

ITS Executive Steering Committee (ITESC)

Agenda and Materials – February 27, 2019



Agenda

Integrated Workplace Management System

- H. Gonzalez

Loyola Digital Experience/Email in the Cloud Pilot Results

- S. Malisch, D. Vonder Heide, J. Sibenaller

Key Upcoming Technology Changes

- B. Montes, J. Sibenaller

FACILITIES MANAGEMENT DIVISION

INTEGRATED WORKPLACE MANAGEMENT SYSTEM

*Presentation to ITESC
February 27, 2019*



PROCESS: NEEDS ANALYSIS

Goal:

Loyola University Chicago Facilities Department envisions implementing a **best-practice, single source**, space management system.

The proposed solution will allow for better management of space in **real time**. The solution will support automation of related processes, integrations with supporting Loyola data systems, and robust analytical and reporting functionality.

The solution, once implemented, will provide a single source for space and occupancy data which will result in:

- **accuracy & consistency** of data across multiple systems and reports
- confidence in data reported to **Federal and State** authorities
- maximized **indirect cost recovery**
- development and **repeatability** of metrics, and
- greater space **utilization**.

Full implementation will ultimately result in faster and more universal access to aligned data to support informed decision making, especially related to space utilization, and therefore increase the ability to drive space-related decision making throughout the entire organization.

3 days of interviews, 5 major functional areas:

Provost's Office, ITS, Facilities, Student Development, Finance (including HSD),

Conclusion:

Loyola would benefit from an enterprise-wide integrated workplace management system

Received ITESC endorsement, and ITS project management support

PROCESS: RFP

- ITS and Facilities project team
- Researched IWMS vendor solutions, consulted with Gartner
- Gathered business, technical and evaluation criteria
- RFP issued to 5 pre-qualified vendors, received 4 responses
- Top 3 vendors invited for day-long demonstrations with key stakeholders:
 - Facilities, Campus Planning, ITS, Controller's Office, SPA, Provost's Office, Campus Reservations
- Invited 2 vendors back for final presentations, pricing analysis, and best-and-final offers; spoke with references
- Vendor selected: Archibus
- Next Steps:
 - SFPT, ITS ARB, ITESC – through end of February
 - Contract negotiations – begin early March
 - Implementation – 18-month long process

PROCESS: VENDOR SELECTION

Overall Vendor Ranking Results	
Vendor	Business Requirement Ranking
Archibus	2154
Plannon	2077
Accruent	1911
MRS Chicago	1893

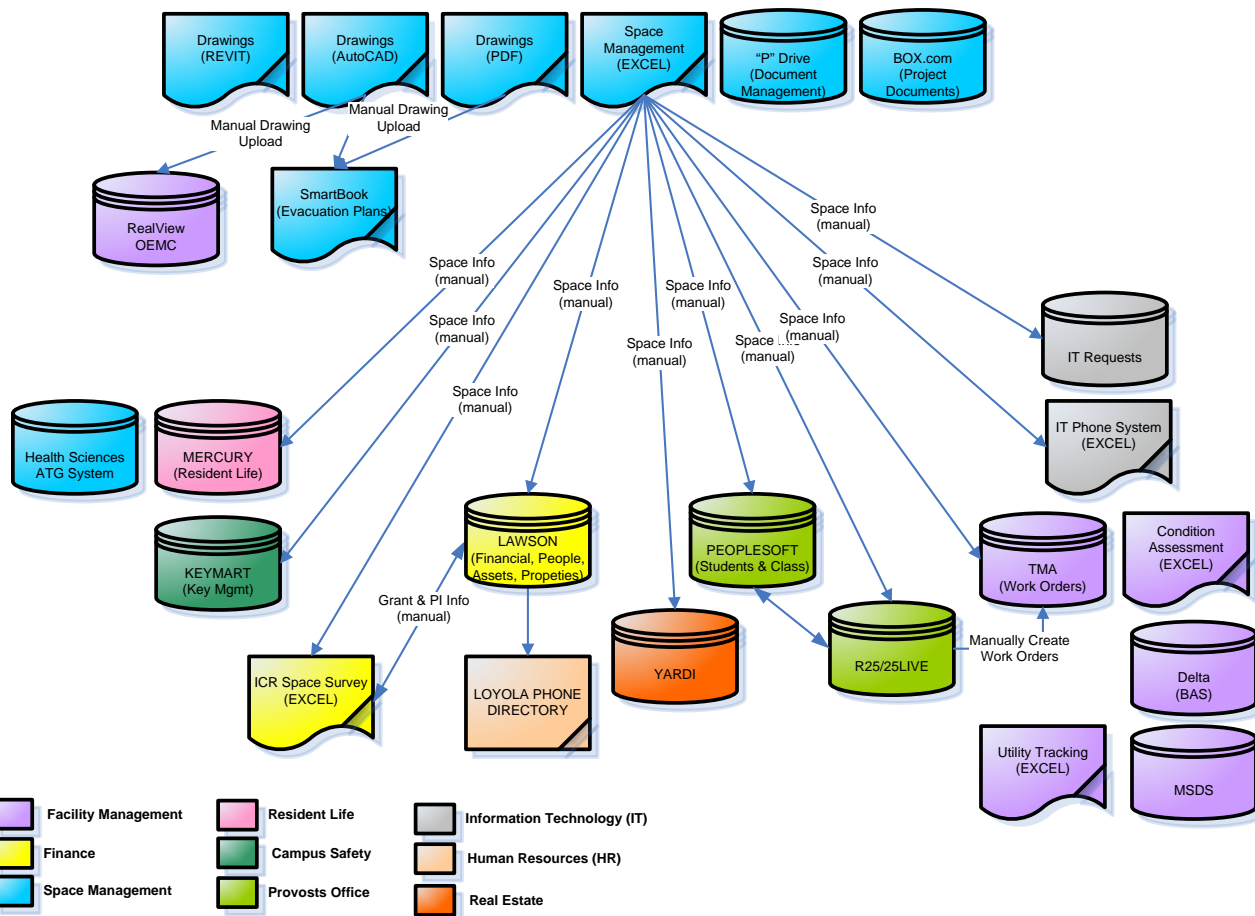
- Archibus had the most robust IWMS platform out of the 4 vendors we evaluated
- Scored highest in all business and technical requirements with existing platform, i.e. no additional development needed
- Flexibility to work with LUC implementation schedule
- Positive feedback from references regarding platform and implementation
- Lowest overall cost over 5 years

ARCHIBUS/JLL EDUCATION CLIENTS



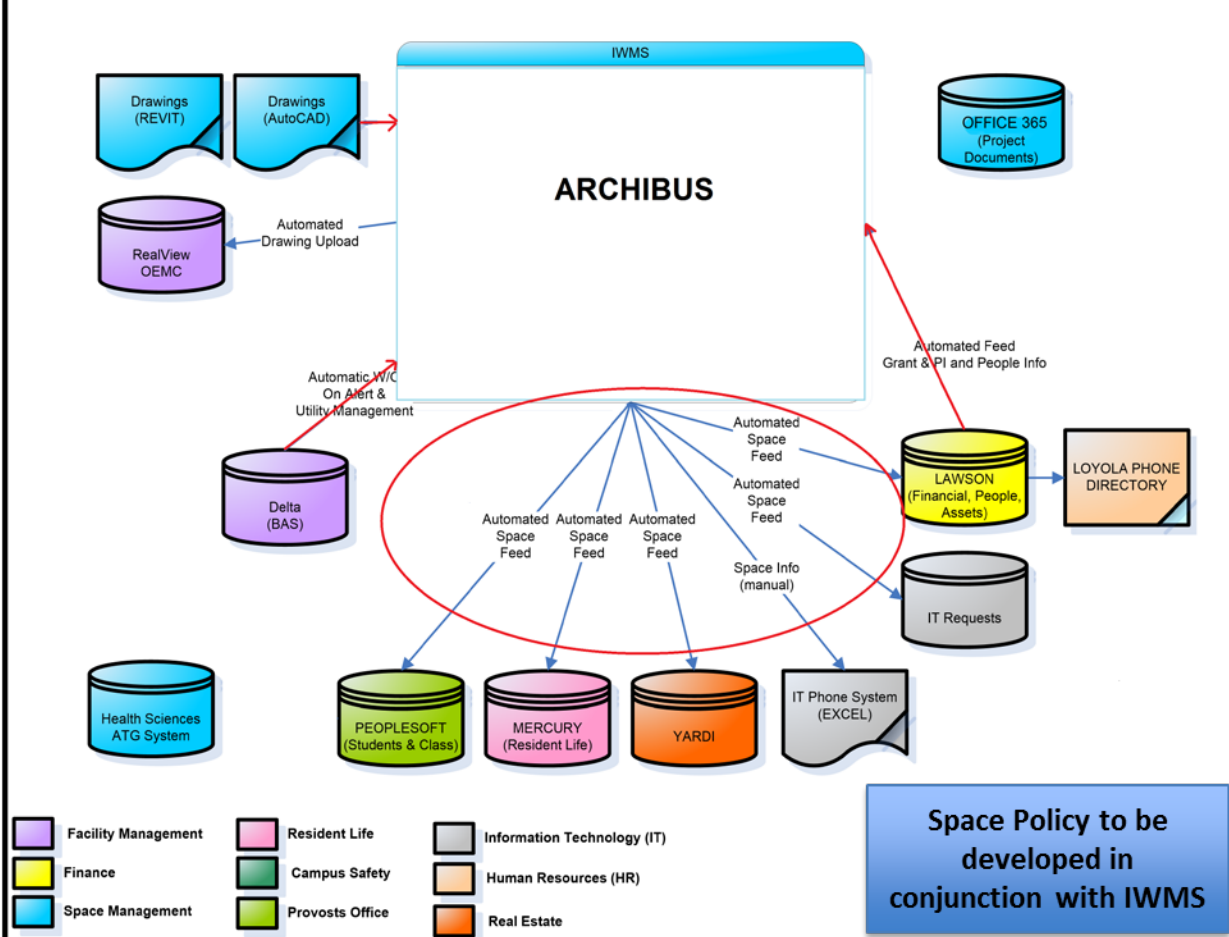
IWMS BEFORE & AFTER

LOYOLA CURRENT STATE TECHNOLOGY MAP
JANUARY 2016



- 24 unique systems
- 10 manual data loads of space management information
- \$250,000 annually spent on manually gathering and entering space information and generating reports

LOYOLA FUTURE STATE TECHNOLOGY MAP



- Manual transfers of data become automated through integrations
- Existing systems begin to feed data back to IWMS through two-way integrations
- Takes away the duplication of systems and make one authoritative source of data

SPACE MANAGEMENT: BEFORE

	A	B	C	D	E	F	G	H	I	J	K	L	M	P
1	Loyola University Chicago													
2	Building Usage By Square Footage													
3	All Campuses													
	Building Number	Building Name	Building Address	Campus	Year Constructed	FY When Building Was Added To Loyola Portfolio	Disposal Year	Building Status	Use Type	AREA (Ext Gross SQ F)	AREA (Int Gross SQ F)	CLASSROOMS	LABS	OFFICES
5	105	Maguire Center	2161 S 1st Ave	HSC		1969		In Use	Academic	231,308				
6	115	Center For Translational Research and Education	2161 S 1st Ave	HSC				In Use	Academic	233,000				
7	120	Stritch School of Medicine	2161 S 1st Ave	HSC				In Use	Academic	190,713				
8	130	Center for Health and Fitness	2161 S 1st Ave	HSC				In Use	Academic	68,719				
9	125	Marcella School of Nursing	2161 S 1st Ave	HSC				In Use	Academic	58,869				
10	112	Cardinal Bernardin Cancer Center	2161 S 1st Ave	HSC				Leased Out	Academic	141,524				
11	258M	Mail Room	6431 N Sheridan	LSC	1991			Demolished	Academic	4,123	4,123	0	0	
12	218	Tennis Courts	1132 W Loyola	LSC				Demolished	Academic	0	0	0	0	0
13	204	Damen Hall (Tower)	6430 N Kenmore	LSC				Demolished	Academic	213,614	191,080	31,781	27,544	51,282
14	212	Alumni Gym	6511 N Sheridan	LSC				Demolished	Academic	67,252	65,905	0	0	0
15	201	Flanner Hall	1068 W Sheridan	LSC	1976			In Use	Academic	64,407	62,355	4,035	21,305	5,570
16	202	Quinlan Life Science	1050 W Sheridan	LSC	2004			In Use	Academic	139,554	139,554	29,248	0	0
17	203	Cuneo Hall	6430 N Kenmore	LSC	2012			In Use	Academic	53,500	53,500			
18	205	MDS Chapel	6453 N Kenmore	LSC	1937			In Use	Academic	21,471	14,742	0	0	0
19	207	Cudahy Science Hall	6460 N Kenmore	LSC	1910	1920		In Use	Academic	38,404	33,508	6,645	8,770	4,700
20	208	Dumbach Hall	6474 N Kenmore	LSC	1908			In Use	Academic	29,546	25,450	16,455	0	760
21	209	Cudahy Library	6515 N Kenmore	LSC	1930	1931		In Use	Academic	124,285	117,879	0	1,535	9,826
22	210	Information Commons	6501 N Kenmore	LSC	2007			In Use	Academic	75,000	69,665	7,635	0	0
23	211	Power House	6525 N Winthrop	LSC				In Use	Academic	13,003	11,994	0	0	0
24	212	Damen Student Center	6511 N Sheridan	LSC	2013	2014		In Use	Academic	107,304		0		
25	213	Centennial Forum	1125 W Loyola	LSC	1969	1969		In Use	Academic	106,773	92,149	0	12,912	1,289
26	230	Loyola Hall	1110-12 W Loyola	LSC				In Use	Academic	12,173	10,831	0	0	8,334
27	238	Halas Sports Center	6458 N Winthrop	LSC	1982			In Use	Academic	73,555	65,681	0	0	0
28	240	Doyle Center	1052-54 W Loyola	LSC				In Use	Academic	15,428	14,140	0	2,814	6,535
29	243	Crown Center	1001-25 W Loyola	LSC	1984			In Use	Academic	81,740	77,020	3,525	7,915	23,620
30	258	Granada Center	6439 N Sheridan	LSC	1991			In Use	Academic	49,286	47,910	0	0	0
31	258L	Campus Safety Office	6427 N Sheridan	LSC	1991			In Use	Academic	8,728	8,728	0	0	
32	259	Mundelein Center	1020 W Sheridan	LSC	1930			In Use	Academic	206,160	191,168	16,861	12,831	19,679
33	260	Sullivan Learning Resource Center	6339 N Sheridan	LSC				In Use	Academic	134,054	130,027	4,889	6,354	17,924

SPACE MANAGEMENT: AFTER

- **Central data repository** which eliminates difficult and time consuming efforts spent generating reports and queries, saving time and cost
- Ability to be more **strategic** regarding **space management decisions** with accurate space management data
- Increased confidence in space management data with **data standards and governance** surrounding process, improving customer satisfaction
- Ability to **benchmark space management information against other universities** to drive efficiency and measure progress

The screenshot displays the ARCHIBUS Space Console interface. At the top, there is a navigation bar with 'ARCHIBUS', 'Quick-Start Home', 'Applications', 'Tasks', 'AFM', and a search bar. Below this is the 'Space Console' header with tabs for 'Space' and 'Occupancy'. The main area is divided into several sections:

- Locations:** A filter section with 'Recent' and 'Add New' buttons, and a table with columns for STRITCH, FLOOR, ROOM, DIVISION, DEPARTMENT, and ROOM. A 'Filter' button is present.
- Summary Table:** A table showing aggregated data for buildings, floors, room areas, capacities, occupancies, and room counts.
- Organizations:** A table listing various departments and their associated room counts and areas.
- 3D Floor Plan:** A 3D visualization of a building floor plan with rooms colored by division. A legend on the right lists 'Assets & Backgrounds' including Room, Labels of Room, ARDOOR, ARWALL, EQUIP, EXDOOR, EXWALL, and EXWINDOW.

Building	Floor	Room Area m ²	Capacity	Occupancy	Room Count
STRITCH	01	3,105.10	6	5	
STRITCH	02	3,176.71	10	0	1
		6,281.81	16	5	1

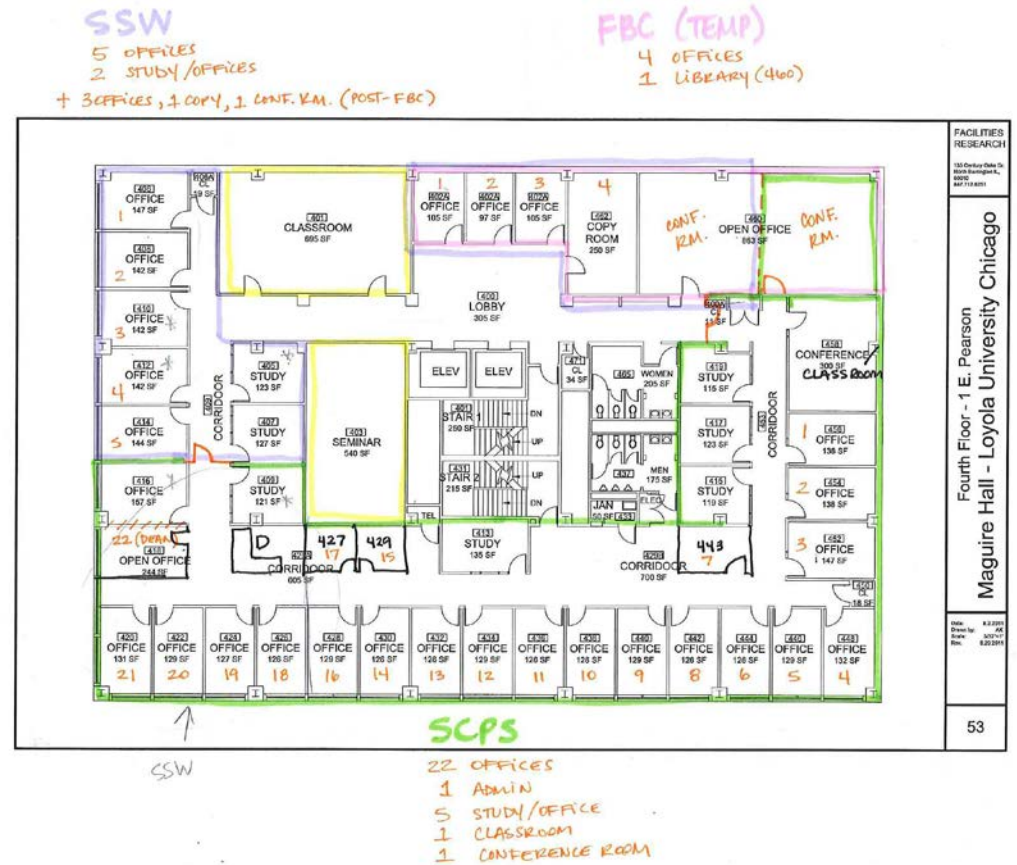
Division/Department	Name	Total Area m ²	Room Legend Count	Assign
[Unassigned]		4,398.25	149	
> LUC ADMIN SVCS	LUC Administrative Svcs	538.22	13	Assign
> LUC FAC	LUC Facilities	392.08	16	Assign
> LUC SOFMED	LUC School of Medicine	886.66	12	Assign
> OPERATIONS	Operations	62.08	1	Assign
> RISK MGMT	Risk Management	8.31	1	Assign

MOVE MANAGEMENT: BEFORE

SSW Office Space Needs						
Count of Employee Type Row Labels	CURRENT SSW SPACE IN LEWIS TOWERS				NEW SSW SPACE IN MAGUIRE	
	Column Labels GA Work Station	Office - Open Cubicle	Office - Private	Reception	Additional Space	Total # Offices: Maguire
Faculty		1	28			29
Adjuncts		1				1
Dentato, Michael		1				1
Freire, Priscilla		1				1
Grossman, Susan		1				1
Hong, Phillip		1				1
Kelly, Brian		1				1
Kelly, Mike		1				1
Kilbane, Terri		1				1
Kim, Caleb		1				1
Lucente, Randy		1				1
Lundy, Marta		1				1
Marley, Jim		1				1
Mason, Christie		1				1
Miedlins, Ivan		1				1
Nelson-Becker, Holly		1				1
Northcutt, Terry		1				1
Orwat, John		1				1
Pyrce, Julia		1				1
Rathbun, Janice		1				1
Simon, Shirley		1				1
Singh, Shweta		1				1
Sokolec, Jeanne		1				1
Spira, Marcia		1				1
Tyson, Katherine		1				1
Vidal, Maria		1				1
Wheeler, Darrell		1				1
Perkins, Nathan		1				1
Krings, Amy		1				1
Slinger, Jonathan		1				1
Grad Assist	7					7
Student GA	7					7
Staff		5	7	1		13
Adams, Doris				1		1
Alemian, Chris			1			1
Bullmer, Bianca	1					1
Chapman, Stephanie			1			1
Corcoran, Sylvia			1			1
Gilway, Hillary			1			1
Gosselin, Caroline	1					1
GREEN Staff	1					1
Holly, Jazmyn	1					1
Nash, Wanda	1					1
Vloedman, Tom			1			1
Bermecker, Jennifer			1			1
Fogarty, Jim			1			1
Grant Staff	2		1			2
Key, Whitney	1					1
Kim, Nuri	1					1
Additional Space					1	1
Decorative Cabot Space					1	1
Total # Offices: Maguire	7	8	35	1	1	52

LOYOLA UNIVERSITY CHICAGO SC				
Reception/student support				
Argudo, Nancy	5-6502	401		SCPS
Sheehy, Patty	5-6503	401		SCPS
Morrison, Elizabeth	5-6820			IPS
Quintana, Elizabeth	5-6511	401		
Academics				
Widen, Jeanne	5-6696	401E		SCPS
Barry, Kelly	5-6824	406A		SCPS
Jordan, Amy	5-6590	401D		SCPS
Ryan, Jean	5-6821			IPS
Harrigan, Marie	5-6557			IPS
Future faculty member				SCPS
Adjunct office				IPS/SCPS
Outreach/admissions/advising				
Carr, Dina	5-6505	401C		
Teetsov, Natasha	5-6506	406B		SCPS
Gettings, Jennifer	5-6805	401B		
Shukla, Palak	5-6535	401		SCPS
Adult and Transfer Center				
Schur, Jill	8-7392			
Bullock, Kia	5-6507	WTC LT 401		SCPS/Adult/ Paraleg
Usher, Michael	5-8956	WTC LT 401		Transfer/ Veterans
Dean				
Pearson, Walter				SCPS

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MOVE MANAGEMENT: AFTER

ARCHIBUS Quick-Start Home Applications AFM - Group Move

Examine Group Moves

Restrict Group Moves

Project Code: STRITCH
Project Status: [v]
Division Code: [v]
Department Code: [v]

Project Information:

Project Code: STRITCH
Project Name: [v]
Project Description: Moving employees in
Department Contact: AFMDEMO
Division Code: ELECTRONIC SYS.
Department Code: ENGINEERING
Requested Start Date: 08/02/2019
Project Manager: [v]
Hours - Estimated: 0
Scheduled Start Date: [v]
Comments: [v]

Employees Moves (5) Employee & Room Equipment (1)

Employee	Move Order Code
LOYOLA CLIENT	199711
LOYOLA SUPERVISOR	199711
LOYOLA UTILITY	199711
MARCUS.FLOYD	199711157 STRITCH I01 I181

Highlights by From and To

Building	Floor	Drawing
<input type="checkbox"/>	[v]	[v]
<input checked="" type="checkbox"/>	01	strich school of med

From/To Floor Plans Highlights for: Employees Only

Close

- Generates trial layouts and cost estimates for **various move scenarios**
- **Streamlines** the move process, including requests, approvals, adding assets and making updates
- **Improves communication, coordination, and collaboration** between in-house and external resources with rules-based workflow processes

- **Automatically updates** departmental, PI, grant, or other occupancy data as part of the move close out
- Tracks and allocates **move costs** by department
- **Distributes action items automatically** to IT and other service providers to speed project execution

ICR SPACE SURVEY: BEFORE

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
	Bldg No.	Bldg Name	Floor Plan Room No.	Facilities Confirmed Room No.	Room Type	Room Type	Room Func.	ASF	% br	Joi	OC	IND	Last Name, First Name	Old - Department	Old - Department	Updated - Department	Updated Dept Code
584	202	Quinlan Life Science	505	505	Aquatic Simulation Lab	2100		2,174		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
585	202	Quinlan Life Science	236	236	Arthropod	2200		275					Lammers, Roberta	BIOLOGY	2112	BIOLOGY	2112
586	202	Quinlan Life Science	142	142	Auditorium (Lecture Area)	6100		1,050						BIOLOGY	2112	BIOLOGY	2112
587	202	Quinlan Life Science	244	244	Autoclave	0100		320						BIOLOGY	2112	BIOLOGY	2112
588	202	Quinlan Life Science	022	022	Behavioral Test Room	2200		95						BIOLOGY	2112	BIOLOGY	2112
589	202	Quinlan Life Science	023	023	Behavioral Test Room	5700		95		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
590	202	Quinlan Life Science	116	116	Biology CLASSROOM Laboratory	2100		1,185					Heller, Jutta	BIOLOGY	2112	BIOLOGY	2112
591	202	Quinlan Life Science	117	117	Biology CLASSROOM Laboratory	2100		1,200						BIOLOGY	2112	BIOLOGY	2112
592	202	Quinlan Life Science	316	316	BIOLOGY CONFERENCE	3110		395					Berg, M. & E. Rosi-Marshall	BIOLOGY	2112	BIOLOGY	2112
593	202	Quinlan Life Science	118	118	Biology Lab	3130		1,220		Y			various instructors	BIOLOGY	2112	BIOLOGY	2112
594	202	Quinlan Life Science	121	121	Biology Prep	3130		290					Thomas, Timothy	BIOLOGY	2112	BIOLOGY	2112
595	202	Quinlan Life Science	340	340	Biology Supply	7400		150					Haas, Barbara	BIOLOGY	2112	BIOLOGY	2112
596	202	Quinlan Life Science	317C	317C	BUSINESS MANAGER	3110		140						BIOLOGY	2112	BIOLOGY	2112
597	202	Quinlan Life Science	036		Cage Clean	0100		65					Grande, Terry	BIOLOGY	2112	BIOLOGY	2112
598	202	Quinlan Life Science	317D	317D	CHAIR	3100		290						BIOLOGY	2112	BIOLOGY	2112
599	202	Quinlan Life Science	133	133	Chemical Storage	0300		210						BIOLOGY	2112	BIOLOGY	2112
500	202	Quinlan Life Science	115	115	Chemistry CLASSROOM Laboratory	2100		2,350						BIOLOGY	2112	BIOLOGY	2112
501	202	Quinlan Life Science	125	125	Chemistry Prep Instrument	7400		475		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
502	202	Quinlan Life Science	034	034	Clean ASSEMBLY	0100		210		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
503	202	Quinlan Life Science	138	138	CLOSET	2200		80						BIOLOGY	2112	BIOLOGY	2112
504	202	Quinlan Life Science	315	315	Computer CLASSROOM Laboratory	3500		990					Tuchman, Nancy	BIOLOGY	2112	BIOLOGY	2112
505	202	Quinlan Life Science	054	054	Con Focal Microscope	5300		150						BIOLOGY	2112	BIOLOGY	2112
506	202	Quinlan Life Science	317A	317A	COPY/FAX/FILES	3110		250					Doering, Jeffrey	BIOLOGY	2112	BIOLOGY	2112
507	202	Quinlan Life Science	130	130	CORR. CHEM STORAGE	2200		140		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
508	202	Quinlan Life Science	126	126	Cylinder Storage	7400		25		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
509	202	Quinlan Life Science	127	127	Cylinder Storage	7400		25		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
510	202	Quinlan Life Science	128	128	Cylinder Storage	7400		35		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
511	202	Quinlan Life Science	058	058	DARKROOM	5700		125						BIOLOGY	2112	BIOLOGY	2112
512	202	Quinlan Life Science	052	052	Digital Imaging	2200		130		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
513	202	Quinlan Life Science	037	037	Dirty Room	2100		195						BIOLOGY	2112	BIOLOGY	2112
514	202	Quinlan Life Science	215	215	Ecology Lab	2200		1,170					Rochlin, William	BIOLOGY	2112	BIOLOGY	2112
515	202	Quinlan Life Science	055	055	EM Sec. (Electron Microscope S	5300		185		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
516	202	Quinlan Life Science	245	245	EQUIPMENT	3100		495						BIOLOGY	2112	BIOLOGY	2112
517	202	Quinlan Life Science	035	035	EQUIPMENT	0100		85					Grande, Terry	BIOLOGY	2112	BIOLOGY	2112
518	202	Quinlan Life Science	505A	505A	EQUIPMENT	7200		98		Y			Shared	BIOLOGY	2112	BIOLOGY	2112
519	202	Quinlan Life Science	341	341	Faculty Office	3130		148					Boussy, Dr. Ian	BIOLOGY	2112	BIOLOGY	2112
520	202	Quinlan Life Science	122	122	Faculty Office	3130		160						BIOLOGY	2112	BIOLOGY	2112

ICR SPACE SURVEY: AFTER

Space Update Form

My Room List Active Space Update Room List Room Details All Rooms

Active Room Information Complete Annual Survey Submit Withdraw

Building Code: 2[20] All[20]

Status	Floor Plan	Compare	Modified By	Building Code	Building Name	Floor Code	Room Code	BU Name	Division Name	Department Name	Room Category
In Progress			First Coordinator	2410	School of Nursing	03	319U	N_School of Nursing	N_Deans Office	N_Deans Office	C-ADMIN
In Progress			First Coordinator	2410	School of Nursing	03	319H	N_School of Nursing	N_Deans Office	N_Deans Office	C-ADMIN
In Progress			First Coordinator	2410	School of Nursing	03	319F	N_School of Nursing	N_Deans Office	N_Deans Office	C-ADMIN
In Progress			First Coordinator	2450	Laurel Heights	03	350L	N_School of Nursing	N_Institute for Health Aging	N_Institute for Health Aging	C-ACAD OFC
In Progress			First Coordinator	2410	School of Nursing	03	319A	SHARED	SHARED	SHARED	C-ADMIN
In Progress			First Coordinator	2410	School of Nursing	03	319	N_School of Nursing	N_Family Health Care Nursing	N_Family Health Care Nursing	C-ADMIN
In Progress			First Coordinator	2410	School of Nursing	07	711	N_School of Nursing	N_Deans Office	N_Deans Office	C-DRY LAB
In Progress			First Coordinator	2410	School of Nursing	07	707B	N_School of Nursing	N_Deans Office	N_Deans Office	C-DRY LAB
In Progress			First Coordinator	2410	School of Nursing	04	405E	N_School of Nursing	N_Family Health Care Nursing	N_FHCN-Administration	C-DRY LAB
In Progress			First Coordinator	2410	School of Nursing	03	319W	N_School of Nursing	N_Community Health Systems	N_Community Health Systems	C-ADMIN

Update Rooms, Occupants and Pls

Floor Code: 03[1] All[1] Page 1 of 1

Room Details

Property Code: a14 Property Name: Surgery Brain Research

Room Area: 118 Room Area Manual Entry: 0.00

Floor Code: 02 Room Category: 310 Department (RM): 143

Room Code: J245B Room Type: Office Section (RM): 143-0000

Space Standard: Unknown Workstation Count: 1 Occupant Vacant Percent: 0.00

Room Comments

Space Percentage

Room Code	Room Category	Des	Department (PCT)	Department Name	Section (PCT)	Section Name	Percentage of Space
J245b			143	NEUROBIOLOGY, PHARMACOLOGY AND PHYSIOLOGY	143-0000	NEUROBIOLOGY, PHARMACOLOGY AND PHYSIOLOGY	100.00
J245B	310	Off					

Occupant

Chicago ID	Full Name	Department (PCT)	Department Name	Section (PCT)	Section Name
91344269A	LLOYD, PHILIP E.	143	NEUROBIOLOGY, PHARMACOLOGY AND PHYSIOLOGY	143-0000	NEUROBIOLOGY, PHARMACOLOGY AND PHYSIOLOGY

Add/Edit Organization Split

Department (PCT): 010 COMMITTEE ON CLINICAL PHARMACOLOGY AND PHARMACOGEN...

Section (PCT): 010-0000 COMMITTEE ON CLINICAL PHARMACOLOGY AND PHARMACOGEN...

Start Date: 12/19/2013

End Date:

Primary Room Attributes: Yes

Percentage of Space: 100.00

Vacant Percent:

Workstation Count: 1

Comments: Test Space Percentage...

Update

- Ability to report on sponsored research **regularly, between the reporting periods** to track and monitor progress and use the data strategically.
- Ability to track space use and overhead costs **down to the principal investigator**
- **10x+ payback** on investment in solutions through increased ICR (U of Chicago)
- **Decreased ICR space survey time by 67%** (U Mass)
- **100% participation** in space survey/studies for ICR for the first time (UIC)

ASSET MANAGEMENT: BEFORE

Asset Tag Form

Click here to send form
General Accounting

General Accounting assigns an asset tag to all recently purchased capital assets. The asset tag and copy of the invoice are mailed to the contact person identified on the invoice or purchase order.

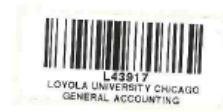
Please affix the tag(s) received to the piece(s) of equipment highlighted on the invoices. If possible, place the inventory tag(s) in a location that is visible (especially on large items), but does not interfere with the use of the equipment. After attaching the tag to the equipment, please fill out this form and email it to General Accounting. Keep in mind that we will look for this equipment during the inventory.

Please fill out the following information and return this form:

Tag Number(s)	L43917
Description of Asset	HEAT EXCHANGER
Department	
Room Number	
Building Number	
Primary User (Person Responsible)	
Serial Number(s)	

Questions on how to complete this form may be directed to:

Paul Bushno
Accounting Manager, General Accounting
Loyola University Chicago
820 N. Michigan Ave.
Chicago, IL 60611
(312) 915-8712
Email: pbushno@luc.edu



Note: In the event that any piece of equipment with a Loyola University inventory tag is to be disposed by way of sale, transfer, or scrapping, please refer to the Capital Asset Management Policy available online at <http://www.luc.edu/finance/policies.shtml>

The Equipment Disposal Form can be located at
http://www.luc.edu/media/lucedu/finance/pdfs/Equipment_Disposal_Form.pdf

ASSET MANAGEMENT: AFTER

Equipment Assets Console


Room List

Room Code: 1 [9] R [1] All [10] Page 1 of 1

Building Code	Floor Code	Room Code
str		
STRITCH	01	125
STRITCH	01	134
STRITCH	01	135
STRITCH	01	161
STRITCH	01	181
STRITCH	01	182
STRITCH	01	184
STRITCH	01	184A
STRITCH	01	185
STRITCH	04	RF

Plan for building STRITCH and floor 01


Item(s) found: STRITCH;01;184



Equipment

Equipment Code* NOELLE
Employee Name
Telecom Area Level N/A
Telecom Service Type N/A

Equipment Standard MANNEQUIN
Building Code STRITCH
Floor Code 01
Room Code 184



Employees

No records to display.

Equipment

Equipment Code	Equipment Standard	Employee Name	Telecom Area Level	Telecom Service Type
NOELLE	MANNEQUIN		N/A	N/A

- Ability to locate assets down to the **room level**
- Ability to more **frequently survey** asset locations for accurate upload and integration with Lawson
- Ability to attach assets to move projects
- Ability to report on **condition of assets** for recording book value, depreciation, and disposal
- **Data-driven** facility condition assessments vs. anecdotal will build a more robust and reliable deferred maintenance schedule

DASHBOARDS

- Culls together data from all of the modules of the system: real estate, space, project management, moves, assets, etc
- Metrics are defined by us as useful or critical to our decision making
- Alerts can be set up to notify us of variances, or items that need our attention
- Dashboards are configurable by user or role

ARCHIBUS
Mobile Portfolio Manager Applications
AFM ▾

Integrated Portfolio Metrics

Metric	Current	Change	Change Per Year	% of Target	Trend
Real Estate CapEx - Budget Variance	C\$471K	-C\$14K	-C\$94K	89%	
Real Estate Op Ex	C\$851M	-C\$26M	-C\$170M	93%	
TCO (per Occupant)	C\$2,146	-C\$64	-C\$429	105%	
Costs Common-Area Maintenance (CAM) (per Rentable Area)	C\$1/RSF	C\$0/RSF	C\$0/RSF	81%	
Costs - Rent (per Rentable Area)	C\$25	C\$1	-C\$1	97%	
Leased to Owned (%)	499%	15%	115%	83%	
Area Per Occupant	15 m ²	-1 m ²	-3 m ²	99%	
Market to Book Value	C\$246M	C\$7M	C\$57M	93%	

Portfolio Alerts

- 1 Projects: 20% Schedule Variance
- 2 Projects: 10% Schedule Variance
- 2 Floors: with 30% Vacancy
- 0 Projects: 20% Budget Variance
- 0 Projects: 10% Budget Variance

Facility Alerts

- 23 Work Teams: With less than 85% Service-Level Compliance
- 2 Regulatory Actions: Due This Week
- 10 Requests: Escalated
- 10 Work Teams: With less than 85% Customer Satisfaction
- 34 Space Requests: Requiring Approval
- 1 Move Requests: Needing Approval

Capital Projects Variance

Top 5 by Variance

PN-2008-I204-RENO-0166	C\$0K
PN-2009-PLAZA 3-RENO-0187	C\$0K
PN-2007-LONOLD-LEASEOPT-0028	C\$0K
PN-2009-LONWARE-RENO-0153	C\$0K
PN-2011-CHICMAN-PROPACQ-0012	C\$0K

Capital Projects

Top 5 by Size of Budget

ALL	C\$5,222,205
Property Disposal	C\$3,462,608
Renovation	C\$3,389,795
Site Work	C\$3,331,734
Move	C\$3,252,732

Market Less Book Value

Top 5 Buildings

RIYADMAN	C\$5M
LONWARE	C\$5M
LAB1	C\$5M
PARIOFF	C\$5M
LX	C\$5M

Executive Reports

- Portfolio
- Buildings
- Leases
- Projects
- Costs

INVESTMENT AND ROI

IWMS ROI Analysis Summary/	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Total
Archibus (PaaS Installation)								
One Time Implementation Costs								
Implementation Costs	(280,040)	(213,167)	(30,247)					(523,453)
Software Costs	(48,803)	(49,596)	(8,181)					(106,580)
One-Time Costs (*Capital)	(328,843)	(262,763)	(38,428)					(630,033)
Ongoing Annual Expenses								
JLL Archibus Hosting	(26,400)	(26,400)	(26,400)	(26,400)	(26,400)	(27,192)	(27,192)	(186,384)
Software Support	(13,421)	(25,695)	(27,740)	(27,740)	(27,740)	(28,572)	(28,572)	(179,480)
Software Subscription Fee	(6,467)	(13,761)	(14,742)	(14,742)	(14,742)	(15,184)	(15,184)	(94,823)
Annual Support of Integrations	(2,880)	(1,920)	(960)	(960)	(960)	(989)	(989)	(9,658)
Annual 10 Concurrent License Subscription and Support	(862)	(862)	(862)	(862)	(862)	(888)	(888)	(6,086)
JLL Implementation Support of Archibus Software Upgrades				(25,000)				(25,000)
Hardware Costs		(25,000)			(25,000)			(50,000)
Ongoing Costs (**Operating)	(50,030)	(93,638)	(70,704)	(95,704)	(95,704)	(72,825)	(72,825)	(551,430)
Total Costs:	(378,873)	(356,401)	(109,132)	(95,704)	(95,704)	(72,825)	(72,825)	(1,181,464)
Ongoing Costs Savings								
Salary and Benefit Savings From IWMS Efficiency	70,144	134,570	150,421	163,680	158,037	161,987	176,266	1,015,105
Consolidation of TMA and 25Live SaaS Functionality Into IWMS		20,000	54,400	55,488	56,598	57,730	58,884	303,100
.5% IDC Recovery Gain From IWMS, Assuming FY18 Research Revenue				38,510	38,510	38,510	38,510	154,040
Ongoing Savings	70,144	154,570	204,821	257,678	253,144	258,227	273,660	1,472,244
Total Ongoing Costs Savings	70,144	154,570	204,821	257,678	253,144	258,227	273,660	1,472,244
Net Cash Flow (NCF):	(\$308,729)	(\$201,831)	\$95,689	\$161,974	\$157,440	\$185,402	\$200,835	
Cumulative NCF:	(\$308,729)	(\$510,560)	(\$414,871)	(\$252,897)	(\$95,456)	\$89,946	\$290,781	
Payback Period in Years:						5.5		

Funding Sources:

* Facilities Minor Renovation Capital Pool

** Savings from 25Live,TMA, and various Facilities Operating AUs

IWMS BENEFITS

- Loyola will benefit from an Integrated Workplace Management System
 - Finance: redeploy 465 hours annually + 180 hours every 4 years; accurate F&A rate calculations; accurate tracking of assets for disposal and depreciation
 - ITS: track location and age of security cameras; accurate personnel and equipment location for service calls
 - Facilities: redeploy 900 hours annually; accurate reporting out of space for surveys; provide accurate floorplans to departments
 - Provost's Office: efficient space utilization; avoid duplication of space; easily query classroom/lab data and office assignments
 - Student Development: redeploy 1,080 hours tracking and managing inventory in residence halls; eliminate duplication of data entry with R25, TMA, classroom grid
- Minimum 3.5 FTE productivity redeployment (only 5 major areas interviewed)

REQUEST

- Support of ITESC to invest in an enterprise-wide Integrated Workplace Management System
- Senior Leadership's support of the implementation process which will require time and effort of various departments across the University
 - Accounting
 - SPA
 - HR
 - ITS
 - Provost's Office
 - Student Development

Agenda

Integrated Workplace Management System

- H. Gonzalez

Loyola Digital Experience/Email in the Cloud Pilot Results

- S. Malisch, D. Vonder Heide, J. Sibenaller

Key Upcoming Technology Changes

- B. Montes, J. Sibenaller

I am a...



Loyola's technology architecture strategy supports

- Schedules which are 24/7 in nature (Anytime)
- An LUC Community which is mobile (Anywhere)
- Straightforward and appropriate access to systems (Access)

Students/Faculty/Staff/Alums/Friends...

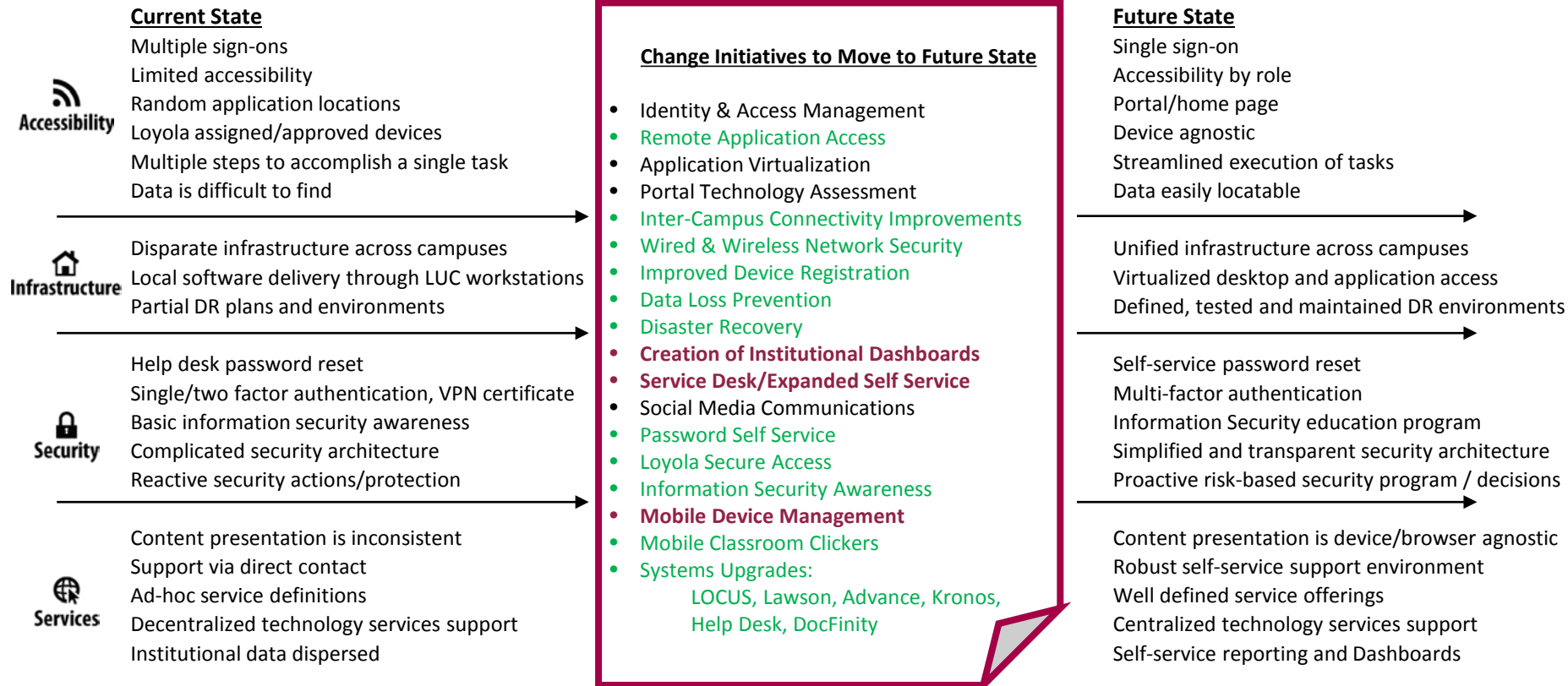
"Technology at Loyola enables me to fulfill my relationship in a simple, secure and seamless way."

Regardless of where I am, I can:

- **Collaborate** with students, faculty and staff via meetings or 1:1 (video conference, share files and research data securely)
- **Complete** business with Loyola (apply to Loyola, schedule a visit, sign up for events, register for classes, view grades, pay my bill, donate, etc.)
- **Conduct** self-service activities (reset my password, reserve a meeting space or digital media equipment, access reporting, etc.)
- **Connect** to my Loyola services without intervention from any device



Sunset the “Anytime Anywhere Access” Strategy



Loyola’s technology architecture strategy supports

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Students/Faculty/Staff/Alums/Friends...

“Technology at Loyola enables me to fulfill my relationship in a simple, secure and seamless way.”

Developing the next ITS Strategic Direction

DRAFT

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



Microsoft and E5 Bundle

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”

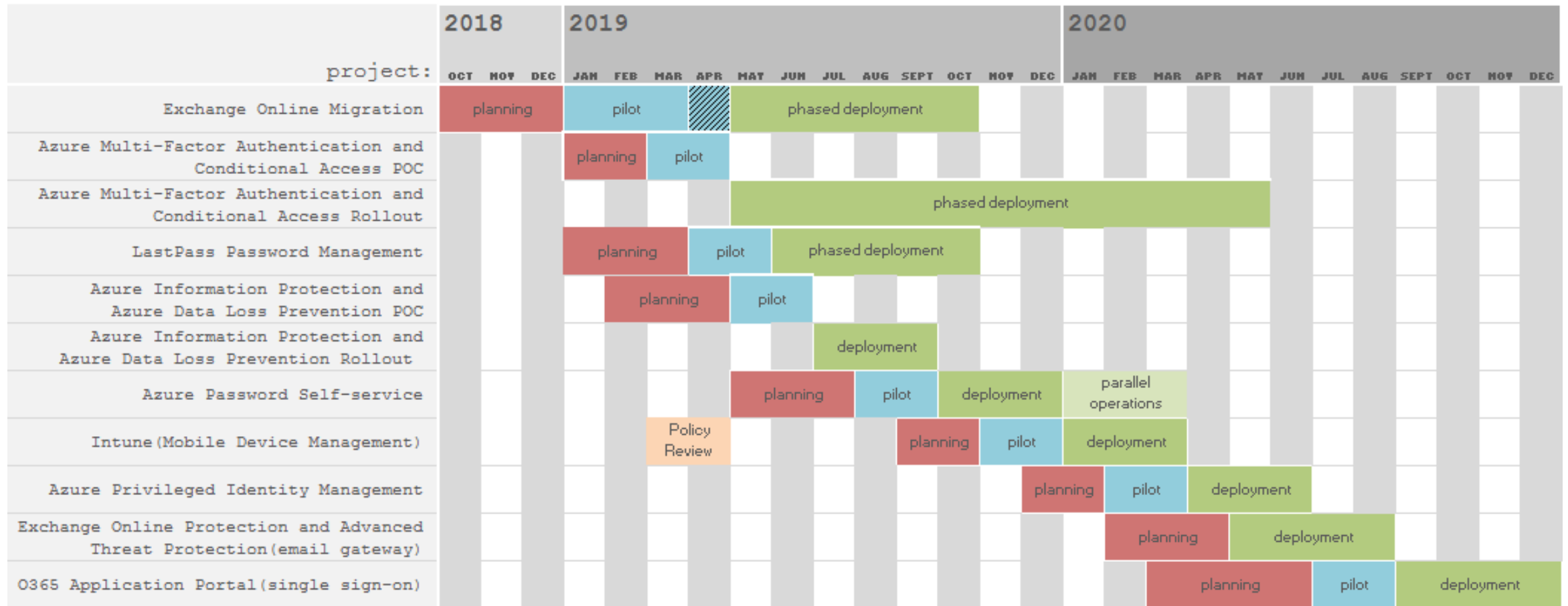
❖ Subject to adjustment based on priorities of next University strategic plan



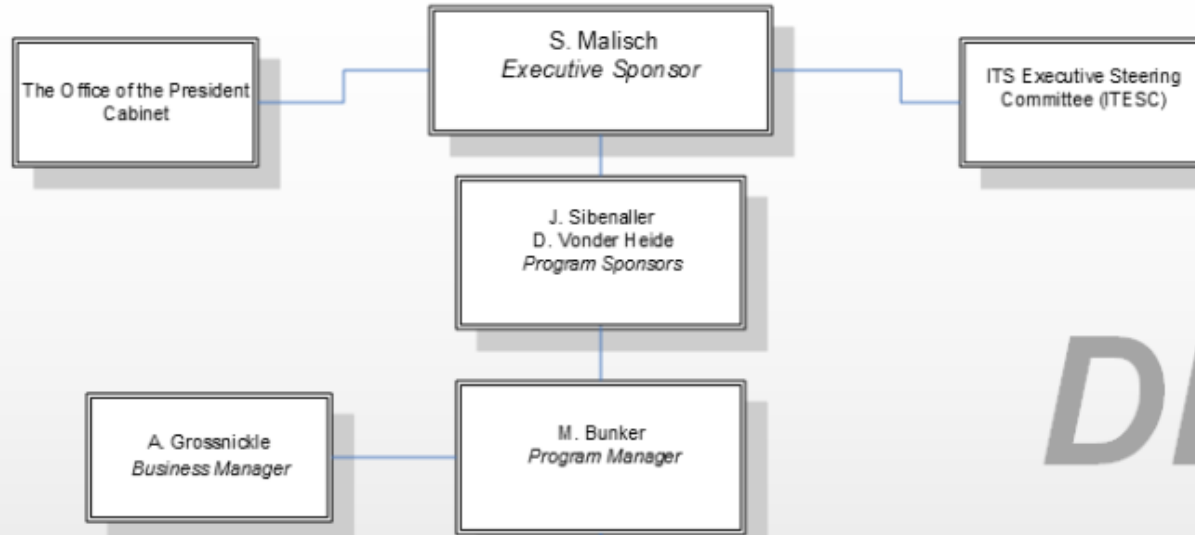
Microsoft & E5 Bundle Proposal

DRAFT

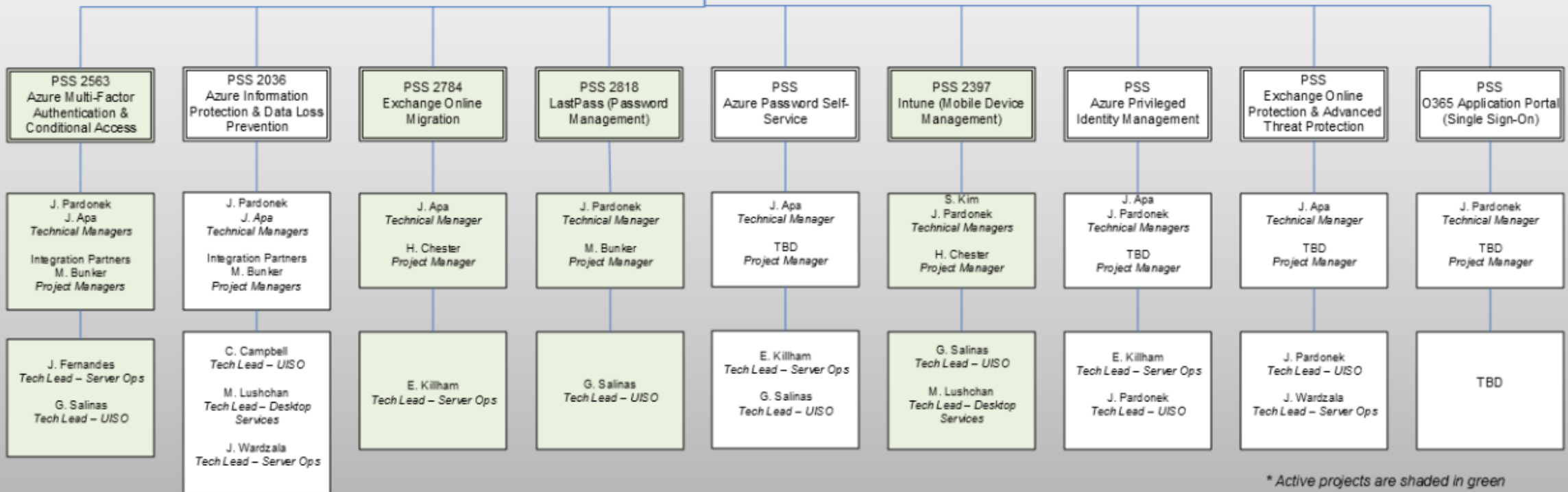
Project timeline for E5 licensing - 2/25/2019



LDE Foundation: Collaboration and Security Program
Organizational Breakdown Structure



DRAFT



* Active projects are shaded in green

Microsoft Exchange Online Progress

Email Environment

- GroupWise to Exchange May 2013
- Faculty/Staff: On-Premise Exchange – 10,500 Accounts
- Students: Exchange Online – 52,700 Accounts

Proposal

- Migrate all faculty/staff accounts from on-premise to Exchange Online

Reasons for Proposal

- Industry direction
- Faculty/Staff/Students on the same platform
- Eliminate capital cost to replace servers (\$260,000)
- Changes profile of work

Microsoft Exchange Online Progress

Changes and Improvements

Visible to user community:

- 100 GB Mailbox
- Unlimited Online Email Archiving
- Web Interface / Functionality
- Direct Integration with OneDrive
- Faster Search Results

Behind the scenes:

- GDPR, HIPAA and FERPA Compliant
- Disaster Recovery
- Information Security
- Frequency of Updates

Microsoft Exchange Online Progress

Pilot Group

- Small Pilot Group Migrated
- Identified initial issues list

Larger Proof of Concept Group

- Larger Group Migrated - 30+ Users
- Process Refined
 - MSFT “Grouping Tool”
 - Automated PowerShell Scripts
 - Created End User Testing Plan
- Majority of Issues Resolved
 - Voicemail
 - Moving mailboxes in larger groups

Microsoft Exchange Online Migration

User Experience	Corrective Action	Additional Research
Outlook client prompts user to restart application	One-time action	Part of communication plan
Small percentage of shared calendar views defaulted to free/busy	Remove and re-add calendar sharing	Researching with Microsoft and user community
Some mobile clients display improperly (colors, folders)	Delete account and re-add on mobile device	Researching with Microsoft and user community
Laptops and personal devices users prompted to login again	One-time action	Part of communication plan
Voicemail PIN needs to be reset	New PIN is emailed to users	Part of the communication plan
Message waiting lamp no longer functional	None	Part of the communication plan
Outlook Web Application defaults to "Focused View"	Change view to "Other"	Part of communication plan

Microsoft Exchange Online Migration

Present to President's Cabinet, Dean's Council, ATC – March/April

Next Steps – April

- Migrate the remainder of ITS
- Migrate one department / division
- Execute End User Testing Plan with ITS

Begin Migration

- May – July – 8700 user accounts, 1800 shared mailboxes
- Draft Timeline

Microsoft Exchange Online Migration

project:	2018			2019											
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
Exchange Online Migration	planning			pilot			/ / / / / / / / / / / / / /	phased deployment							

group:	April				May				June				July			
	5	12	19	26	3	10	17	24	31	7	14	21	28	5	12	19
ITS (100)				End of Term												
University Library and Quilan School of Business (200)				Graduation												
Retirees and Emeritus (800)																
Group 5 (1,500)																
Group 6 (1,500)																
Group 7 (1,500)																
Group 8 (1,500)																
Group 9 (1,500)																

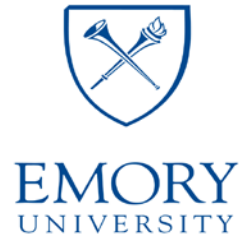
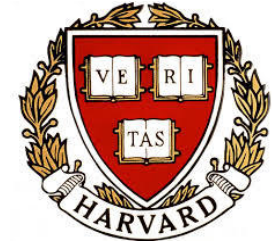
* Draft Calendar has flexibility to move beyond July and increase separation between groups if needed

Microsoft Exchange Online Migration

Communication Channels

- Community Announcement – LDE
- FAQ Website and ITS Service Desk Knowledge Articles
- Information Sessions
- Inside Loyola
- Direct Communications
 - 21-7-3-1

Microsoft Exchange Online Progress



Agenda

Integrated Workplace Management System

- H. Gonzalez

Loyola Digital Experience/Email in the Cloud Pilot Results

- S. Malisch, D. Vonder Heide, J. Sibenaller

Key Upcoming Technology Changes

- B. Montes, J. Sibenaller

Key Upcoming Technology Changes

Technology	Phase	Sponsor	Details
Parlance Voice System	Live	ITS	Jan 2019
iPlan Phase 2 (LOCUS Bolt-on)	Live	Bursar	Feb 2019
Plan by Requirements (LOCUS)	Live	Student Academic Svcs/Reg & Rec	Feb 2019
Room Scheduling via 25Live (Cloud)	Testing	Student Academic Svcs/Reg & Rec	Mar 2019
IWMS	Final Approvals (post RFP)	Facilities	April/May kickoff planned
Password Manager via LastPass	Configuration	ITS	April/May launch
Preferred Names	Analysis	Student Development	Capabilities will be identified by May
Email in the Cloud	Extended Pilot	ITS	Summer 2019 deployments
Course Evaluation System	Contract (post RFP)	Provost/OIE	Smart Evals recommended
Online Survey Tool	Contract (post RFP)	ITS	Qualtrics recommended
Jobs, Internships & Student Employment/ Federal Work-Study	RFP Results	Career Services	Handshake is the leader/favorite
Expense Management	RFP	Finance	Top 3 solutions identified
Course Scheduler	RFP	Student Academic Svcs	Waiting on RFP's to come in
Study Abroad Administration	Scope (pre RFP)	OIP	Identifying budget
Council for Student Success Technology Subcommittee	Committee	Student Academic Svcs	Researching student communication practices

ITS Major Initiatives - FY19 Q3-Q4

Academic and Faculty Support

- LOCUS Enhancements (8)
- **Implement SONIA Field Management Software**
- **Sakai 12 Upgrade**
- Faculty Info System - Modifications for Collective Bargaining Agreement
- Emergency Contact in RMS/Mercury using Person Flags
- Course Evaluation Replacement
- JIT Faculty Training for Online Teaching
- Follett Integration with Sakai

Infrastructure

- Campus Construction Initiatives (4)
- Information Security Program (16)
- IT Disaster Recovery (8)
- LUHS/LUC/HSD Technology Program (1)
- JFRC Assessment of Lake Side Technology
- **Mac OS Computer Mgmt Application**

Administrative Initiatives

- Lawson/Kronos Enhancements (11)
- LDE Foundation: Collaboration and Security (5)
- **OIP Study Abroad Application via Slate**
- Advancement Systems (2)
- Academic Room Scheduling Interface Review
- Space and Asset Mgmt - Search and Implementation (2)
- Transition 25Live to the Cloud
- iPlan - Major Re-write
- Council of Regents Website Modifications

Student Technology Support

- LOCUS Fluid Page Rollouts
- Preferred Name for Students – Discovery
- Writing Placement Infrastructure
- **Student Conduct & Concerns System (Maxient)**
- Rambler Link Software - Search and Implementation
- WebCheckout Upgrade

Continuous Service Development

- Business Intelligence/Data Warehouse (10)
- Enterprise Content Management (4)
- **Secure Submission of W-9 Form for Accounts Payable Department**
- **Implement Proto-Call for After Hours Mental Health Services**

2019 ITESC Schedule

February 27, 2019 - Tuesday, 1:00-3:00 PM

- Integrated Workplace Management System
- Loyola Digital Experience/Email in the Cloud Pilot Results
- Key Upcoming Technology Changes

April 30, 2019 - Tuesday, 1:00-3:00 PM

-

June 20, 2019 - Thursday, 1:00-3:00 PM

- Project Portfolio Prioritization

August 15, 2019 - Thursday, 1:00-3:00 PM

-

October 1, 2019 - Tuesday, 1:00-3:00 PM

-

December 12, 2019 - Thursday, 1:00-3:00 PM

- Project Portfolio Prioritization