

# Loyola University Chicago

## ITS Major Initiatives - FY19 Q1-Q2

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### Academic and Faculty Support

- LOCUS Enhancements (6)
- Evaluate SONIA Field Management Software
- PROLAW Scholars Network Application and Database
- Hybrid On-line ABSN Degree Program
- Examity Integration with Sakai

### Infrastructure

- Campus Construction Initiatives (4)
- Information Security Program (6)
- LUHS/LUC/HSD Technology Program (2)
- IT Disaster Recovery (9)

### Administrative Initiatives

- Lawson/Kronos Enhancements (11)
- Advancement Systems (2)
- Space and Asset Management - System Search and Implementation
- Transition 25Live to the Cloud
- iPlan - Major Re-write
- Quinlan CRM
- Online Performance Management System - Phase 2

### Student Technology Support

- LOCUS Fluid Page Rollouts
- Upgrade Campus Card System

### Continuous Service Development

- Business Intelligence/Data Warehouse (7)
- Enterprise Content Management (3)
- Secure Documents for Financial Aid

*anywhere  
anytime*  
**accessLUC**

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## Health Legend

Green – On Target, No Risk
Lime – On Target, Minimal Risk, Minor Concerns, Under Control
Yellow – Target in Jeopardy, Risks Being Managed, Unknowns Exist
Orange – Slightly Off Target, Several Risks or Unknowns
Red – Off Target, High Risk, Multiple Concerns



## ACADEMIC AND FACULTY SUPPORT

<b>LOCUS Enhancements (6)</b>	Sponsor: Academic Affairs – Margaret Callahan Project Manager: Larry Adams & Charlotte Pullen	Health	
		Prior	Current
<b>Institutional Impact:</b> Continued enhancements to the Student System set of modules (LOCUS) that address the central student and faculty needs for Loyola.			
<b>Recent Activity:</b> Two FA-related projects (2635-J-Term Tuition Benefits; 2605 Award Letter AY2019) have had significant progress. Three of four Advising-related projects (2691-What-If Report; 2692-Advising Notes; 2693-My Planner) are nearing deployment ready. Student Engagement & Persistence Pilot (2584) was initiative from last Fall - need to confirm it is cancelled.			
<b>Next Steps:</b> Finalize AY 2019 aid activities; Deploy requested Advising tools.			
<b>Evaluate SONIA Field Management Software</b>	Sponsor: School of Social Work – Goutham Menon Project Manager:	Health	
		Prior	Current
<b>Institutional Impact:</b> Improve functionality for field placement for 250 Social Work students per year; Evaluate needs for other schools for internships, service learning, etc.			
<b>Recent Activity:</b> Initial training for SSW completed; Install of test system near completion; Plan for production deployment in place.			
<b>Next Steps:</b> Finalize production deployment; Plan evaluation process for other schools, as appropriate.			
<b>PROLAW Scholars Network Application and Database</b>	Sponsor: School of Law – William Loris Project Manager: Cheryl Heckel	Health	
		Prior	Current
<b>Institutional Impact:</b> Provide a website for potential students and donors to review the PROLAW program and demonstrate the real impact that alumni are having with these accomplishments. Potential donors, governments, international organizations, peace-keeping missions and non-governmental organizations can contact the alumni directly furthering the mission of PROLAW.			
<b>Recent Activity:</b> Client reassessed their use of the site and the additional approvals they will need from each ProLaw Scholar before their information can be presented on the site. ITS offered assistance in defining what would be needed for GDPR. On 9/4, client indicated they are ready to move forward with deploying the site to production.			
<b>Next Steps:</b> Receive user acceptance testing signoff, and Implement site in production. Anticipated go-live is mid-September.			
<b>Hybrid On-Line ABSN Degree Program</b>	Sponsor: School of Nursing – Vicki Keough Project Manager: Larry Adams	Health	
		Prior	Current
<b>Institutional Impact:</b> Expansion of Nursing Accelerated BSN program to Hybrid (online theory and in person clinical) with Orbis Education, as partners.			
<b>Recent Activity:</b> Extract of data for online testing service complete and in production.			
<b>Next Steps:</b> Determine if other data/reports needed; close project.			
<b>Examity Integration with Sakai</b>	Sponsor: Provost Office – Jo Beth D'Agostino Project Manager: Florence Yun	Health	
		NEW	Current
<b>Institutional Impact:</b> Enhance the integrity of LUC's online programs and improve Loyola's position to meet future accreditation requirements.			
<b>Recent Activity:</b> Tested and completed the integration of Examity into the Sakai production environment; developed training modules and documentation to support instructors teaching and for students enrolled in online courses that will utilize the service.			
<b>Next Steps:</b> None, Completed.			

## ADMINISTRATIVE INITIATIVES

<b>Lawson/Kronos Enhancements (6)</b>	Sponsor: Human Resources – Danielle Hanson / Finance – Becky Gomez Project Manager: John Schleibinger & Mary Bunker	Health	
		Prior	Current
<b>Institutional Impact:</b> : Ongoing improvement projects for Enterprise Resource Planning (ERP) software which includes Budgeting and Planning, HR, Payroll, Accounting, Grant Management, Supply Chain and Expense Management.			
<b>Recent Activity:</b> Requirements gathering and analysis in progress for 403(b) census file program changes in Lawson. Modifications to Blue Cross Blue Shield census file program in Lawson completed and user testing in progress. Requirements analysis and development in progress for Benefit Wallet (HSA) remittance files. Bug fix to Hyatt census file program in Lawson is complete. Requirements gathering in process for Flexible Spending and Dependent Care account remittance files for MyBenefitsExpress. Modifications to Benefits Enrollment module in Lawson for HSA and related benefits has been complete and is being tested. Still awaiting file requirements for Reliance Critical Illness and Voluntary Group Accident census files.			
<b>Next Steps:</b> 1) Finish Benefits Enrollment testing and implement in production. 2) Complete census and remittance file changes for Hyatt, Blue Cross Blue Shield, Reliance, MyBenefitsExpress and Benefit Wallet.			
<b>Online Performance Management System Phase II</b>	Sponsor: Human Resources – Winifred Williams Project Manager: Cheryl Heckel	Health	
		Prior	On Hold
<b>Institutional Impact:</b> Improvements to the performance management system to provide a better tool for assessment of employee performance.			
<b>Recent Activity:</b> Client requested that Phase II be placed on hold temporarily.			
<b>Next Steps:</b> Await next steps from client.			
<b>Advancement Systems (2)</b>	Sponsor: Advancement – Jamie Orsini Project Manager: John Schleibinger	Health	
		Prior	Current
<b>Institutional Impact:</b> Ongoing improvements for alumni, donor, prospect, and events management systems to engage with the constituents to better support fundraising goals.			
<b>Recent Activity:</b> Data Loader Parent/Student Load – Analysis, requirements, and planning completed. Advancement was given approval to move forward with the contract/implementation process with Ruffalo Noel Levitz (RNL). Funding for the project will be a combination of exiting ITS budget for SmartCall and the additional funding as required from Advancement to cover the total costs. The Infrastructure Team is researching telephony options,			
<b>Next Steps:</b> 1) Complete coding and testing for Parent Student Load. 2) Start reviewing contract with RNL, review phonathon building for VoIP line installation and provide cost.			
<b>Space and Asset Management – System Search and Implementation</b>	Sponsor: Facilities – Kana Henning Project Manager: Warren Francis	Health	
		Prior	Current
<b>Institutional Impact:</b> A space asset management system would be the single source of truth for all space utilization at Loyola University. This space “inventory” system would be updated as spaces are renovated or modified, ensuring accurate data collection at the time that information about space is needed. The new system would become the planning tool for building programming, space assignments, and campus development.			
<b>Recent Activity:</b> Three vendors were selected from the RFP for vendor demonstrations. All vendors and vendor demonstration locations are now confirmed. IT team is meeting to discuss integration with other applications and the impact it could have.			
<b>Next Steps:</b> 1) Conduct vendor demonstrations, 2) Select final vendor.			
<b>iPlan - Major Re-write</b>	Sponsor: Bursar – John Campbell Project Manager: Larry Adams/Michelle Dayton/John McGivney	Health	
		Prior	Current
<b>Institutional Impact:</b> Package potential improvements to installment plan LOCUS module into projects with high-level requirements and resource estimates; Develop implementation plan for improvements.			
<b>Recent Activity:</b> Three project groupings identified. 1) Reconciliation processes in Production. 2) Student-facing budget wizard – development begun. 3) Miscellaneous - TBD.			
<b>Next Steps:</b> Continue with second project grouping – Budget Wizard improvements. Evaluate third project grouping.			

## ADMINISTRATIVE INITIATIVES

Quinlan CRM	Sponsor: Laura Zbella Project Manager: John Schleibinger / Warren Francis	Health	
		Prior	Current
<b>Institutional Impact:</b> The Business Leadership Hub is in need of a customer relationship management system (CRM) for the current 4 centers that make up the Hub as well as the capacity to expand as new centers may come on line in the future. The CRM project would select an appropriate vendor for the Hub's needs, integrate a current database (used by FBC) into the new system as well as various data from an array of spreadsheets and install the system in line with the IT requirements and structure already established at Loyola University Chicago.			
<b>Recent Activity:</b> 1) Finalized two out of three contracts. Currently waiting on Salesforce MSA. 2) Team started implementation strategies with implementation partner. 3) Discussed sharing of data between Quinlan and Advancement.			
<b>Next Steps:</b> 1) Final signature on contracts. 2 Initiate training for IT staff and begin implementation phase with Bowfin.			

  

Transition 25Live to Cloud	Sponsor: Kris Daggett / Dawn Collins Project Manager: Larry Adams / Warren Francis	Health	
		NEW	Current
<b>Institutional Impact:</b> Vendor (CollegeNet) is forcing all customers to move to cloud (SAAS) by 12/31/2018.			
<b>Recent Activity:</b> Negotiation of the contract complete. Starting the implementation planning			
<b>Next Steps:</b> Begin work with vendor to transition from on-premise to cloud; Vendor recommends 3 month transition.			

## STUDENT TECHNOLOGY SUPPORT

<b>LOCUS Fluid Page Rollouts</b>	Sponsor: Academic Affairs –Not Yet Identified Project Manager: Larry Adams & Charlotte Pullen	Health	
		NEW	Current
<b>Institutional Impact:</b> LOCUS upgrade provides a new user interface capability (Fluid) and new features to the student system to be introduced after the technical upgrade. This upgrade also changes the software delivery mechanism to PeopleSoft Update Manager (PUM), which will allow selective feature adoption and clearer dependency constraints.			
<b>Recent Activity:</b> Technical upgrade projects closed out as of 4/30/2108. Working group created and meeting schedule planned.			
<b>Next Steps:</b> 1) Begin to plan subsequent projects with functional project management team and new PSS. 2) Plan for quarterly image releases – Image 10 scheduled for 10/14/18. 3) Evaluate long term strategy for iHub. 4) Learn capability and roll-out new functionality, as appropriate.5) Defer automated testing tool to late-2018 or 2019.			
<b>Upgrade Campus Card System</b>	Sponsor: Campus Safety – Tom Murray Project Manager: Jamie Herrera	Health	
		NEW	Current
<b>Institutional Impact:</b> Due to proprietary use, their age, and the availability to stock and maintain this equipment the card reader infrastructure is being refreshed with standards-based hardware that will enable different type of manufacturers of ID cards to be used with this system.			
<b>Recent Activity:</b> The following buildings were refreshed over the summer break: Cudahy Library, Mundelein, Ignatius House, Arrupe, Gonzaga, Hopkins House, Campion, Fairfield, Regis, San Francisco and CFSU.			
<b>Next Steps:</b> Finalizing with Campus Safety the buildings that can be refreshed over the fall semester that will have minimal impact to the Loyola community.			

## INFRASTRUCTURE

<b>IT Disaster Recovery (9)</b>	Sponsor: Enterprise Project – Margaret Callahan/Tom Kelly/Wayne Madgziarz/Susan Malisch Project Manager: Jim Sibenaller	Health	
		Prior	Current
<b>Institutional Impact:</b> Timely restoration of key university technology services in the event of a disaster or severe outage.			
<b>Recent Activity:</b> Tier 1 remaining scope identified at the ITESC meeting. The annual process to review and update the existing DR plans is active; 12 plans under review, 5 plans are current; 3 are under construction.			
<b>Next Steps:</b> 1) Keep existing DR plans current. 2) Complete Tier 1 planning. 3) Complete BC planning.			
<b>LUHS/LUC/HSD Technology Program (2)</b>	Sponsor: Enterprise Project – Margaret Callahan/Tom Kelly/Susan Malisch Project Manager: Dan Vonder Heide	Health	
		Prior	Current
<b>Institutional Impact:</b> Migration of HSD buildings to LUC network; continues separation of services from LUMC while keeping opportunities for collaboration as appropriate across entities.			
<b>Recent Activity:</b> The 5 computers used by the Informatics server/development team are the only user PCs that remain. These will be migrated after all remaining HSC Informatics servers have been migrated to the LUC network. Planning meeting to migrate servers set for mid-October.			
<b>Next Steps:</b> 1) Work with Informatics to migrate HSC servers and other resources off the LUHS network and onto the LUC network infrastructure. 2) After server migration complete the remaining Informatics team PC migration.			
<b>Campus Construction Initiatives (4)</b>	Sponsor: Facilities – Kana Henning Project Manager: Dave Wieczorek	Health	
		Prior	Current
<b>Institutional Impact:</b> Plan, oversight and installation of appropriate technology for various construction projects managed by Facilities.			
<b>Recent Activity:</b> 1) School of Social Work moves completed. 2) Arrupe art student completed. 3) Cubicles completed in Lewis Towers.			
<b>Next Steps:</b> 1) Move Phonathon to CFSU. 2) Move 6-8 staff from Math department to Alumni House. 3) Move SSWD tutoring and testing to Lewis Towers 12 <sup>th</sup> floor.			
<b>Information Security Program (6)</b>	Sponsor: Enterprise Project – Susan Malisch Project Manager: Jim Pardonek	Health	
		Prior	Current
<b>Institutional Impact:</b> Risk mitigation and management associated with the confidentiality, integrity and availability of university protected and sensitive information.			
<b>Recent Activity:</b> Overall program health remains Lime; several projects and operational tasks continue to contain risks and have missed deadlines. General Security Awareness participation remains below expectations, Proposal for mandatory compliance tracking improvement forwarded to management but not yet funded. Mandatory HIPAA training is in progress. PII compliance efforts remain for 2018 on track at all major campuses, expansion to LUREC and Cuneo under discussion. DLP TAC near completed and proposed solutions presented. Replacement of End of Life LSA near complete with 90% of all users migrated to the new platform. PCI-DSS annual assessment over 70% complete. GDPR support effort continuing.			
<b>Next Steps:</b> 1) Continue with security awareness, GDPR, PII and PCI activities. 2) Complete implementation of LSA Replacement. 3) Implement for DLP technology. 4) Complete PCI-DSS Assessment.			

## CONTINUOUS SERVICE DEVELOPMENT

Business Intelligence/Data Warehouse (7)	Sponsor: Dr. Rooney/Wayne Madgziarz/David Slavsky Project Manager: Tony Vavarutsos	Health	
		Prior	Current
<p><b>Institutional Impact:</b> Improve access, availability, reporting and data analyses for enterprise data coming from many disparate sources (such as LOCUS, SAKAI, Slate) to inform planning and strategic decisions at Loyola.</p>			
<p><b>Recent Activity:</b> In collaboration with OIE and Finance, an "Academic Program Revenue to Expense" data model was developed. Introductory training was provided to Deans and Cabinet in August. Follow-up sessions are underway with Deans and business managers. 2) One meeting with the BISC committee. Discussed the process of project intake and priority assignment. 3) Clearing House report as per NSC specs is complete. The data is now automatically generated (4 times per term) and uploaded. The Registrar has now assumed the responsibility of correcting any student data related errors. The OIE (IR) department is no longer involved in the process. 4) WebFOCUS conversion from 7.6 to 8.0 is complete. 5) Work continues with Advancement on the top 10 priority Executive BI reports and dashboards that were identified. The DataLoader project is complete for student degree data submission; The AIS team completed WebFOCUS and BI technologies training; The Parent data load project has begun which loads the data of the parents of the incoming fall class, into Advancement. 6) Data model is developed for use of the Division of Student Development (DSD) department. It includes key academic data that they track for their student services. Training is scheduled. 7) Multiple Power BI data models were developed and deployed. These include, Year over Year Enrollment, Cohort Enrollment Tracking and Loyola Orientations tracking. 8) Multiple Power BI projects for the Bursar and Finance have commenced for the Student Indebtedness initiative. 9) Work has begun on developing dashboards for ITS usage: ITS Annual Summary Dashboard and Information Technology Scorecards</p>			
<p><b>Next Steps:</b> 1) Retire RDS and WebFOCUS 7.6 system as soon as the system purchased by UMC (Emma) is in production. 2) Develop the ETL to extract data from, Advocate (Judicial) and Panopto systems. 3) Brand and Market our BI technologies to facilitate University adoption. 4) Develop reports for new On-line Performance Review system being built for HR. 5) Work with IR to create data for submission to Illinois Longitudinal Data System. 6) Promote usage of the Power BI platform (Microsoft complete BI suite) to our end users and departments. 7) Work with new AIS team to complete the remaining priority reports and dashboard.</p>			
ECM/Imaging Implementation (3)	Sponsor: Enterprise Project – Susan Malisch Project Manager: John Schleibinger	Health	
		Prior	Current
<p><b>Institutional Impact:</b> Improve/streamline student services and interdepartmental process efficiency while also reducing paper usage.</p>			
<p><b>Recent Activity:</b> The following implementations went live during the period: 1) DocFinity upgrade from 10.13.5 to version 11.2.2 (along with migration to newer servers), Contracts Enhancements. 2) Active projects include Records Retention, Payroll Services, BES Professional Development, HR Requisition Workflow Update, Upgrade DocFinity from 11.2.2 to 11.3.2 (fixes a scanning bug).</p>			
<p><b>Next Steps:</b> 1) Complete upgrade to Version 11.3.2, 2) Complete Go-lives' for projects 'on-hold' due to upgrade bugs.</p>			
Secure Documents for Financial Aid	Sponsor: Paul Roberts Project Manager: Cheryl Heckel	Health	
		NEW	Current
<p><b>Institutional Impact:</b> A secure method for students to upload financial documents to Loyola is needed to reduce the risk of confidential information being accessed through hacked email. Providing a site that will allow students and their parents or guardians to upload documents securely will streamline the process of indexing and interfacing the documents directly into DocFinity.</p>			
<p><b>Recent Activity:</b> Application development was completed, and site was provided to clients for their review. During testing, clients requested a modification to the application to first merge all of the student's uploaded documents before interfacing to DocFinity. We have proposed an alternate DocFinity-based solution, and demo to clients the week of 9/4.</p>			
<p><b>Next Steps:</b> Provide demo to clients. If clients agree on solution, receive final UAT signoff and deploy to production.</p>			