ITS Executive Steering Committee (ITESC)

Agenda and Materials – September 20, 2017

Technology@Loyola
INFORMATION TECHNOLOGY AND SERVICES
LOYOLA UNIVERSITY CHICAGO

Agenda

Business Intelligence Subcommittee

- S. Malisch

Academic Technology Service Change Requests

- B. Montes

Student System Upgrade

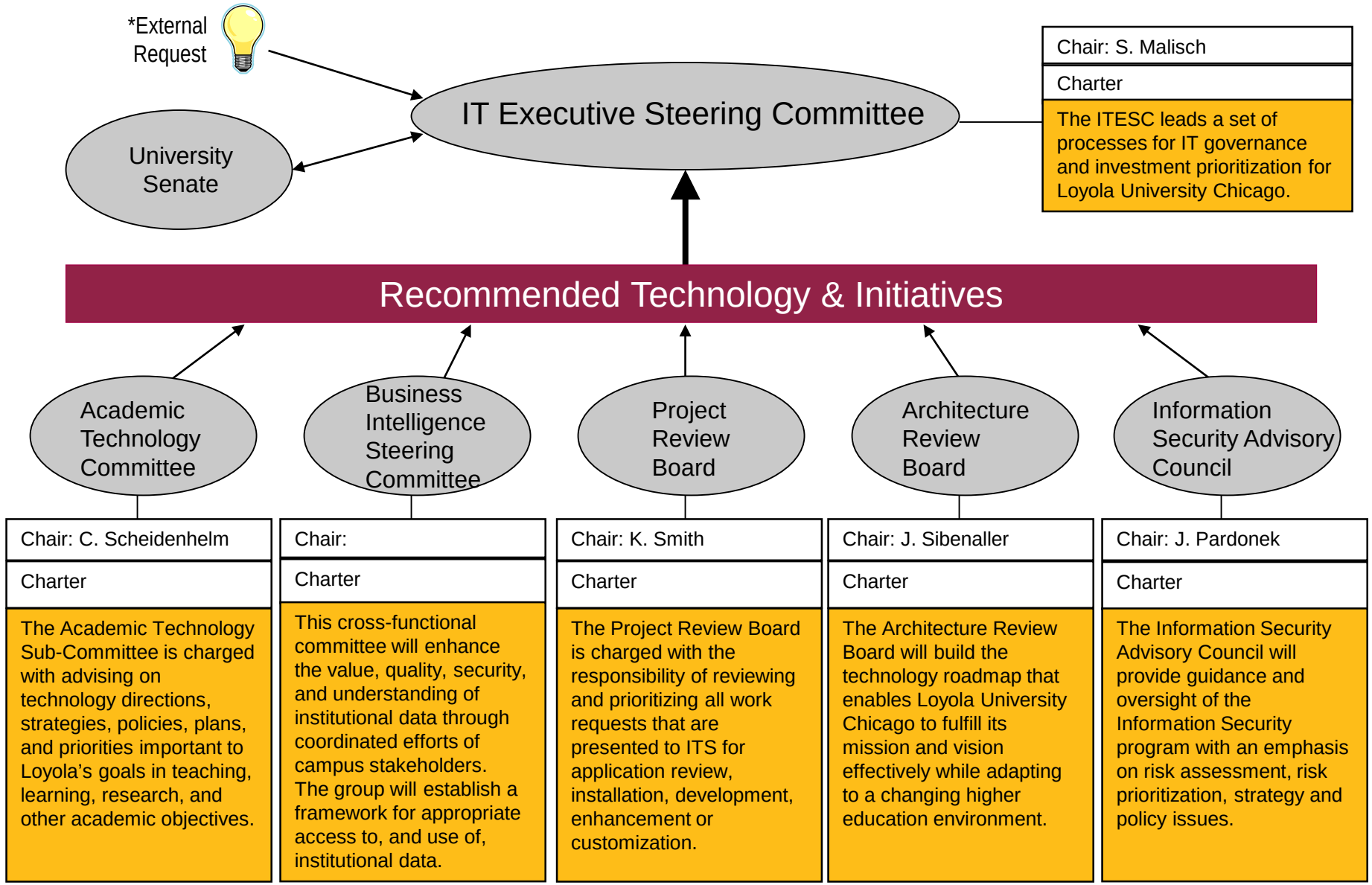
- K. Smith

Mobile Device Strategy

- D. Vonder Heide, J. Sibenaller

anywhere anytime accessLUC

ITESC Structure & Inputs



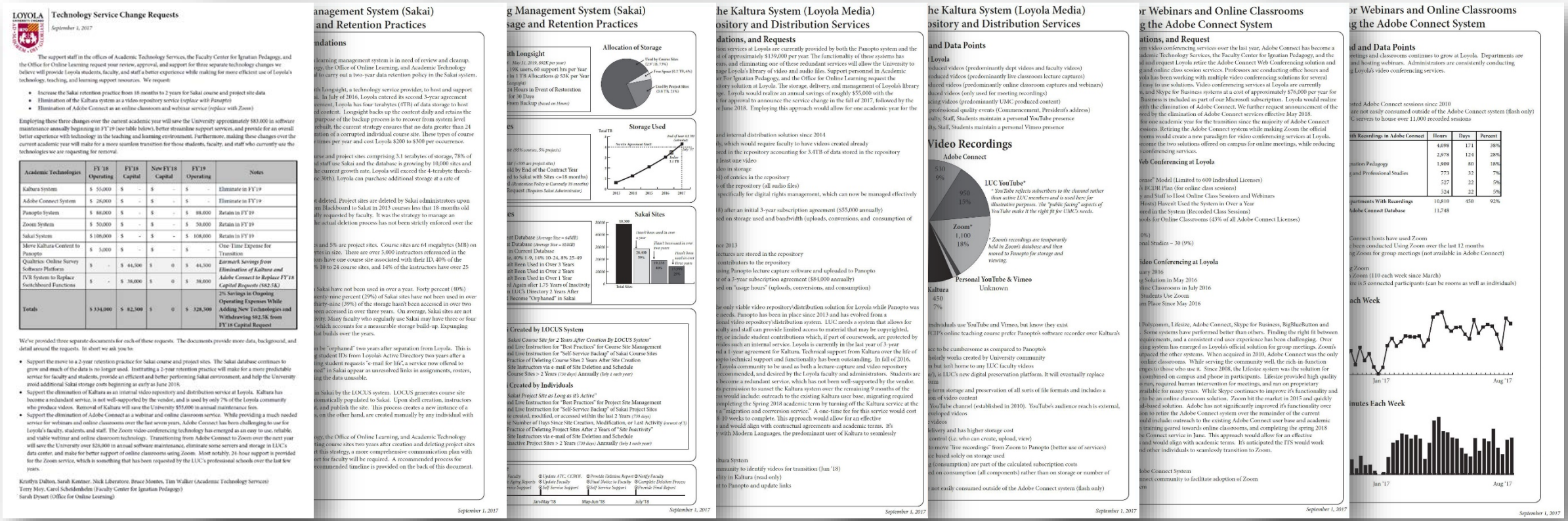
Academic Technology Service Change Requests

September 2017

LOYOLA UNIVERSITY CHICAGO 1870 AD MAJOREM DEI GLORIAM
Preparing people to lead extraordinary lives

Technology Service Change Requests

September 20, 2017



Technology Service Change Requests

September 1, 2017

The support staff in the offices of Academic Technology Services, the Faculty Center for Ignatian Pedagogy, and the Office for Online Learning request your review, approval, and support for three separate technology changes we believe will provide Loyola students, faculty, and staff a better experience while making for more efficient use of Loyola's technology, teaching, and learning support resources. We request:

- Increase the Sakai retention practice from 18 months to 2 years for Sakai course and project site data
- Elimination of the Kaltura system as a video repository service (*replace with Panopto*)
- Elimination of Adobe Connect as an online classroom and webinar service (*replace with Zoom*)

Employing these three changes over the current academic year will save the University approximately $83,000 in software maintenance annually beginning in FY'19 (see table below), better streamline support services, and provide for an overall better experience with technology in the teaching and learning environment. Furthermore, making these changes over the current academic year will make for a more seamless transition for those students, faculty, and staff who currently use the technologies we are requesting for removal.

Academic Technologies	FY'18 Operating	FY'18 Capital	New FY'18 Capital	FY'19 Operating	Notes
Kaltura System	$ 55,000	$ -	$ -	$ -	Eliminate in FY'19
Adobe Connect System	$ 28,000	$ -	$ -	$ -	Eliminate in FY'19
Panopto System	$ 88,000	$ -	$ -	$ 88,000	Retain in FY'19
Zoom System	$ 50,000	$ -	$ -	$ 50,000	Retain in FY'19
Sakai System	$ 108,000	$ -	$ -	$ 108,000	Retain in FY'19
Move Kaltura Content to Panopto	$ 3,000	$ -	$ -	$ -	One-Time Expense for Transition
Qualtrics Online Survey Software Platform	$ -	$ 44,500	$ 0	$ 44,500	*Earmark Savings from Elimination of Kaltura and Adobe Connect to Replace FY'18 Capital Requests ($82.5K)*
IVR System to Replace Switchboard Functions	$ -	$ 38,000	$ 0	$ 38,000	
Totals	**$ 334,000**	**$ 82,500**	$ 0	**$ 328,500**	**2% Savings in Ongoing Operating Expenses While Adding New Technologies and Withdrawing $82.5K from FY'18 Capital Request**

We've provided three separate documents for each of these requests. The documents provide more data, background, and detail around the requests. In short we ask you to:

- Support the move to a 2-year retention practice for Sakai course and project sites. The Sakai database continues to grow and much of the data is no longer used. Instituting a 2-year retention practice will make for a more predictable service for faculty and students, provide an efficient and better performing Sakai environment, and help the University avoid additional Sakai storage costs beginning as early as June 2018.
- Support the elimination of Kaltura as an internal video repository and distribution service at Loyola. Kaltura has become a redundant service, is not well-supported by the vendor, and is used by only 7% of the Loyola community who produce videos. Removal of Kaltura will save the University $55,000 in annual maintenance fees.
- Support the elimination of Adobe Connect as a webinar and online classroom service. While providing a much needed service for webinars and online classrooms over the last seven years, Adobe Connect has been challenging to use for Loyola's faculty, students, and staff. The Zoom video conferencing technology has emerged as an easy to use, reliable, and viable webinar and online classroom technology. Transitioning from Adobe Connect to Zoom over the next year will save the University over $28,000 in annual software maintenance, eliminate some servers and storage in LUC's data center, and make for better support of online classrooms using Zoom. Most notably, 24-hour support is provided for the Zoom service, which is something that has been requested by the LUC's professional schools over the last few years.

Kristhy Dalton, Sarah Kentner, Nick Liberatore, Bruce Montes, Tim Walker (Academic Technology Services)
Terry Moy, Carol Scheidenhelm (Faculty Center for Ignatian Pedagogy)
Sarah Dysart (Office for Online Learning)

anagement System (Sakai) and Retention Practices

ndations

learning management system is in need of review and cleanup. ogy, the Office of Online Learning, and Academic Technology d to carry out a two-year data retention policy in the Sakai system.

th Longsight, a technology service provider, to host and support i. In July of 2016, Loyola entered its second 3-year agreement ement, Loyola has four terabytes (4TB) of data storage to host ed content. Longsight backs up the content daily and retains the purpose of the backup process is to recover from system level rebuilt, the current strategy ensures that no data greater than 24 ation of a corrupted individual course site. These types of course times per year and cost Loyola $200 to $300 per occurrence.

arse and project sites comprising 3.1 terabytes of storage, 78% of d staff use Sakai and the database is growing by 10,000 sites and he current growth rate, Loyola will exceed the 4-terabyte thresh- ic 30th). Loyola can purchase additional storage at a rate of

t deleted. Project sites are deleted by Sakai administrators upon m Blackboard to Sakai in 2013 courses less that 18-months old lly requested by faculty. It was the strategy to manage an he actual deletion process has not been strictly enforced over the

s and 5% are project sites. Course sites are 61 megabytes (MB) on rtes in size. There are over 5,000 instructors referenced in the ors have one course site associated with their ID, 40% of the % 10 to 24 course sites, and 14% of the instructors have over 25

Sakai have not been used in over a year. Forty percent (40%) enty-nine percent (29%) of Sakai sites have not been used in over hirty-nine (39%) of the storage hasn't been accessed in over two een accessed in over three years. On average, Sakai sites are not ity. Many faculty who regularly use Sakai may have three or four which accounts for a measurable storage build-up. Expunging nal builds over the years.

n be "orphaned" two years after separation from Loyola. This is g student IDs from Loyola's Active Directory two years after a ing student requests "e-mail for life", a service now offered to ed" in Sakai appear as unresolved links in assignments, rosters, ng the data unusable.

in Sakai by the LOCUS system. LOCUS generates course site tomatically populated to Sakai. Upon shell creation, instructors , and publish the site. This process creates a new instance of a s, on the other hand, are created manually by any individual with

gy, the Office of Online Learning, and Academic Technology ting course sites two years after creation and deleting project sites rt this strategy, a more comprehensive communication plan with rt for faculty will be required. A recommended process for ecommended timeline is provided on the back of this document.

September 1, 2017

g Management System (Sakai) sage and Retention Practices

ith Longsight

May 31, 2019, 882K per year)
19K users, 60 support hrs per Year
in 1 TB Allocations @ 83K per Year
Longsight)
24 Hours in Event of Restoration
for 30 Days
From Backup (based on Hours)

Allocation of Storage

es

(95% courses, 5% projects)

(~500 are project sites)
old by End of the Contract Year
ed to Sakai with Sites <=18 months)
(Retentive Policy is Currently 18 months)
Request (Requires Sakai Administrator)

Storage Used

es

nt Database *(Average Size = 64MB)*
t Database *(Average Size = 85MB)*
in Current Database
s, 40%: 1-9, 14%: 10-24, 8%: 25-49
n't Been Used in Over 3 Years
n't Been Used in Over 2 Years
n't Been Used in Over 1 Year
l Again after 1.75 Years of Inactivity
n LUC's Directory 2 Years After
Become "Orphaned" in Sakai

Sakai Sites

Created by LOCUS System

Sakai Course Site for 2 Years After Creation By LOCUS System"
and Live Instruction for "Best Practices" for Course Site Management
and Live Instruction for "Self-Service Backup" of Sakai Course Sites
Practice of Deleting Course Sites 2 Years After Site Creation
Site Instructors via e-mail of Site Deletion and Schedule
Course Sites > 2 Years *(730 days)* Annually *(July 1 each year)*

Created by Individuals

Sakai Project Site as Long as it's Active"
and Live Instruction for "Best Practices" for Project Site Management
and Live Instruction for "Self-Service Backup" of Sakai Project Sites
e created, modified, or accessed within the last 2 Years *(730 days)*
e Number of Days Since Site Creation, Modification, or Last Activity *(newest of 3)*
Practice of Deleting Project Sites After 2 Years of "*Site Inactivity*"
Site Instructors via e-mail of Site Deletion and Schedule
Inactive Project Sites > 2 Years *(730 days)* Annually *(July 1 each year)*

September 1, 2017

he Kaltura System (Loyola Media) ository and Distribution Services

dations, and Requests

ion services at Loyola are currently provided by both the Panopto system and the t of approximately $139,000 per year. The functionality of these systems has ars, and eliminating one of these redundant services will allow the University to age Loyola's library of video and audio files. Support personnel in Academic r For Ignatian Pedagogy, and the Office for Online Learning request the tory solution at Loyola. The storage, delivery, and management of Loyola's library ge. Loyola would realize an annual savings of roughly $55,000 with the for approval to announce the service change in the fall of 2017, followed by the e June 2018. Employing this approach would allow for one academic year for the

nd internal distribution solution since 2014
ty, which would require faculty to have videos created already
ored in the repository accounting for 3.4TB of data stored in the repository
least one video
deos in storage
4) of entries in the repository
of the repository (all audio files)
pecifically for digital rights management, which can now be managed effectively

8) after an initial 3-year subscription agreement ($55,000 annually)
ed on storage used and bandwidth (uploads, conversions, and consumption of

ice 2013
lectures are stored in the repository
contributors to the repository
ising Panopto lecture capture software and uploaded to Panopto
e of a 3-year subscription agreement ($84,000 annually)
ed on "usage hours" (uploads, conversions, and consumption)

he only viable video repository/distribution solution for Loyola while Panopto was e needs. Panopto has been in place since 2013 and has evolved from a nal video repository/distribution system. LUC needs a system that allows for ulty and staff can provide limited access to material that may be copyrighted, ty, or include student contributions which, if part of coursework, are protected by vides such an internal service. Loyola is currently in the last year of 3-year d a 1-year agreement for Kaltura. Technical support from Kaltura over the life of opto technical support and functionality has been outstanding. In fall of 2016, Loyola community to be used as both a lecture-capture and video repository recommended, and desired by the Loyola faculty and administrators. Students are become a redundant service, which has not been well-supported by the vendor. s permission to sunset the Kaltura system over the remaining 9 months of ss would include: outreach to the existing Kaltura user base, migrating required mpacting the Spring 2018 academic term by turning off the Kaltura service at the a "migration and conversion service." A one-time fee for this service would cost 8-10 weeks to complete. This approach would allow for an effective and would align with contractual agreements and academic terms. It's with Modern Languages, the predominant user of Kaltura to seamlessly

ltura System
manuity to identify videos for transition (Jun '18)
ily in Kaltura (read only)
t to Panopto and update links

September 1, 2017

he Kaltura System (Loyola Media) ository and Distribution Services

nd Data Points

Loyola
duced videos (predominantly dept videos and faculty videos)
oduced videos (predominantly live classroom lecture captures)
duced videos (predominantly online classroom captures and webinars)
duced videos (only used for meeting recordings)
cing videos (predominantly UMC produced content)
professional quality events (Commencement, President's address)
ulty, Staff, Students maintain a personal YouTube presence
ty, Staff, Students maintain a personal Vimeo presence

Video Recordings

Adobe Connect

LUC YouTube*

** YouTube reflects subscribers to the channel rather than active LUC members and is used here for illustrative purposes. The "public facing" aspects of YouTube make it the right fit for UMC's needs.*

** Zoom's recordings are temporarily held in Zoom's database and then moved to Panopto for storage and viewing.*

Personal YouTube & Vimeo
Unknown

Kaltura
450
7%

ndividuals use YouTube and Vimeo, but know they exist
CIP's online teaching course prefer Panopto's software recorder over Kaltura's

ce to be cumbersome as compared to Panopto's
olarly works created by University community
n but isn't home to any LUC faculty videos
e), is LUC's new digital preservation platform. It will eventually replace
orm
-term storage and preservation of all sorts of file formats and includes a
on of video content
YouTube channel (established in 2010). YouTube's audience reach is external,
eveloped videos
videos
elivery and has higher storage cost
control (i.e. who can create, upload, view)
o move "live recordings" from Zoom to Panopto (better use of services)
ce based solely on storage used
g (consumption) are part of the calculated subscription costs
ed on consumption (all components) rather than on storage or number of

not easily consumed outside of the Adobe Connect system (flash only)

September 1, 2017

r Webinars and Online Classrooms g the Adobe Connect System

ations, and Request

om video conferencing services over the last year, Adobe Connect has become a demic Technology Services, the Faculty Center for Ignatian Pedagogy, and the d and request Loyola retire the Adobe Connect Web Conferencing solution and g and online class session services. Professors are conducting office hours and ola has been working with multiple video conferencing solutions for several leasy to use solutions. Video conferencing services at Loyola are currently , and Skype for Business systems at a cost of approximately $76,000 per year for Business is included as part of our Microsoft subscription. Loyola would realize ith the elimination of Adobe Connect. We further request announcement of the ved by the elimination of Adobe Connect services effective May 2018. for one academic year for the transition since the majority of Adobe Connect ssions. Retiring the Adobe Connect system while making Zoom the official oms would create a new paradigm for video conferencing services at Loyola. come the two solutions offered on campus for online meetings, while reducing conferencing services.

eb Conferencing at Loyola

ense" Model (Limited to 600 Individual Licenses)
BCDR Plan (for online class sessions)
and Staff to Host Online Class Sessions and Webinars
Hosts) Haven't Used the System in Over a Year
ered in the System (Recorded Class Sessions)
ools for Online Classrooms (43% of all Adobe Connect Licenses)

9%)
nal Studies – 30 (9%)

ideo Conferencing at Loyola

uary 2016
g Solution in May 2016
line Classrooms in July 2016
Students Use Zoom
n Place Since May 2016

Polycomm, Lifesize, Adobe Connect, Skype for Business, BigBlueButton and Some systems have performed better than others. Finding the right fit between quirements, and a consistent end user experience has been challenging. Over ing system has emerged as Loyola's official solution for group meetings. Zoom's upaced the other systems. When acquired in 2010, Adobe Connect was the only online classrooms. While serving the community well, the rich in-function nges to those who use it. Since 2008, the Lifesize system was the solution for combined on campus and phone in participants. Lifesize provided high quality run, required human intervention for meetings, and ran on proprietary ailable for many years. While Skype continues to improve it's functionality and to be an online classroom solution. Zoom hit the market in 2015 and quickly d-based solution. Adobe has not significantly improved it's functionality over on to retire the Adobe Connect system over the remainder of the current ould include: outreach to the existing Adobe Connect user base and academic training geared towards online classrooms, and completing the spring 2018 e Connect service in June. This approach would allow for an effective and would align with academic terms. It's anticipated the ITS would work d other individuals to seamlessly transition to Zoom.

obe Connect System
nect community to facilitate adoption of Zoom
m

September 1, 2017

r Webinars and Online Classrooms g the Adobe Connect System

d and Data Points

ettings and classrooms continues to grow at Loyola. Departments are are not easily consumed outside of the Adobe Connect system (flash only) C servers to house over 11,000 recorded sessions

h Recordings in Adobe Connect	Hours	Days	Percent
	4,098	171	38%
	2,978	124	28%
uation Pedagogy	1,909	80	18%
g and Professional Studies	773	32	7%
	527	22	5%
	524	22	5%
partments With Recordings	10,810	450	92%
dobe Connect Database	11,748		

Connect hosts have used Zoom
been conducted Using Zoom over the last 12 months
g Zoom for group meetings (not available in Adobe Connect)

g Zoom
Zoom (110 each week since March)
re is 5 connected participants (can be rooms as well as individuals)

ach Week

inutes Each Week

September 1, 2017

Proposed...

- **Changes**
  1. **Enforce a Two-Year Retention Practice for Sakai Course and Project Site Data (*was 18-months*)**
  2. **Eliminate Kaltura System as a Video Repository Service (*use Panopto as a Replacement*)**
  3. **Eliminate Adobe Connect as an Online Classroom and Webinar Service (*use Zoom as a Replacement*)**
- **Timing**
  - **Complete Changes Over the Course of the Current Academic Year:**
    1. **Allow Faculty to Plan for Transition**
    2. **Lessen the Impact on LUC Community**
    3. **Align to Budget Cycles**

Proposed...

- **Financial Impact**

1. **Save 2% in Ongoing Annual Maintenance**
2. **Fund New Technology Requests While Reducing FY'18 Captial Request by $82.5K**
3. **Avoid Additional $3K in FY'18 Storage Expenses**

Academic Technologies	FY '18 Operating	FY'18 Capital	New FY'18 Capital	FY'19 Operating	Notes
Kaltura System	$ 55,000	$ -	$ -	$ -	Eliminate in FY'19
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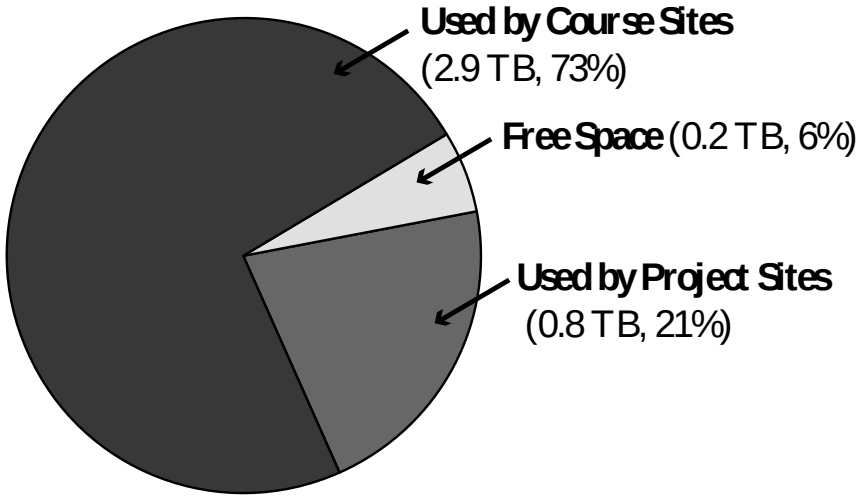
Zoom System	$ 50,000	$ -	$ -	$ 50,000	Retain in FY'19
Sakai System	$ 108,000	$ -	$ -	$ 108,000	Retain in FY'19
Move Kaltura Content to Panopto	$ 5,000	$ -	$ -	$ -	One-Time Expense for Transition
Qualtrics: Online Survey Software Platform	$ -	$ 44,500	$0.00	$ 44,500	***Earmark Savings from Elimination of Kaltura and Adobe Connect to Replace FY'18 Capital Requests ($82.5K)***
IVR System to Replace Switchboard Functions	$ -	$ 38,000	$0.00	$ 38,000	
Totals	**$ 334,000**	**$ 82,500**	**$0.00**	**$ 328,500**	**2% Savings in Ongoing Operating Expenses While Adding New Technologies and Withdrawing $82.5K from FY'18 Capital Request**

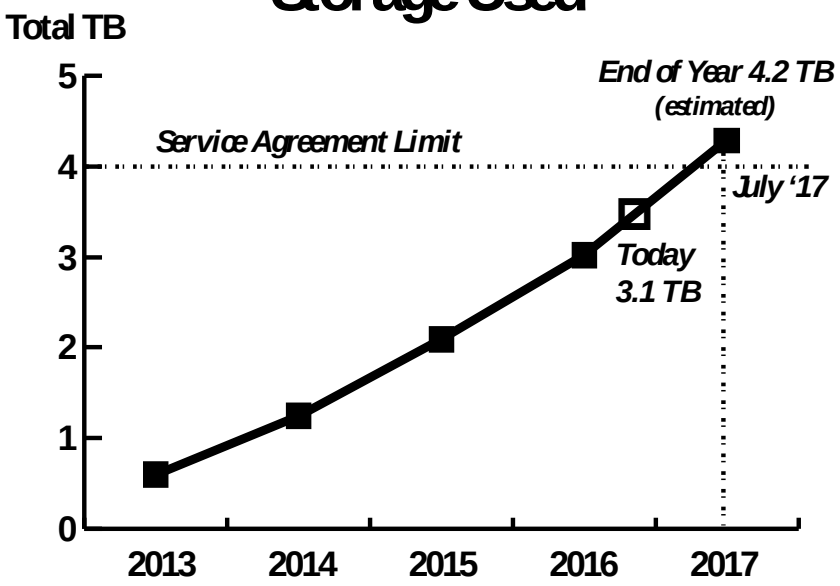
Employ a Two-Year Retention Practice for Sakai Course and Project Site Data

- Clean-up Unused Data
- Provide Better Defined and Efficient Services in the Learning Management System (LMS)
- Avoid $3,000 in Additional Annual Expenses in Storage Costs in 2018
  (current Sakai Maintenance is $108K annually)

Allocation of Storage

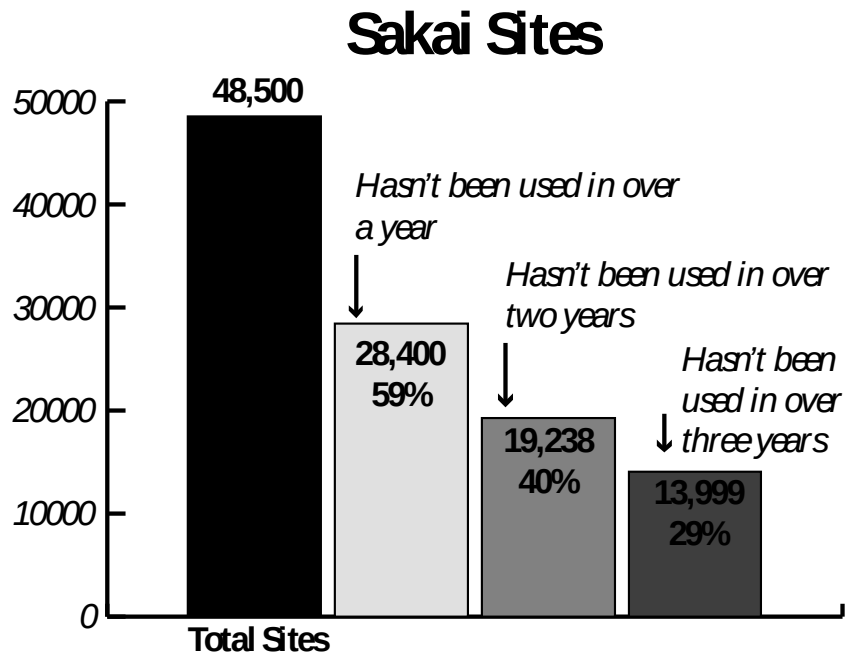


Storage Used



Employ a Two-Year Retention Practice for Sakai Course and Project Site Data

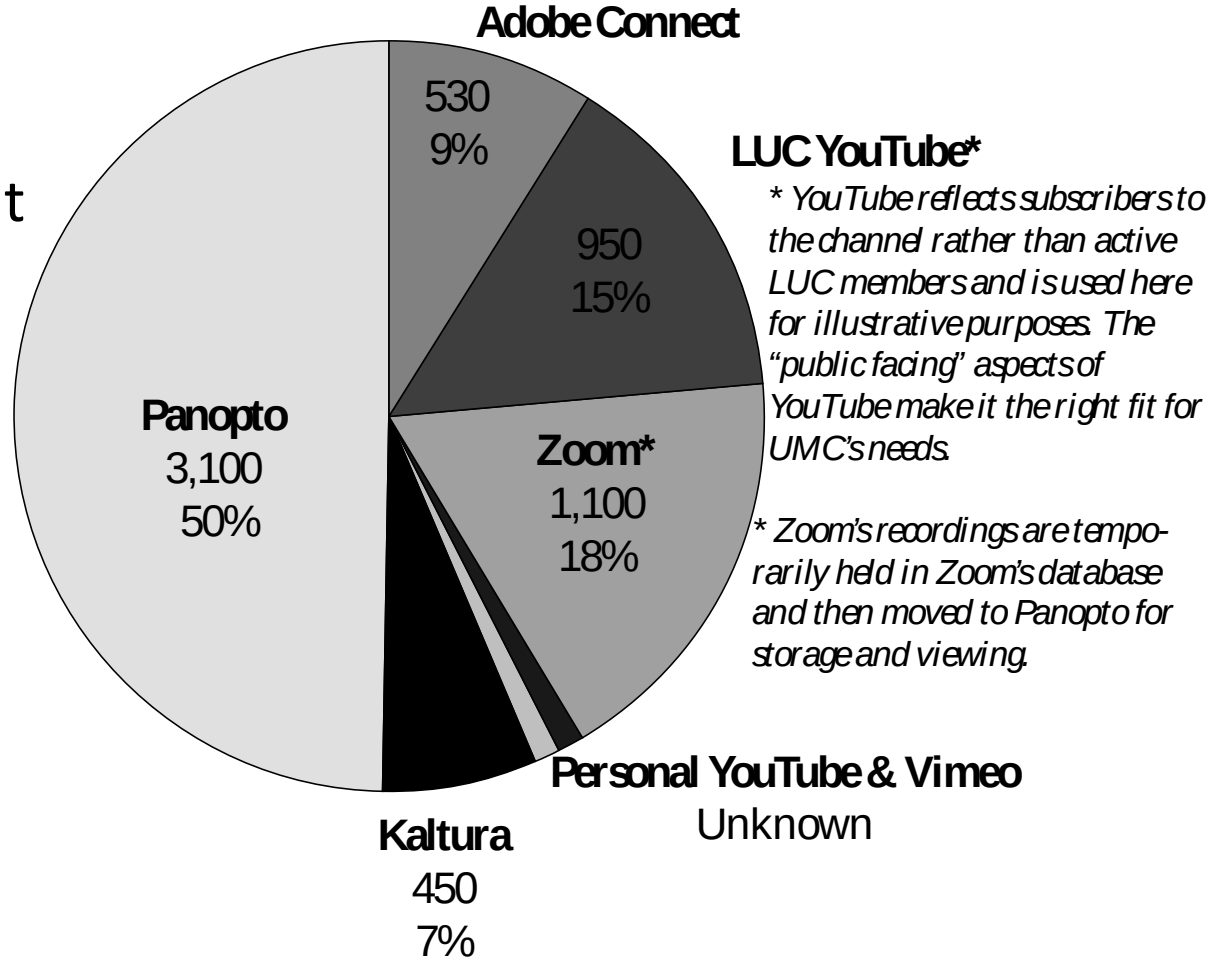
- 40% of Sites Have Not Been Used in Over Two Years
- Growing by 1-TB Per Year – Avoid Additional Expenses
- Provide Faculty Nine Month Notice
  - Identify Semester Break as “Clean-Up” Month as an Opportunity to Market, Advertise, and Plan for Change
  - Encourage Content Review, Clean-up, and Assistance
- Better Align Student Data With ID\Email Policies



Eliminate Kaltura System as a Video Repository Service

- Remove a Redundant Service
- Panopto Can Now Meet and Exceed Current Services *(current Panopto Maintenance is $88K annually)*
- Cease Business With a Non-Value Add Business Partner
- "Right Fit" Video Services at Loyola
- Save $55,000 in Annual Maintenance Expenses

Locations of LUC Video Recordings

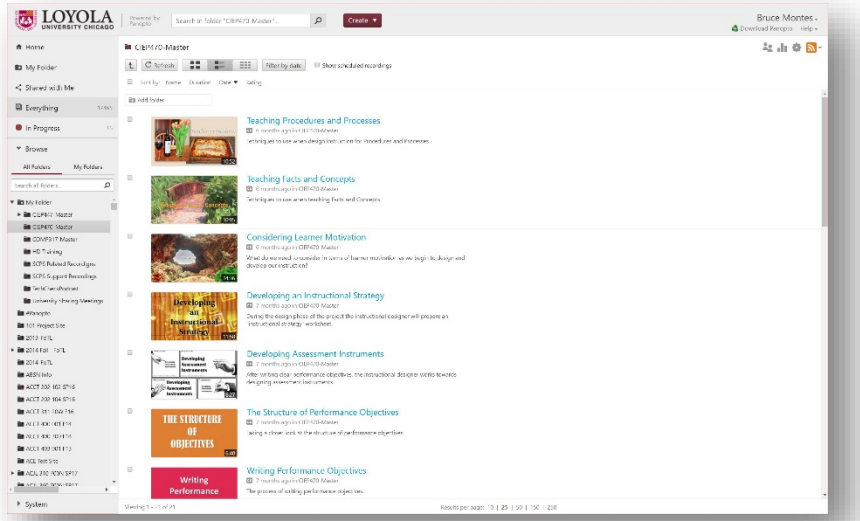


** YouTube reflects subscribers to the channel rather than active LUC members and is used here for illustrative purposes. The "public facing" aspects of YouTube make it the right fit for UMC's needs.*

** Zoom's recordings are temporarily held in Zoom's database and then moved to Panopto for storage and viewing.*

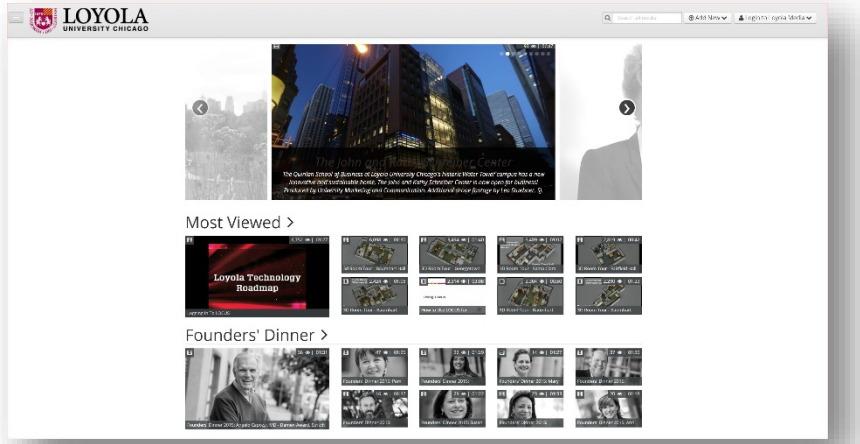
Eliminate Kaltura System as a Video Repository Service

- 13 Individuals Account for Over 70% All Entries in Kaltura
- Modern Languages Accounts for 34% of the Items in Kaltura (audio files)
- Panopto is More broadly Used and Adopted and Can Fully Support Kaltura Functions
- With Transition
    1. Content Remains Same – Moves to Panopto and Links Updated
    2. For a one-time Fee ($5K) Panopto Will Migrate Content for LUC



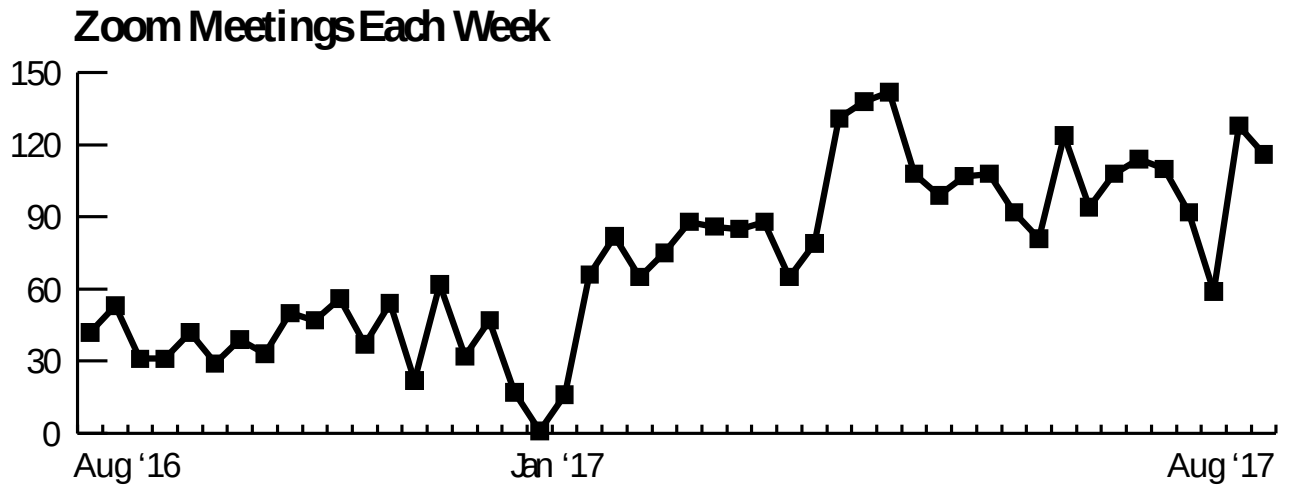
Panopto

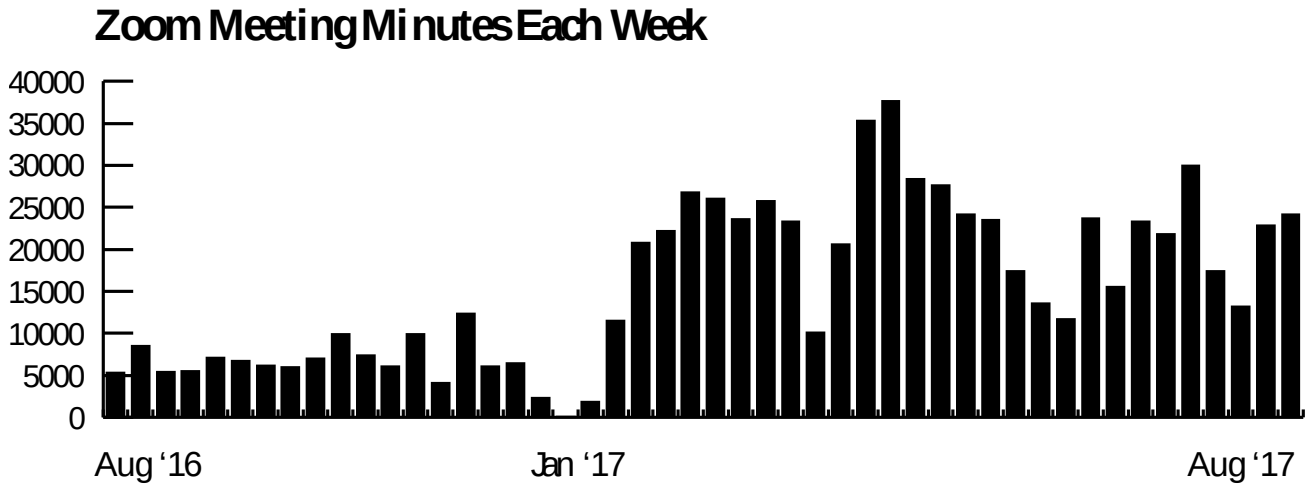
Kaltura



Eliminate Adobe Connect as an Online Classroom and Webinar Service

- Consolidate Video Conferencing, Webinar, and Online Classroom Technologies to “Best Fit”
- Replace With Existing Zoom Service
- Make for a Better Online Experience for Loyola’s Students, Faculty, and Staff
- Save $28,000 in Annual Maintenance Expenses





Eliminate Adobe Connect as an Online Classroom and Webinar Service

- Professional Schools (Law, QSOB, SCPS, Nursing) Account for 43% of Adobe Connect Use
- Targeted Campaign With These Schools to Help With Transition *(Use Zoom in Spring)*
- Faculty Have Expressed Continued Frustration With Adobe Connect
- Limited Licensing

Top Departments with Recordings in Adobe Connect	Hours	Days	Percent
School of Business	4,098	171	38%
Computer Science	2,978	124	28%
Faculty Center for Ignation Pedagogy	1,909	80	18%
School of Continuing and Professional Studies	773	32	7%
Chemistry	527	22	5%
Bioethics	524	22	5%
Totals for Top Six Departments With Recordings	10,810	450	92%
Total Recordings in Adobe Connect Database	11,748		

"Switching to Zoom for my summer online course was such a great decision due to the increased functionality for student-to-student interaction in Zoom, I will never go back to Adobe Connect for synchronous sessions." -
Patrick Daubenmire, Associate Professor, Chemistry Undergraduate Program Director

Zoom…

- Is Easier to Use
- Is Better Performing
- Offers 24-Hour End User Support
- Can Support Adobe Connect Functionality

Proposed Schedule...

October '17 – Dec '17

- Work with Committees
- Work with Individuals
- "Sakai Clean-Up" Month Dec

January-May '18

- Delete Content
- Migrate Content
- Transition Remaining Individuals to New Systems
- "Shift to Zoom" Semester

May'18 - June '18

- Execute Archive Practices
- Sunset Kaltura
- Sunset Adobe Connect

Academic Technology Service Change Requests

August 2017

LOYOLA UNIVERSITY CHICAGO 1870 AD MAJOREM DEI GLORIAM
Preparing people to lead extraordinary lives

Agenda

Business Intelligence Subcommittee

- S. Malisch

Change Management for Academic Technologies

- B. Montes

Student System Upgrade

- K. Smith

Mobile Device Strategy

- D. Vonder Heide, J. Sibenaller

anywhere anytime accessLUC

Student System Upgrade Project Overview

- Move from Oracle Campus Solutions (CS) 9.0 to Oracle CS 9.2
  - Requisite component upgrades
  - Work began July 2016
  - Target go-live December 2017 (Final Date TBD)
- Phased Approach
  - Technical Changes First
  - Functional Improvements

Project Objectives

- Stay current with Campus Solutions (CS) and People Tools (PT) software versions to receive support from Oracle. (Extended support for CS 9.0 will end December 2019)
- Enables implementation of added functional and technology features.
  - PUM (PeopleSoft Update Manager) New selective adoption of new features vs. applying mandatory, incremental bundles updates.
  - Support for new user interface (i.e. FLUID) Navigation and Pages

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Why Do We Care?

- Selective Adoption of New Functionality and Regulatory Changes, Enabling Reduced Maintenance Timeframe
- Enables Up-to-date Self-service Features for Students, Faculty and Staff
  - Mobile Responsive Capability
  - Contemporary Look and Feel
- Retirement of Older Technology (e.g. Crystal Reports)

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Scope

- **Phase I** (Primarily technical)
  - Complete Pre-requisite Projects
    - Oracle, Application, Development Tools, Portal
  - Upgrade LOCUS Student Information System
  - Functional Testing
- **Phase II** (Begins After Phase I Functional Testing)
  - Added Flexibility and Adaptable User Interface and Navigation
  - New Business Process for Selective Adoption
  - Review of Current LUC Customizations

    (e.g. LUC Parent Guest to Oracle New Delegated Access)

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Upgrade Project Team

Project Team Members

Team / Area	Functional Lead	Technical Lead
Admissions - Undergraduate	Timothy Carroll	Michael Martin
Bursar	Thomas Catania	Dave Kessler, John McGivney
Enrollment Systems Research & Reporting	Tim Heuer, Lisa Gierich	Caroline Mwangi, Ivan Siap
Graduate Enrollment Management	Ronald Martin	Michael Martin
Financial Aid	Tobyn Friar	Caroline Mwangi, Ivan Siap
Registration and Records	Clare Korinek, Diane Hullinger	Xiomara Franco, Mark Reich
Registration and Records – Academic Advisement	Shannon Levi	Xiomara Franco, Greg Biskoski
Registration and Records – Campus Community	Kris Daggett	Dave Kessler, John McGivney
Registration and Records – Class Scheduling	Stacey Lind	Ivan Siap, Xiomara Franco
Registration and Records – Transfer Credit	Thomas Stahnke, Joyce Norwood	Greg Biskoski, Mark Reich
Student Financials	Rebecca Gomez	Dave Kessler, John McGivney
Project Management Team	Dave Kessler, Maria Muñoz, Xiomara Franco	

Leadership Team Members

Organization	Organizational Member
Executive Sponsor	John Pelissero (Provost), David Prasse (Vice Provost), Jo Beth D'Agostino (Vice Provost)
Chief Information Officer	Susan Malisch (ITS)
Director	Clare Korinek (Registration and Records), Kevin Smith (ITS)
ITS Management	Charlotte Pullen (Database & Middleware), Larry Adams (App Dev)
R&R Management	Diane Hullinger, Kris Daggett

Project Schedule – Phase 1 (Technical)

Upgrade Project Pre-requisites
July '16 – Jan '17

- Research on what and how to upgrade
- Crystal Report Retire
- Student refund change
- Create initial PSS projects

Install New Release
Feb '17 – May '17

- New Release CS 9.2 PT & 8.55.xx)
- Portal (iHub) PT 8.55.xx
- Evaluate Change Management and Testing tool
- Elasticsearch in TST environment

Test Move to Production
May '17 – Dec '17

- Phase 2 starts
- Prepare training and documentation
- Functional training
- Multiple Iterations of Move to Production (MTP)

Final Move to Production
January 2018

- Final MTP
- Go Live
- Phase 2 continues

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Upgrade Phases

Initial Pass – one time process

The initial pass is defined as the process of merging your existing production database with the new release software. In the process you preserve and reapply existing customizations made to delivered objects.

Test Move(s) to Production – repeated as necessary

The test move(s) to production are defined as the process of merging the data from a new copy of your existing production database with the new initial pass database software which now includes customizations.

Final Move to Production - one time process

The final move to production includes freezing the production database of any further enhancements. At this time you merge your data from the production database with the software from the latest test move to production.

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Constraints / Risks

- Acclimating Project Schedule Across All Involved Departments
- Concurrent Projects, Maintenance, and Support
- Aggressive Project Schedule
- Transactional Systems (LOCUS and Subsidiary Systems) will be unavailable during the actual cutover (max of 4 days)
- Limited Implementation Windows Due to:
  - Registration
  - Start of School
  - FA Packaging
  - Billing
  - Etc.

What's Coming?

Phase II

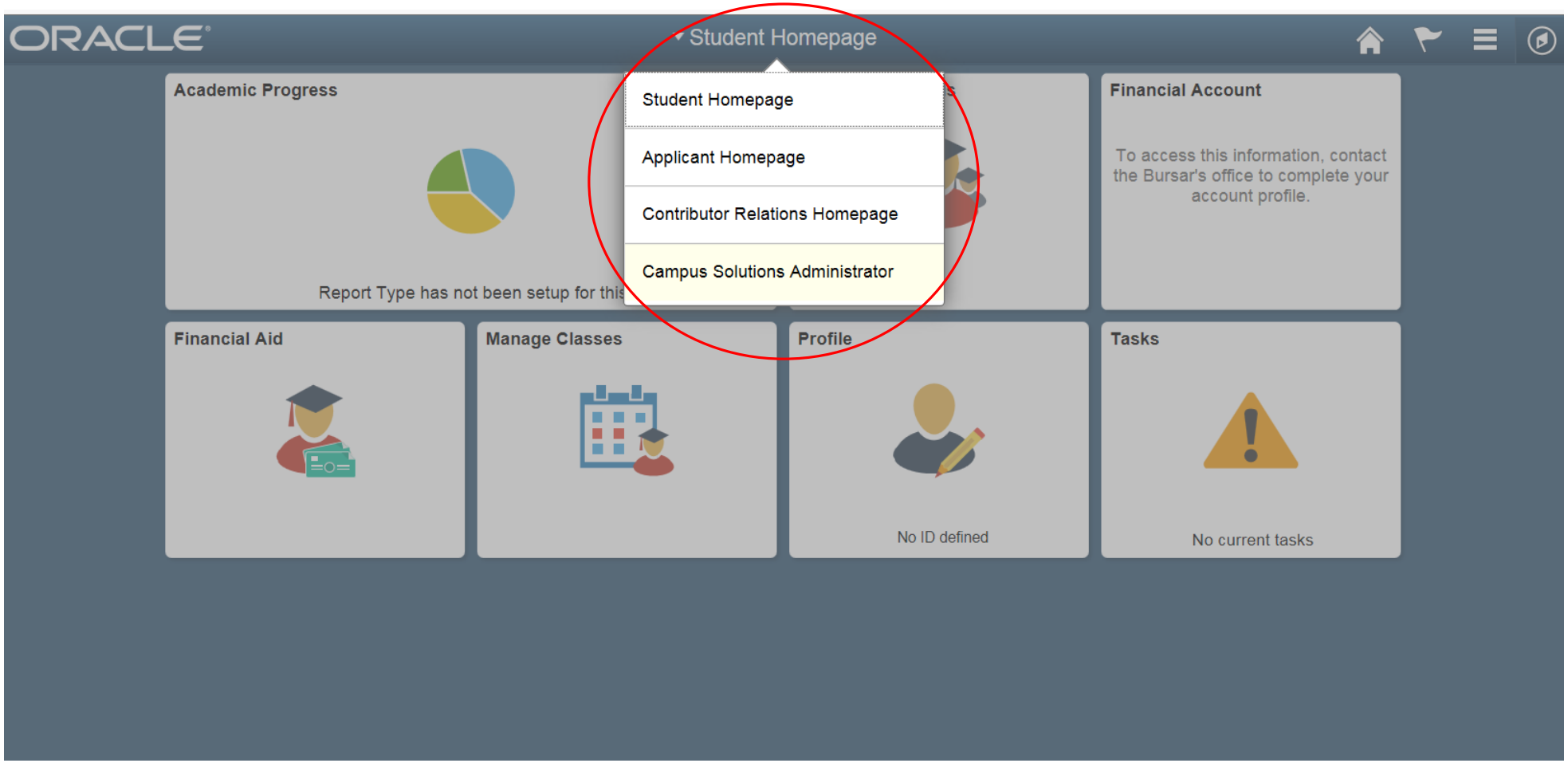
Home Pages

Navigation

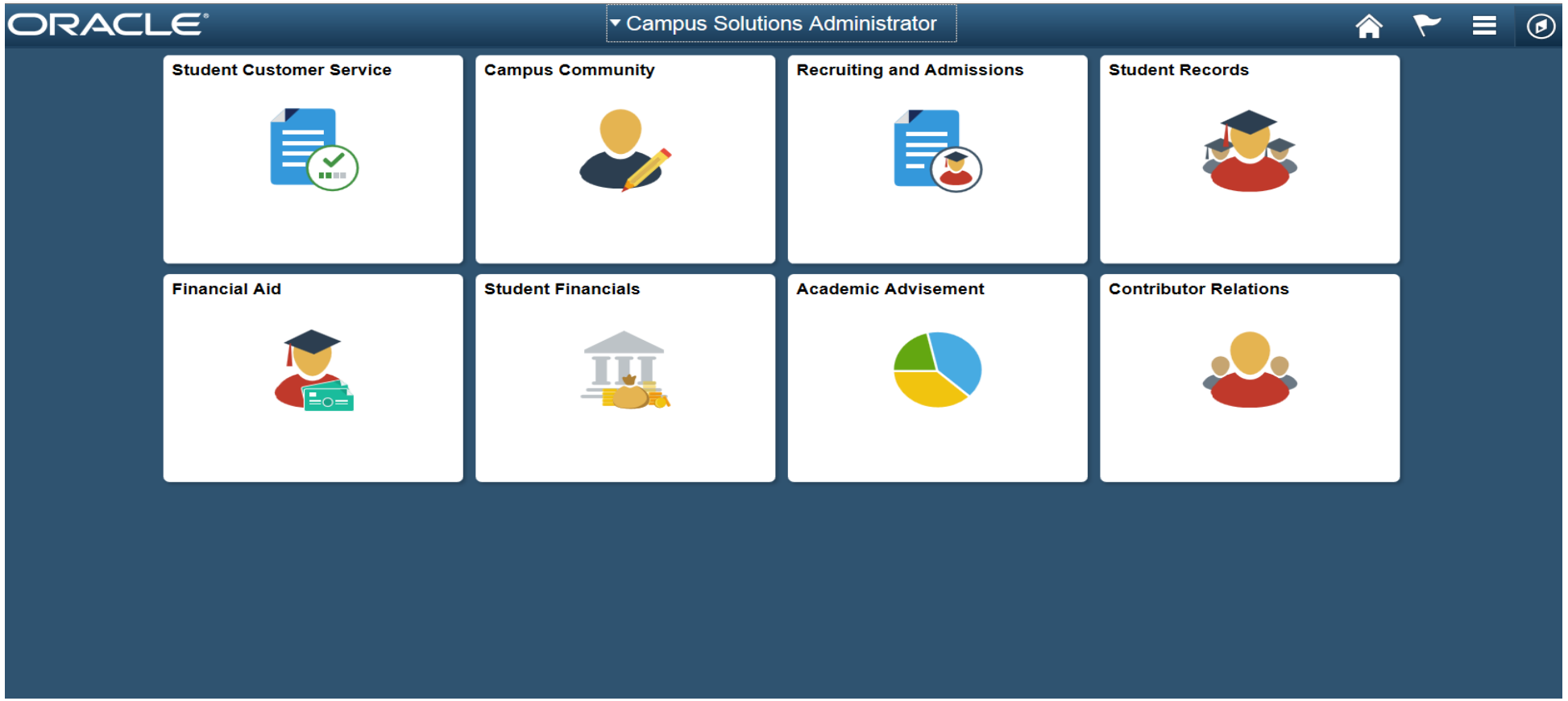
Tiles

FLUID Pages

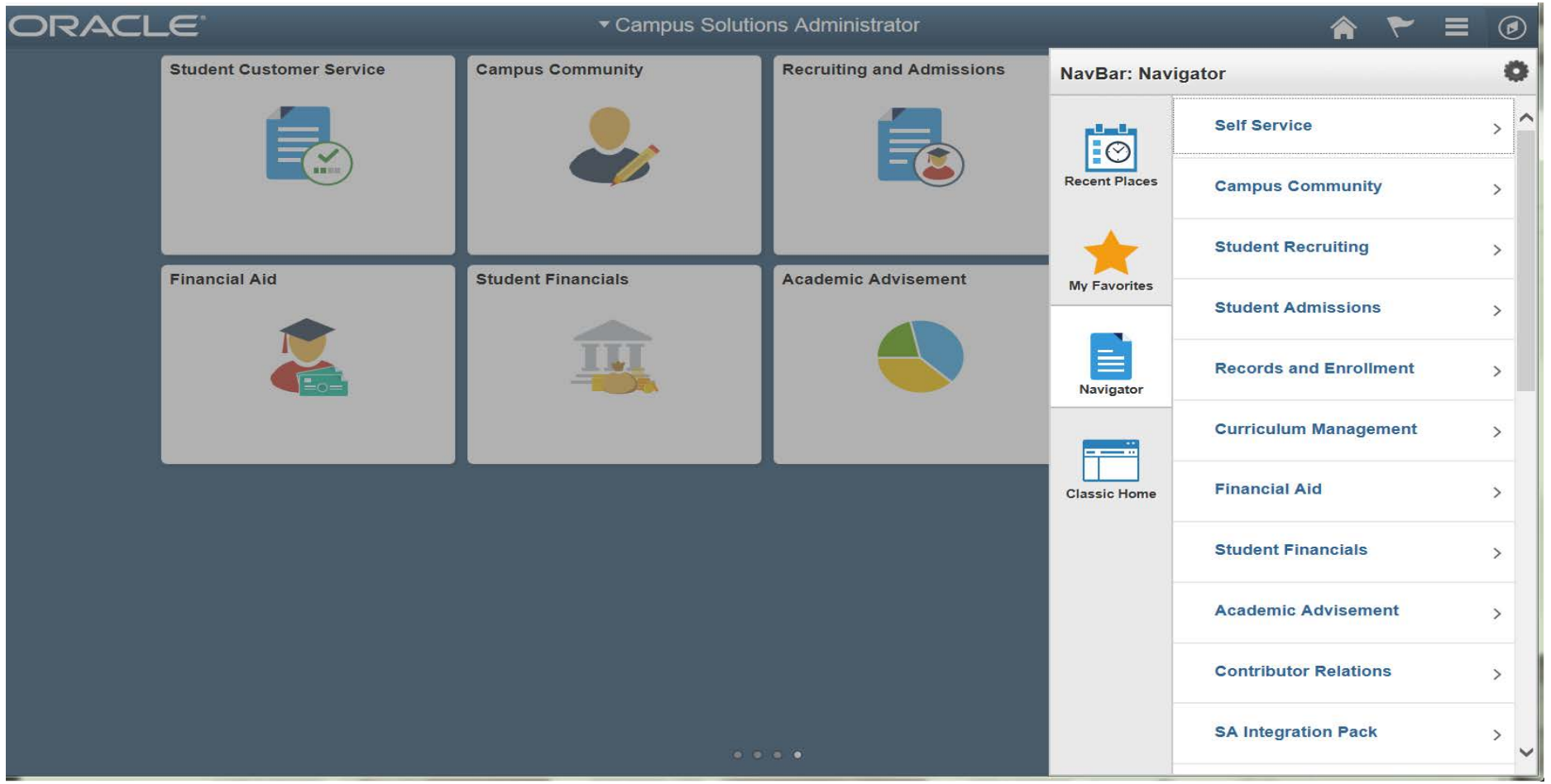
FLUID - Homepages



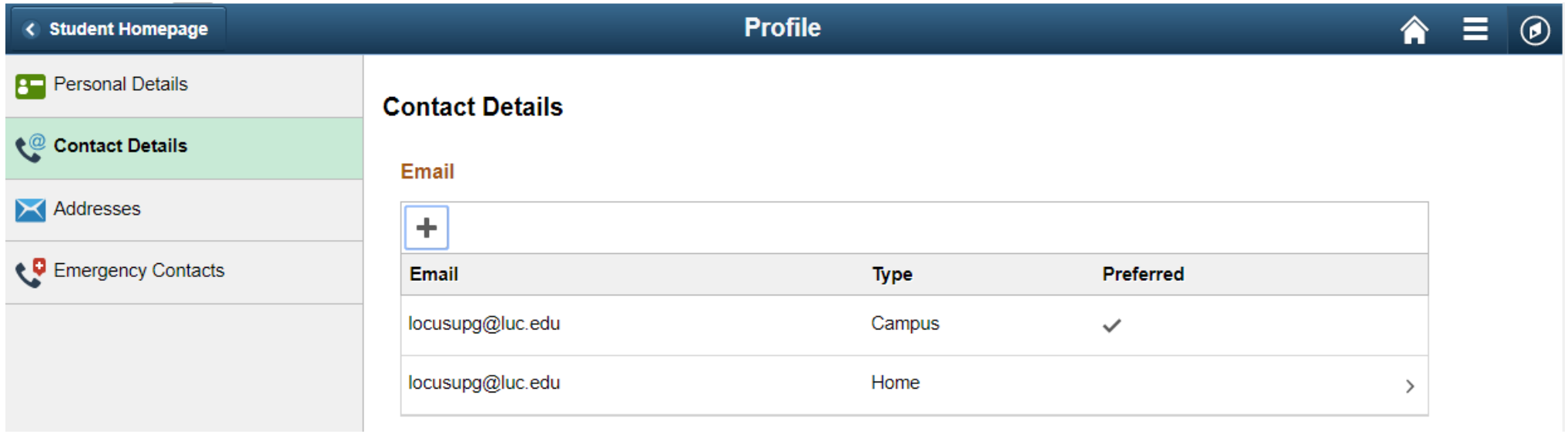
FLUID - Tiles


ORACLE
Campus Solutions Administrator
Student Customer Service
Campus Community
Recruiting and Admissions
Student Records
Financial Aid
Student Financials
Academic Advisement
Contributor Relations

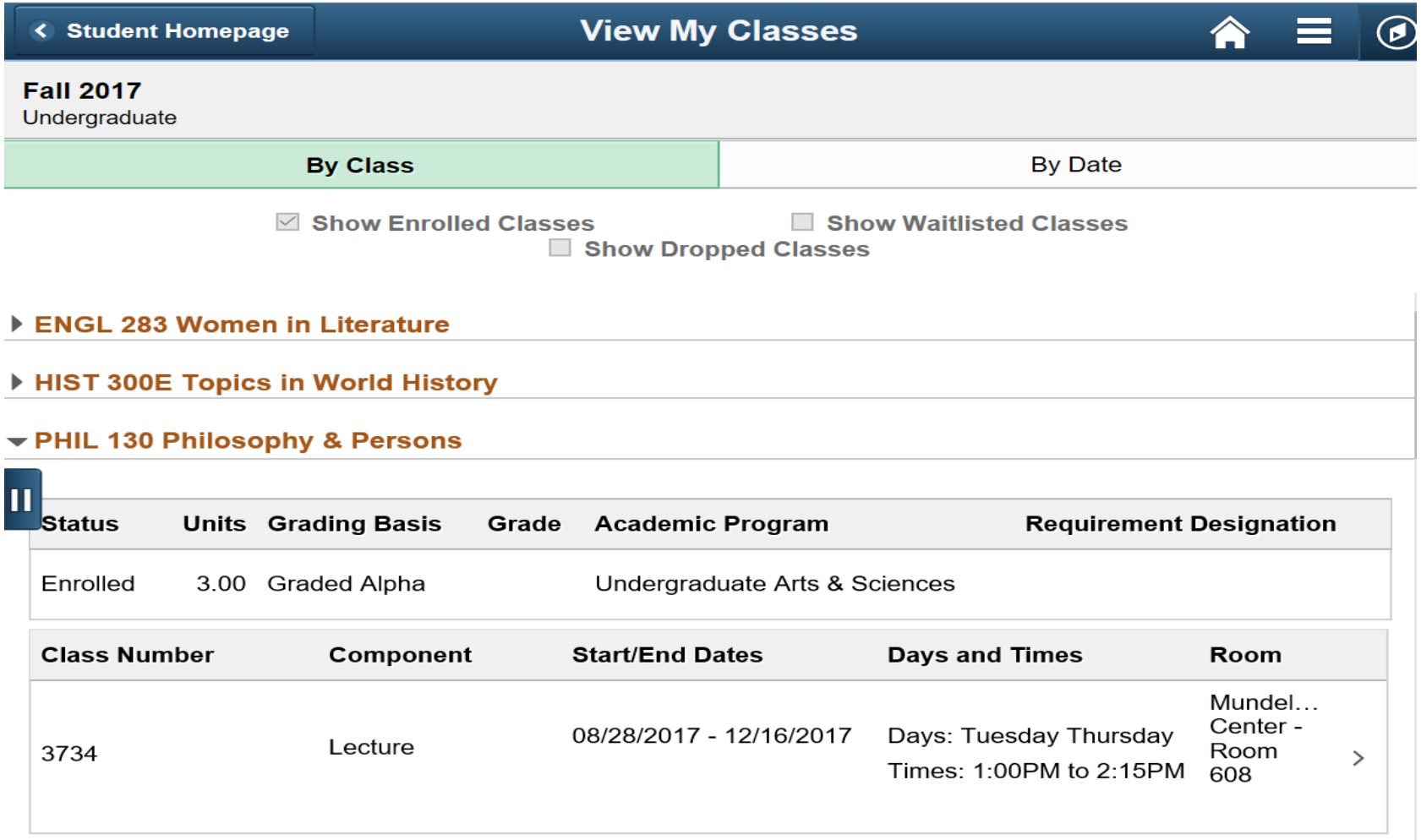
FLUID - NavBar



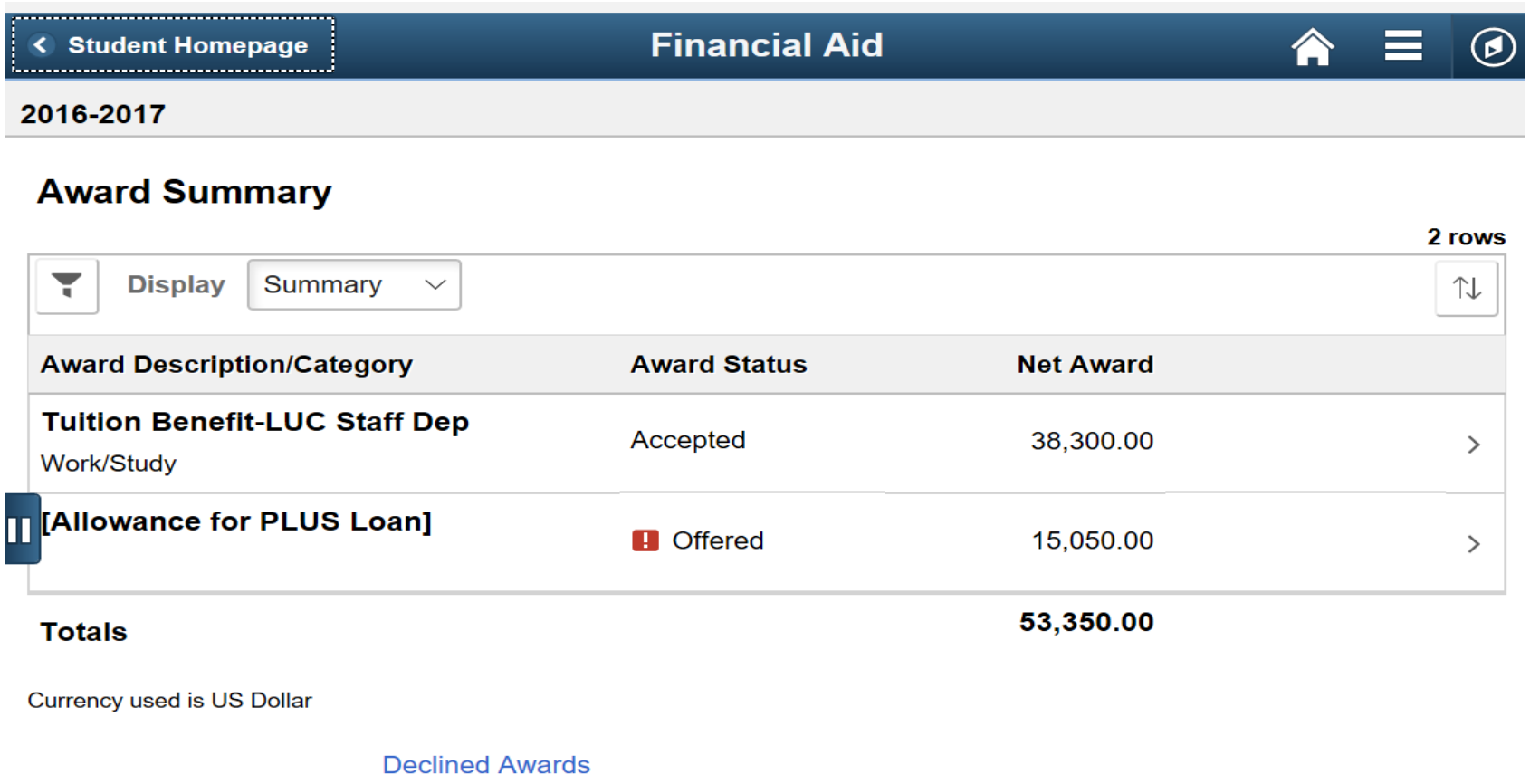
FLUID – Contact Details



FLUID – View My Classes



FLUID – Award Summary



Agenda

Business Intelligence Subcommittee

- S. Malisch

Change Management for Academic Technologies

- B. Montes

Student System Upgrade

- K. Smith

Mobile Device Strategy

- D. Vonder Heide, J. Sibenaller

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Mobile Device Strategy

Introduction -

- Fall 2016 - Internal Audit reviewed the design of Loyola's mobile device governance processes across four areas:
  - Policies/People
  - Data
  - Apps/Websites
  - Devices
- Evaluated against maturity model modified for Higher Education
  - Capability Maturity Model Integration (CMMI)

Maturity Level	Maturity Model Criteria
0 - Non-existent	Systems and processes do not exist for the area.
1 - Initial	Basic systems exist that may meet institutional requirements, if defined, but processes for the area are not documented and are often executed in an ad hoc or inconsistent manner.
2 - Repeatable	Systems exist that meet institutional requirements, where defined, and the supporting processes for the area are repeatable, possibly with consistent results. They are executed and managed by appropriate personnel according to their documented plans, where plans exist.
3 - Defined	Systems exist that meet defined institutional requirements to achieve objectives and goals. The supporting processes are executed for all aspects of the area as defined, documented, and communicated.
4 - Managed	Management uses defined metrics to monitor and control the systems and processes in the area. Management can identify ways to adjust and adapt the systems and processes for increased efficiency without measurable losses of quality or deviations from specifications. *[Note: This level is likely the highest maturity an institution will strive for in a given area, and often only when able to cost effectively automate many aspects of the area.]*
5 - Optimizing	The systems and processes that enable the area are continually improved upon through both incremental and innovative advancement. The organization adopts leading edge practices. *[Note: This level requires substantial resources (e.g., people, processes, technology) and likely may not be appropriate for most areas based on an institution's own cost benefit analysis.]*

Summary Audit Findings

Areas / Components	Observed Current State	Recommended Goal State
Area: Policies/People		
1. Mobile device strategy	1 – Initial	3 – Defined
2. Device procurement and disposal	1 – Initial	2 – Repeatable
3. Acceptable use agreement	2 – Repeatable	3 – Defined
4. Training and awareness	1 – Initial	3 – Defined
Area: Data		
5. Data classification	3 – Defined	3 – Defined
6. Data storage and handling	2 – Repeatable	3 – Defined
7. Authentication and encryption	2 – Repeatable	2 – Repeatable
8. Incident response	3 – Defined	3 – Defined
Area: Apps/Websites		
9. Mobile apps	2 – Repeatable	2 – Repeatable
10. Web applications	2 – Repeatable	2 – Repeatable
11. Remote access	3 – Defined	3 – Defined
12. Encryption	3 – Defined	3 – Defined
Area: Devices		
13. Inventory	1 – Initial	2 – Repeatable
14. Security standards	0 – Non-existent	3 – Defined
15. Technical controls	1 – Initial	3 – Defined
16. Support	2 – Repeatable	2 – Repeatable

Satisfactory Maturity Level

Deficient Maturity Level

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Early Effort

- Engaged Gartner GTP
- Queried AJCU Schools
- Attended Catalyst Conference
- Began drafting our strategy

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Mobile Device Strategy

Mobile Device Strategy → Security Standards → Technical Controls → Inventory Tracking → Training and Awareness → Analytics and Metrics → Internal Audit

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Mobile Device Strategy

Mobile Device Strategy	Develop plan and execute a University-wide mobile device strategy to improve a shared understanding of mobile governance processes and needs.
Security Standards	Improved protection and reduced risks for mobile devices containing Loyola protected and sensitive data through the adoption of security standards for mobile devices.
Technical Controls	Expansion of technical controls with the assessment of adding a mobile device management system to better coordinate and process the provisioning and de-provisioning of mobile devices.
Inventory Tracking	Expansion of inventory tracking for mobile devices to more efficiently monitor and identify mobile devices and their owners on university networks.
Training and Awareness	Creation of training and awareness materials for mobile device usage.
Analytics and Metrics	Improved analytics and metrics related to mobile devices.
Internal Audit	Internal Audit reassessment

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Mobile Device Strategy

Mobile Device Strategy

- Best practices research and assessment
- Mobile device strategy documented
- Create a milestone based plan for the mobile strategy deliverables
- Mobile device strategy approved by the ITESC
- Communicate mobile device strategy to the University
- Assemble MCOE
- Define “mobile devices” & support requirements
- BYOD policy & process documented & approved
- University-owned procurement process documented & approved
- Service catalogue requirements documented & approved
- Policy updates: Current Acceptable Use, Information Security & Data Classification

Security Standards

- Mobile device security standards documented & approved
- Define standards for security configurations for UOD & POD
- Determine technology needs for mobile threat protection

Mobile Device Strategy

Technical Controls

- Define technical changes/parameters
- Determine technology needs for the management of mobile device
- Implement & enforce technical controls

Inventory Tracking

- Mobile device inventory tracking template documented & approved
- Process for tracking mobile assets to be documented & approved

Mobile Device Strategy

Training and Awareness

- ITS Security Practices, Procedures & Training documented, approved, & implemented
- Mobile Device User-Training documented, scheduled & implemented
- Processes in place to triage mobile incidents

Analytics and Metrics

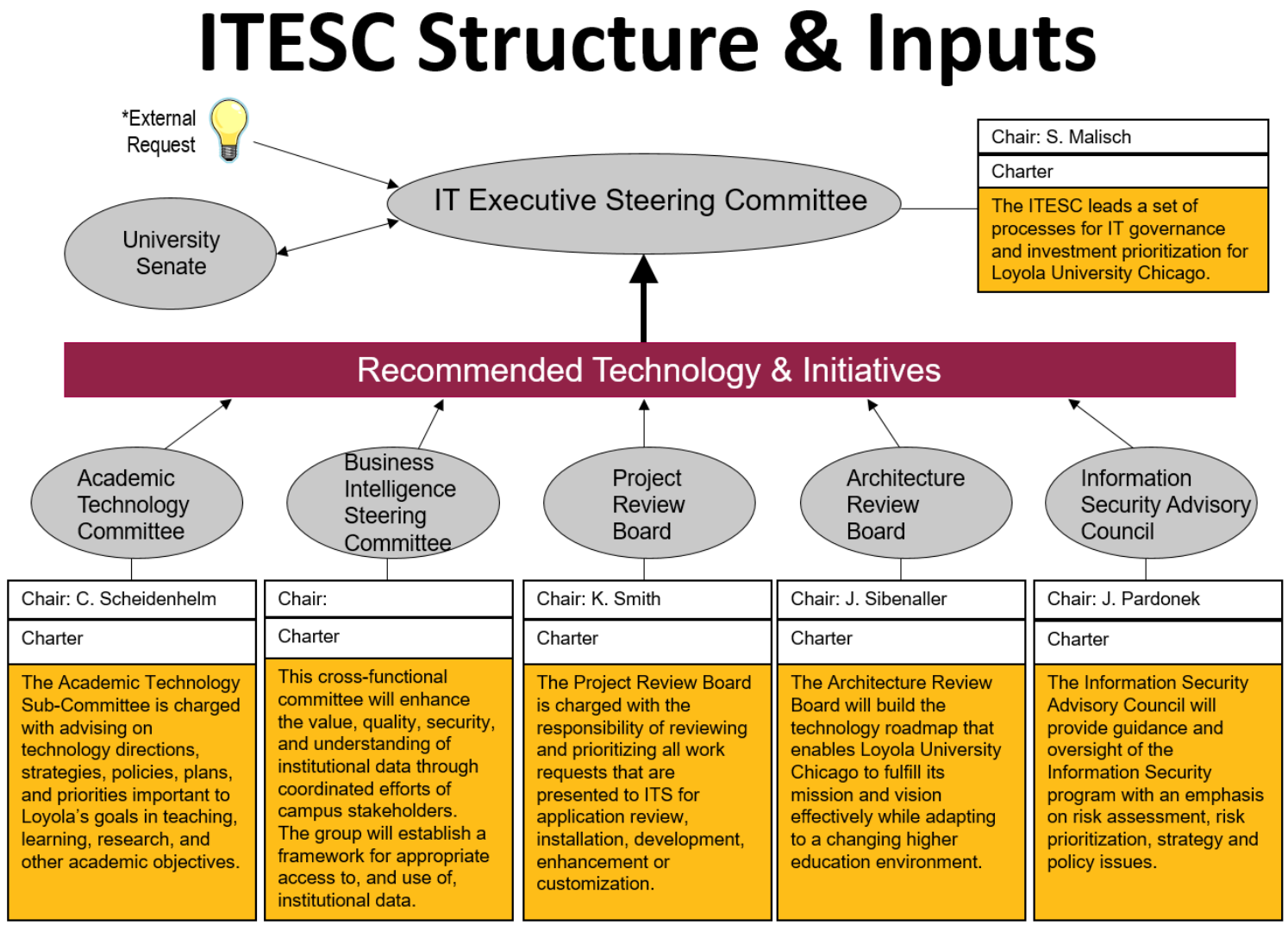
- Mobile device metrics & monitoring process
- Key performance indicators identified & defined

Mobile Device Strategy

- Baker Tilly reassessment of Loyola's mobile device governance posture

Governance

- Utilize the existing ITESC & Subcommittee governance processes
- The MCOE will be a working group under the Architecture Review Board
- All recommendations will come to the ITESC for approval



Mobile Device Strategy – Timeline

Mobile Device Strategy → Security Standards → Technical Controls → Inventory Tracking → Training and Awareness → Analytics and Metrics → Internal Audit

First 30-90 Days — First 6 Months → First 9 Months →

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Next Steps

- Consensus on governance
- Approval to proceed with the execution of the strategy
- Suggestions for representation on the Mobile Center of Excellence

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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

May 04, 2017 - Thursday, 1:30-3:30 PM

- Project Portfolio Prioritization
- Summer Project: 10Gb Connectivity/NGFW
- Academic Year 2017-18 Project: Box to OneDrive
- Information Security Training

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

- Event Management Solution
- Project Portfolio Prioritization
- Information Security Training Proposal

September 20, 2017 – Wednesday 1:30-3:30 PM

- Business Intelligence Subcommittee
- Change Management for Academic Technologies
- Student System Upgrade
- Mobile Device Strategy

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

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

- Project Portfolio Prioritization

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