPAA Compliant Teleconferencing

- J. Sibenaller

Data Governance & Integrity

- S. Malisch, J. Sibenaller

Project Portfolio Prioritization

- S. Malisch, J. Sibenaller

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives

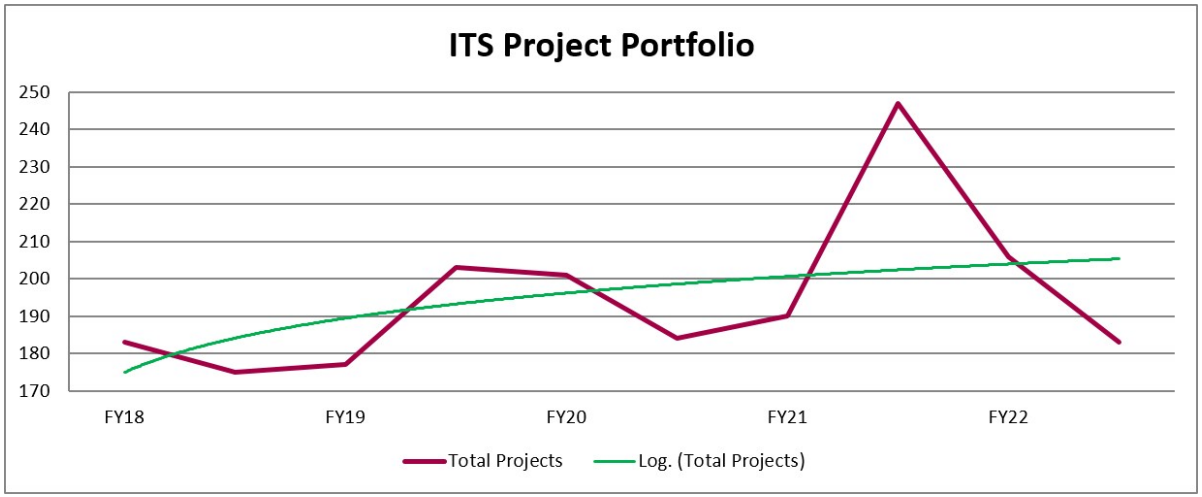
Plan of Record Tracking

POR Activity	Total Count	T-Shirt Sizing Breakdown						
		XX-Large	X-Large	Large	Medium	Small	X-Small	XX-Small
Original FY22 Q1-Q2 POR	**206**	16	16	44	79	47	3	1
Revised FY22 Q1-Q2 POR	**206**	18	16	43	78	47	3	1
New Projects Started	**201**	1	2	16	31	43	11	97
Final FY22 Q1-Q2 POR	**407**	19	18	59	109	90	14	98
Completed Projects	**(178)**	1	0	13	25	34	10	95
Forecasted Completed Projects	**(33)**	4	2	5	5	14	1	2
Duplicate/Canceled/Move to Ops	**(26)**	3	1	4	9	9	0	0
Rollover Projects	**170**	11	15	37	70	33	3	1
New Projects not Started	**13**	1	1	4	3	3	0	1
FY22 Q3-Q4 POR (Draft)	**183**	12	16	41	73	36	3	2
Net Change	**(23)**	**(4)**	**0**	**(3)**	**(6)**	**(11)**	**0**	**1**

LOYOLA UNIVERSITY CHICAGO 150

Project Sizing Trend

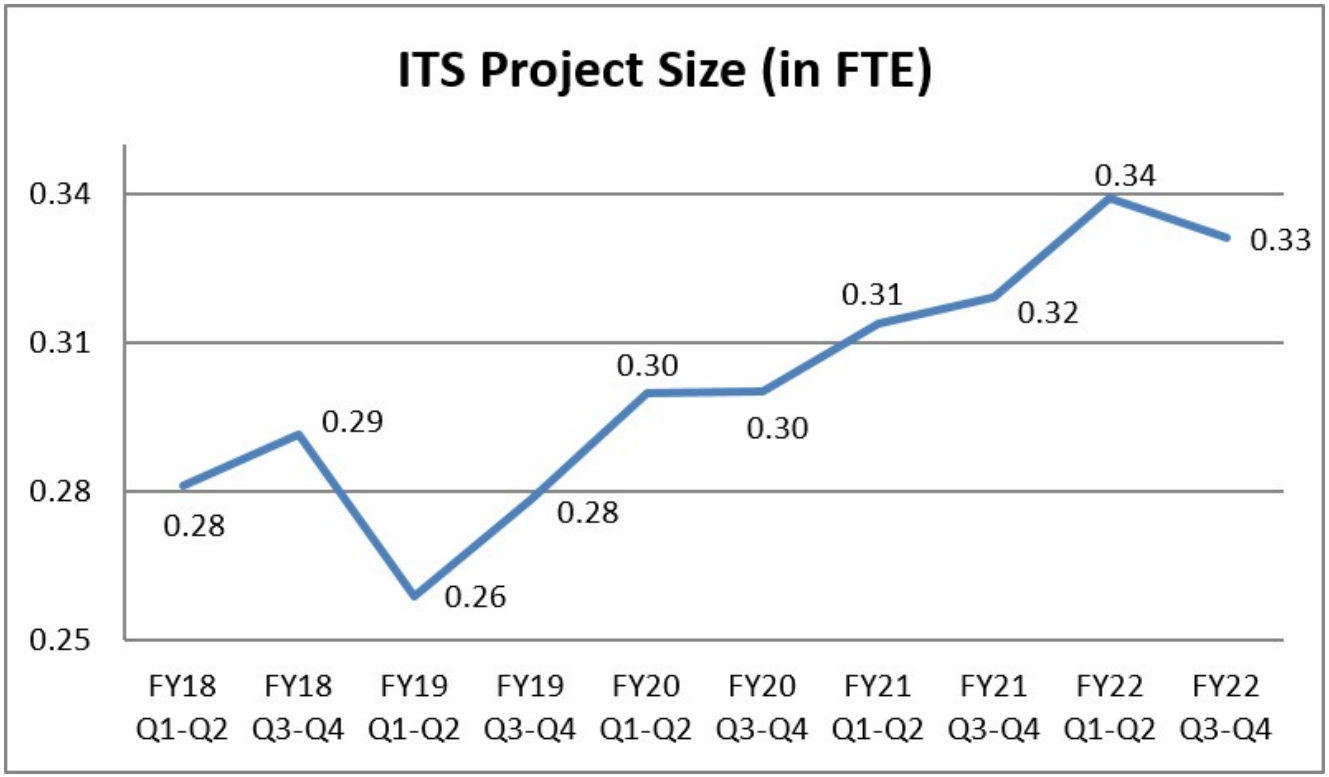
Portfolio Counts											
T-Shirt Sizing	Work Effort	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	FY20 Q3-Q4	FY21 Q1-Q2	FY21 Q3-Q4	FY22 Q1-Q2	FY22 Q3-Q4
TBD	TBD	0	0	0	0	0	0	0	0	0	0
XX-Small	< 3 Days	0	0	0	0	0	0	0	5	1	2
X-Small	3-5 Days	2	1	1	4	3	2	3	5	3	3
Small	5-30 Days	36	31	40	50	45	41	42	62	47	36
Medium	31-60 Days	96	92	94	96	97	86	83	93	79	73
Large	61-120 Days	34	36	31	35	34	36	40	46	44	41
X-Large	121-180 Days	15	15	11	18	22	19	22	18	16	16
XX-Large	>180 Days	0	0	0	0	0	0	0	18	16	12
	Portfolio Total	**183**	**175**	**177**	**203**	**201**	**184**	**190**	**247**	**206**	**183**



	Avg.	Min	Max	This Period
Portfolio	195	175	247	183

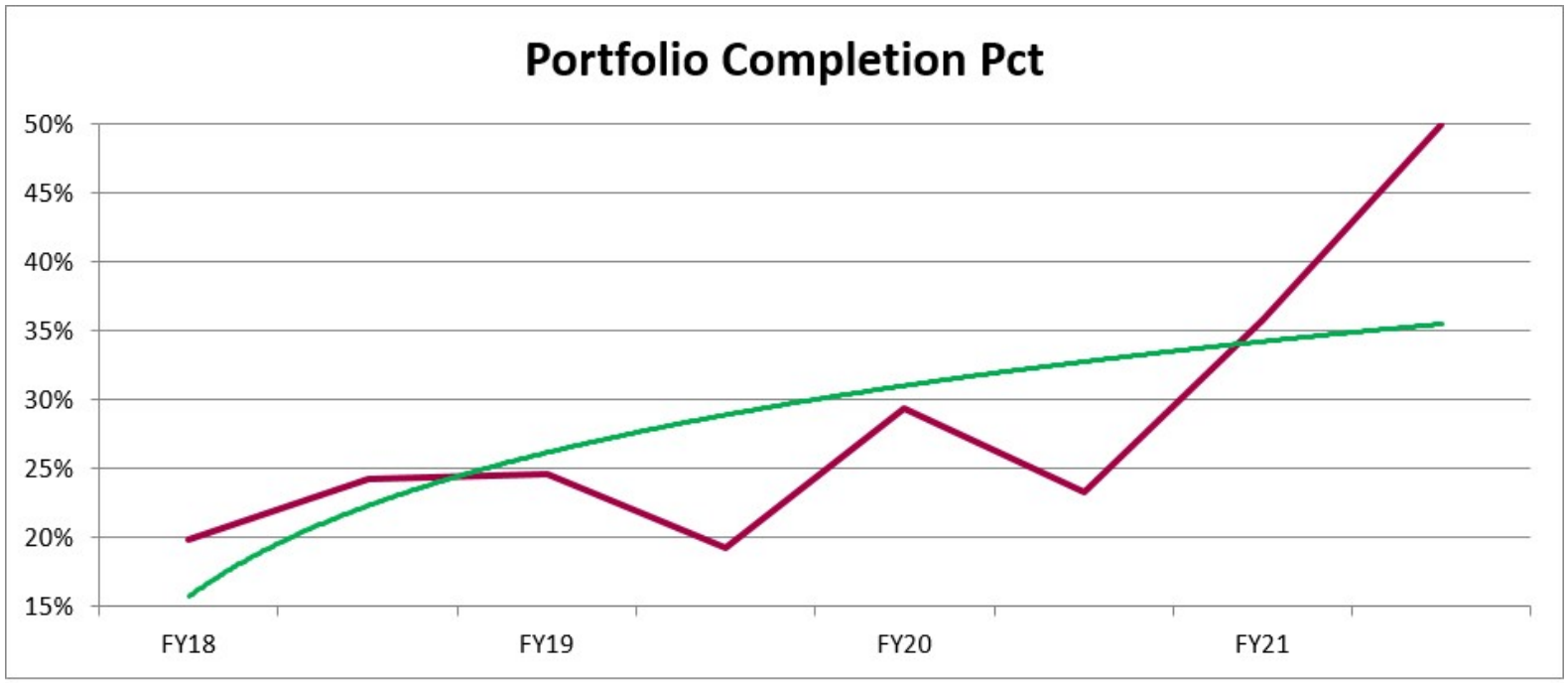
LOYOLA UNIVERSITY CHICAGO 150

Average Project Size



LOYOLA UNIVERSITY CHICAGO 150

Completed Project Forecast



178 projects complete

33 projects forecast to be complete

211 total completed this period

	Avg.	Min	Max	This Period
Completed Pct.	30%	19%	52%	52% (forecasted)

LOYOLA UNIVERSITY CHICAGO 150

Capacity Estimates

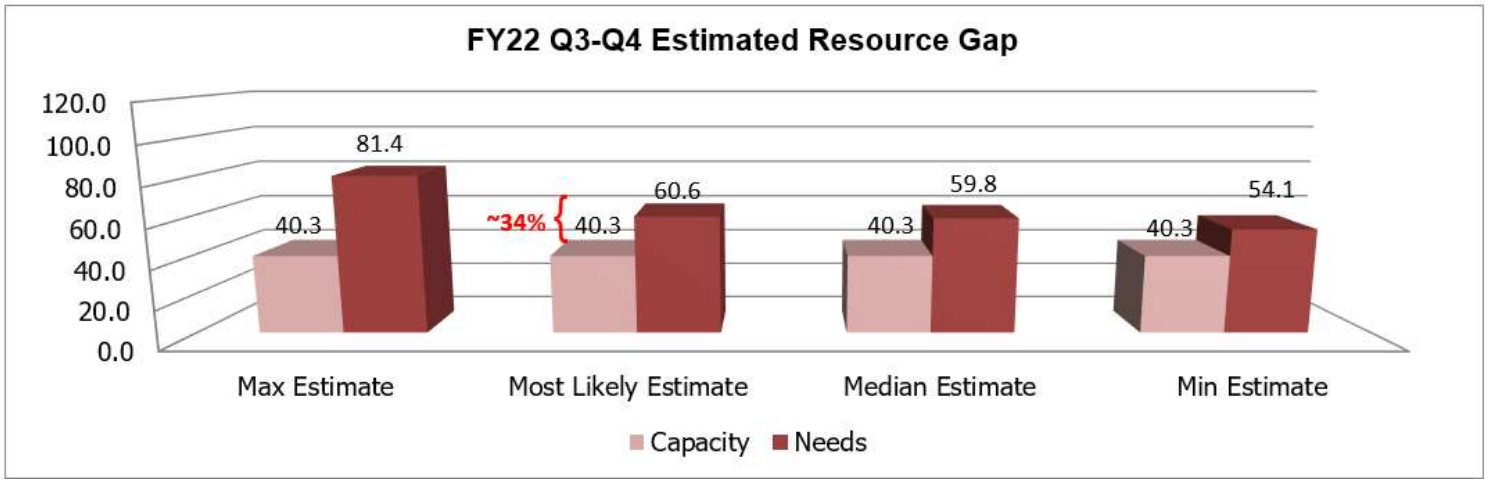
T-Shirt Sizing	Work Effort	Initial Project Count*	Project Effort** (FTE)
XX-Small	< 3 Days	2	0.01
X-Small	3-5 Days	3	0.04
Small	5-30 Days	36	3.2
Medium	31-60 Days	73	14.0
Large	61-120 Days	41	15.8
X-Large	121-180 Days	16	9.6
XX-Large	>180 Days	12	17.9
	Total	183	60.6

** snapshot as of 12/9/2021*
*** most likely scenario*

ITS Capacity/Resource Calculations (FTE)	
Full Time	119.0
Part time	2.1
Total FTE	121.1

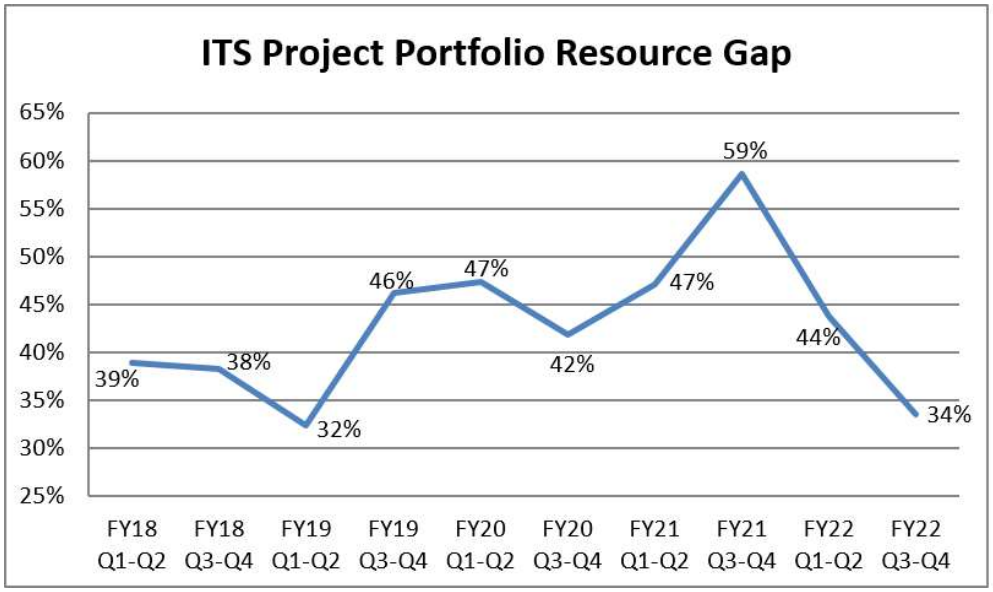
	Est. Effort Allocation	Est. Time Allocation	Most Likely Estimate Gap
Admin.	27.7	23%	34%
Support	49.2	41%	
COVID-19 Support***	3.9	3%	
Research	5.7	5%	
Projects	34.6	29%	
Total	121.1	100%	

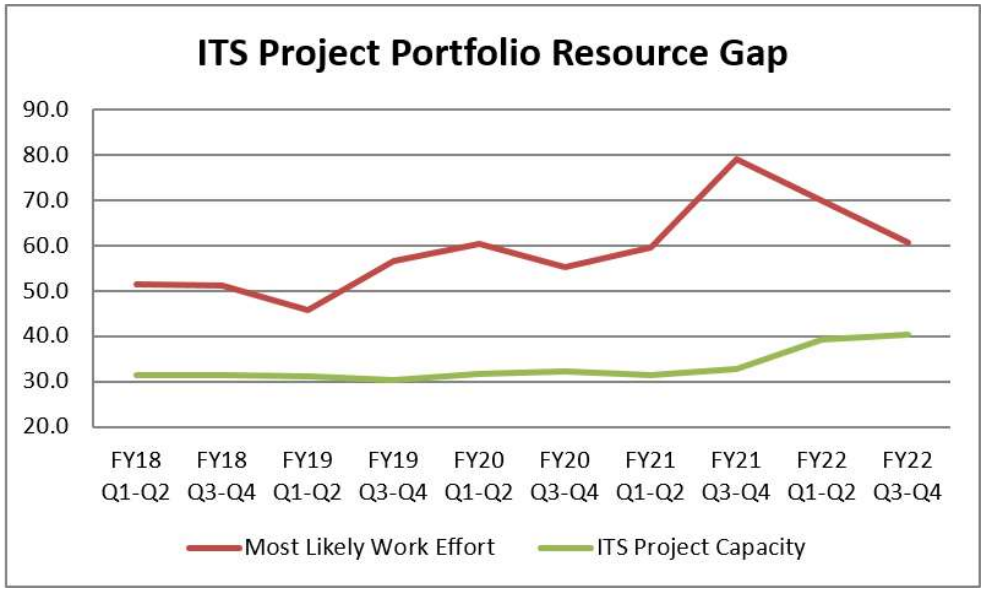
**** COVID-19 support reduced addt'l 20%*



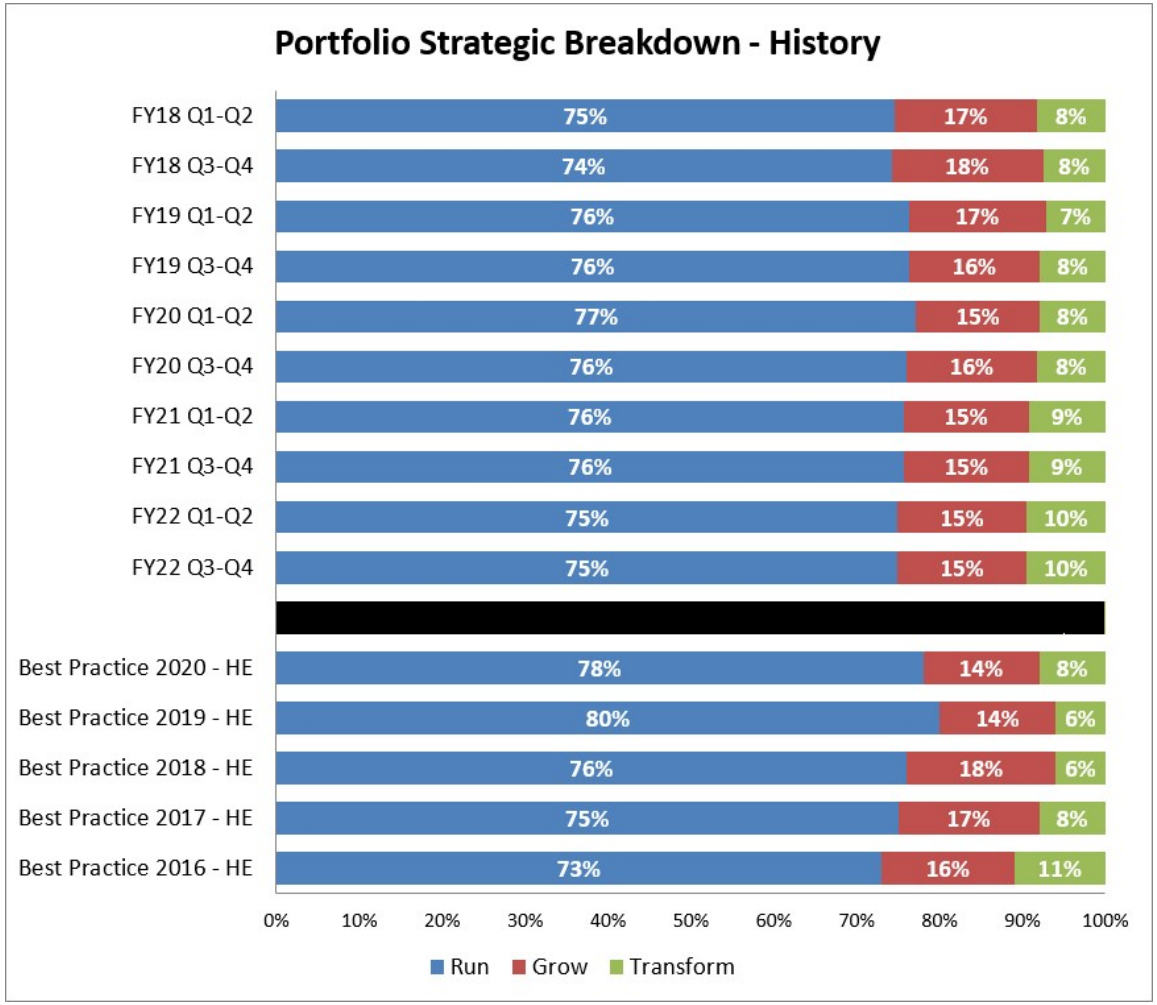
Portfolio Growth Details

	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	FY20 Q3-Q4	FY21 Q1-Q2	FY21 Q3-Q4	FY22 Q1-Q2	FY22 Q3-Q4	5 Year Avg
Portfolio Count	183	175	177	203	201	184	190	247	206	183	195
Portfolio Growth	-12%	-4%	1%	15%	-1%	-8%	3%	30%	8%	-26%	
Most Likely Work Effort	51.5	51.0	45.8	56.5	60.3	55.2	59.6	78.9	69.9	60.6	58.9
Most Likely Work Effort Growth	-16%	-1%	-11%	19%	6%	-9%	7%	24%	-13%	-15%	
ITS Project Capacity	31.5	31.5	31.0	30.4	31.7	32.1	31.5	32.7	39.3	40.3	33.2
ITS Project Capacity Growth	0%	0%	-2%	-2%	4%	1%	-2%	4%	17%	2%	
Estimated Resource Gap	39%	38%	32%	46%	47%	42%	47%	59%	44%	34%	44%





ITS Project Portfolio Impact



Run – Ongoing operations

Grow – Information systems and services to optimize performance

Transform – New technologies and processes that fundamentally promote change

Excludes research projects

LOYOLA UNIVERSITY CHICAGO 150

FY22 Q3-Q4 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	1-2	**LOCUS Enhancements (2)**	**Large**	**Active**	**Q4 FY22**	**Enterprise/Multiple**
A	1	FA - Annual Student Loan Acknowledgement	Medium	Active	Q4 FY22	Financial Assistance
A	2	Financial Aid - Loans/ Disbursements 2021-22 Aid Year	Large	Active	Q4 FY22	Financial Assistance
	3-5	**Information Security Program (3)**	**XXLarge**	**Active**	**Q3 FY23**	**Enterprise/Multiple**
A	3	High Security Lab Environment/Security Operations Center	Medium	Active	Q3 FY23	Information Technology Services
A	4	Broaden Use of SIEM Technologies	XXLarge	Active	Q1 FY23	Information Technology Services
A	5	Data Center Firewalls	XXLarge	Active	Q3 FY22	Information Technology Services
	6-11	**IT Disaster Recovery (5)**	**XXLarge**	**Hold**	**TBD**	**Enterprise/Multiple**
A	6	Disaster Recovery Planning	XLarge	Hold	Q2 FY23	Information Technology Services
A	7	Disaster Recovery - TouchNet Paypath/TPG	Small	Hold	TBD	Information Technology Services
A	8	Business Continuity for Departmental Staff	XXLarge	Hold	Q4 FY22	Information Technology Services
A	9	Network Services (Core) Disaster Recovery Plan	Medium	Hold	TBD	Information Technology Services
A	10	2022 DR Plan Review & Testing	XXLarge	Pending	Q4 FY23	Information Technology Services
A	11	ARMS 2020 Disaster Recovery Environment	Medium	Active	Q3 FY22	Information Technology Services
	12-15	**Enterprise Content Management (4)**	**Large**	**Hold**	**TBD**	**Enterprise/Multiple**
A	12	ECM - Electronic Document Retention	Large	Hold	TBD	Information Technology Services
A	13	Accounts Payable to Treasury/Cash Management - Foreign Invoices	Small	Hold	Q3 FY22	Accounts Payable
A	14	HSC - Faculty Admin	Medium	Hold	Q2 FY23	Faculty Administration
A	15	DocFinity webforms/automated workflows that perform transactions in LOCUS	Large	Pending	Q3 FY22	Registration & Records

FY22 Q3-Q4 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	16-22	**Business Intelligence/Data Warehouse Program (7)**	**XXLarge**	**Hold**	**TBD**	**Enterprise/Multiple**
A	16	Student Profile - Power BI	Large	Pending	TBD	Student Development - Office of VP
A	17	BI for Student Finance	XLarge	Hold	TBD	Finance-Office of VP-CFO
A	18	Develop an HR BI Dashboard, starting with key reports and metrics	XLarge	Active	Q3 FY22	Human Resources
A	19	Revenue to Expense Model - Version 4	XLarge	Pending	TBD	Finance-Office of VP-CFO
A	20	Financial Aid Suite of Power BI Dashboards	XLarge	Pending	TBD	Financial Assistance
A	21	Learning Analytics - Phase 3	Large	Active	Q3 FY22	Information Technology Services
A	22	Anti-Racism Initiative Dashboard	XLarge	Hold	TBD	Academic Affairs, Anti-Racism Initiative
	23	**Lawson/Kronos Enhancements (1)**	**Medium**	**Hold**	**TBD**	**Enterprise/Multiple**
A	23	Create an API to interface new employee data from the Workbright to Lawson	Medium	Hold	TBD	Financial Systems

FY22 Q3-Q4 ITS COVID-19 Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	A 24-27 B,M 50-52	**COVID-19 Related Projects (6)**	**XXLarge**	**Active**	**TBD**	**Enterprise/Multiple**
A	24	COVID-19 Emergency Response	XXLarge	Active	Q4 FY22	Enterprise/Multiple
A	25	GPEM-LOCUS Interface re-design	Large	Active	Q3 FY22	Enrollment Management
A	26	Tracking and Reporting for CARES Funds	Medium	Active	Q3 FY22	Controller's Office
A	27	WorkBright New Hire Onboarding Module Implementation	Medium	Active	Q3 FY22	Human Resources
B	50	Residence Life-Online Roommate Agreements	Small	Hold	TBD	Residence Life
M	51	LOCUS Immunizations Module - Add COVID-19	Medium	Active	Q3 FY22	Wellness Center
M	52	Health App Changes - Covid Booster Vaccine/HSC Flu Shot Compliance	Large	Active	Q3 FY22	Office of The President

COVID-19 projects represents

- 2.3 FTE total (effort)
- 6% of the ITS project capacity

COVID-19 support represents

- 3.9 FTE total (effort)
- Reduced by 20% over prior period
- 8% of the ITS support capacity

LOYOLA UNIVERSITY CHICAGO 150

FY22 Q3-Q4 ITS Ranked Separately Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
Ranked Separately	**A 28 B 53-55**	**Research Computing Services (4)**	**XXLarge**	**Active**	**Q4 FY22**	**Health Sciences/LUHS**
A	28	Define Technology Services Supporting Research	Large	Active	Q4 FY22	Information Technology Services
B	53	Examination of the Association of Unhealthy Substance Use	Medium	Active	Q1 FY22	Surgery
B	54	Use of ED in Predictive Models for Admissions to CCU	Small	Active	Q4 FY22	Parkinson
B	55	ICR Research DB Server Replacement	Small	Pending	Q3 FY22	Informatics HSC
Priority	**Row Nbr**	**Program Group**	**T-Shirt Sizing**	**Status**	**Est. Compl. (QTR)**	**Primary Customer**
Ranked Separately	**A 29-31 B 66-70**	**Stritch School of Medicine (8)**	**XXLarge**	**Active**	**TBD**	**Stritch School of Medicine**
A	29	Create Application Relationship Diagram for HSC Systems	Large	Active	Q3 FY22	Information Technology Services
A	30	Replace Admissions System	XXLarge	Active	Q3 FY23	Student Affairs - Admissions SSOM
A	31	Patient Centered Medicine 4	Small	Pending	TBD	Educational Affairs
B	66	LUHS Application Audit and Decommission	Medium	Active	Q3 FY22	Information Technology Services
B	67	Integration of HSC Room Scheduler with 25Live	Medium	Active	Q4 FY22	Facilities Office of VP
B	68	POCUS Test Development	Small	Active	Q3 FY22	Anesthesiology
B	69	Emergency Medicine Clerkship Performance Review	Small	Pending	TBD	Emergency Medicine
B	70	HSC Key Request Form	XSmall	Pending	TBD	Facilities (HSC)

Draft # FY22 Q3-Q4 ITS Project Prioritization Worksheet *Draft*

Tab	Row Nbr	Program Group	Proposed ITESC Ranking	Prior ITESC Ranking	PRB Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
	32-37	**LDE Consumable Experience (2)**				**XXLarge**	**Active**	**TBD**	**Enterprise/Multiple**
		Student Experience Lifecycle (4)				**Large**	**Active**	**TBD**	**Enterprise/Multiple**
Priority A	32	School Based CRM Pilot with Slate				Medium	Active	Q2 FY23	Parkinson/SON
Priority A	33	PeopleGrove Mentoring Platform - Central Hub				Medium	Active	Q3 FY22	Enterprise/Multiple
Priority A	34	PeopleGrove Mentoring Platform - SSOM Sub-Hub	**1**	**2**	**2**	Small	Active	Q3 FY22	Stritch School of Medicine
Priority A	35	PeopleGrove Mentoring Platform - School of Social Work Hub				Small	Pending	TBD	School of Social Work
Priority A	36	PeopleGrove Mentoring Platform - Parkinson Hub				Small	Pending	TBD	Parkinson
Priority A	37	PeopleGrove Mentoring Platform - School of Nursing Hub				Small	Pending	TBD	School of Nursing
Priority A	38	ITS Portal Pilot				Medium	Hold	Q3 FY22	Information Technology Services
Priority A	39	LDE Digital Experience: O365 Application Portal Pilot				XXLarge	Pending	TBD	Enterprise/Multiple
	40-47	**Faculty Administration Re-Architecture Strategy-FARS (8)**				**XXLarge**	**Active**	**Q1 FY23**	**Provost's Office**
Priority A	40	Faculty Administration Re-Architecture Strategy-FARS				XXLarge	Active	Q1 FY23	Provost's Office
Priority A	41	Faculty Salary Planning				Large	Active	Q1 FY23	Provost's Office
Priority A	42	FARS Phase II Requirements and Future State Design				Large	Active	Q2 FY23	Provost's Office
Priority A	43	Faculty Activity Reporting (replaces Digital Measures)	**2**	**3**	**3**	XLarge	Active	Q1 FY23	Provost's Office
Priority A	44	LSC Electronic PT Faculty Contracts				Medium	Active	Q3 FY22	Provost's Office
Priority A	45	Process Review of the Badge UVID and Badge Creation				Medium	Active	Q3 FY22	Provost's Office
Priority A	46	SSRs in HR queue for Information				Medium	Active	Q3 FY22	Human Resources
Priority A	47	Validate & Streamline Existing Workflow, Reports & Tools				Large	Active	Q3 FY22	Provost's Office

Draft # FY22 Q3-Q4 ITS Project Prioritization Worksheet *Draft*

Tab	Row Nbr	Program Group	Proposed ITESC Ranking	Prior ITESC Ranking	PRB Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
	48-49	**LDE Foundation: Collaboration and Security (2)**	**3**	**1**	**1**	**XLarge**	**Active**	**TBD**	**Information Technology Services**
Priority A	48	Identity and Access Management Enhancements				XLarge	Active	Q4 FY22	Information Technology Services
Priority A	49	Enterprise Mobility Management				Medium	Hold	TBD	Information Technology Services
Priority A	50	EAB Navigate - Phase II	**4**	**4**	**4**	Large	Active	Q3 FY22	Academic Advising and Services
Priority A	51	Data Governance & Integrity	**5**	**7**	**5**	XXLarge	Active	Q4 FY22	Enterprise/Multiple
Priority A	52	Advancement CRM RFP	**6**	**6**	--	Large	Active	Q2 FY23	Advancement
Priority A	**53-56**	**LDE Transformation: Digital Assistant/Chatbots (4)**	**7**	**5**	**6**	**XLarge**	**Active**	**TBD**	**Enterprise/Multiple**
Priority A	53	LUie Chatbot: Reporting, Governance, and Support				Large	Active	Q3 FY22	Information Technology Services
Priority A	54	Chatbot - Human Resources				Medium	Pending	TBD	Human Resources
Priority A	55	Chatbot - Academic Advising				Medium	Hold	TBD	Sullivan Center for Student Services
Priority A	56	Chatbot - Finance				Large	TBD	TBD	Financial Systems
Priority A	57	CourseLeaf Course and Curriculum Management Implementation	**8**	---	**7**	Large	Pending	TBD	Registration & Records
Priority A	58	Analysis of Mental Health App Requested by SGLC	**9**	---	**8**	Medium	Active	Q3 FY22	Wellness Center/SGLC
Priority A	**59-60**	**Travel Mgmt Services (2)**	**10**	**10**	**9**	**Large**	**Active**	**TBD**	**Enterprise/Multiple**
Priority A	59	Travel & Expense Management				Large	Hold	TBD	Controller's Office
Priority A	60	Travel Management Implementation (Egencia)				Large	Active	Q4 FY22	Controller's Office
Priority A	61	Compliance Governance via the Learning Hub	**11**	---	**10**	Large	Active	Q3 FY22	Controller's Office
Priority A	62	Financial Aid Award Letter Processes - Aid Year 2023	**12**	---	**11**	Medium	Active	Q4 FY22	Financial Assistance
Priority A	63	Review and Evaluate Proposed Research Administration Solutions	**13**	**18**	**12**	XXLarge	Pending	TBD	Provost's Office
Priority A	64	Financial Reporting Security (FRS) Enhancement	**14**	---	**15**	Medium	Pending	TBD	Financial Systems

Draft # FY22 Q3-Q4 ITS Project Prioritization Worksheet *Draft*

Tab	Row Nbr	Program Group	Proposed ITESC Ranking	Prior ITESC Ranking	PRB Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
Priority A	65	Updates to Commencement 2022 Survey	**15**	---	---	Small	Active	Q3 FY22	Provost's Office
Priority A	66	Implement Graduway to Enhance Alumni Giving and Engagement	**16**	---	**17**	Medium	Active	Q3 FY22	Development & Donor Services
Priority A	67	Automate HSC Parking/ID Processes	**17**	**12**	**13**	Medium	Active	Q3 FY22	School of Nursing
Priority A	68	Energy Management, Compliance, Mobile Enablement - Phase III (Archibus)	**18**	---	**16**	XLarge	Pending	TBD	Facilities- Office of VP
Priority A	69	Athletics Compliance System Replacement	**19**	---	**18**	Large	Pending	Q4 FY22	Athletics

2022 ITESC Schedule

February 24, 2022 - Thursday, 10:00 AM-12:00 PM
- TBD

April 28, 2022 - Thursday, 10:00 AM-12:00 PM
- TBD

June 16, 2022 - Thursday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization

August 18, 2021 - Thursday, 10:00 AM-12:00 PM
- TBD

October 20, 2021 - Tuesday, 10:00 AM-12:00 PM
- TBD

December 13, 2021 - Tuesday, 10:00 AM-12:00 PM
- Project Portfolio Prioritization

LOYOLA UNIVERSITY CHICAGO
Preparing people to lead extraordinary lives