ITS Executive Steering Committee (ITESC)

Agenda and Materials – August 13th, 2020
Agenda

Start of School Update
  • D. Vonder Heide, D. Fitzgerald

EAB Student Success Platform
  • P. Roberts, D. Fitzgerald

Loyola Digital Experience Schedule Progress
  • D. Vonder Heide, D. Fitzgerald

Faculty Administration Re-architecture Strategy
  • S. Malisch, J. Sibenaller

ITS Portfolio Prioritization Review
  • S. Malisch, J. Sibenaller
Start of School Update

Support

• **Training**
  - Attendees – 1,394
  - Total Sessions Offered - 64
  - Unique Sessions Topics - 50

• **Faculty Consultations**
  - Drop-In’s - 152

• **Service Desk**
  - Total Calls – 17,307/9,903/3,265
  - Sakai Calls - 1407
  - Fall Hours
    - Monday – Thursday: 8:00AM – 8:30PM
    - Friday: 8:00AM – 7:00PM
    - Saturday/Sunday: 8:00AM – 1:00PM

• **Increased Use of “Soft Phones” for Campus Offices**

Sample Training Sessions:
- Getting Started with Sakai
- Panopto and Zoom
- Sakai Deep Dive: Gradebook
- Recording and Editing in Panopto
- Making Your Zoom Meeting More Secure
- Sakai Deep Dive: Tests & Quizzes
- Introduction to Respondus
- Using Qualtrics
- Building New Skills with Hoonuit
- Getting Started with Learning Analytics Report
Start of School Update

Teaching & Learning Projects/Tools

• Dual Mode Classrooms
  • LSC – 26
  • WTC – 7
  • HSC – 11
• Digication
  • e-portfolio
• Sakai Upgrade
  • Enhancements in Assignments, Tests and Quizzes and Gradebook
  • Winter Break Deployment
• Labster
• Hands-On-Learning (HOL)
• Respondus
• Proctortrack
• Adobe
Start of School Update

Process

• Loan Program
  • Technology Continuity
• Webinar Assistance
  • Zoom Meetings: 211,135
  • Participants: 1,598,108
  • Webinars: 365
  • Attendees: 27,417
• Increased collaboration across LSC, WTC, HSC for all offerings
## Start of School Update

### Integration and Application Changes

<table>
<thead>
<tr>
<th>Office/Department/Unit</th>
<th>Action</th>
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<tr>
<td>Campus Recreation</td>
<td>Modified the extract to LOCUS to allow for no activity fee</td>
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<tr>
<td>Wellness Center</td>
<td>Modified the extract to LOCUS to allow for no activity fee</td>
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<tr>
<td>Campus Card</td>
<td>Implemented “Get” for self-service photo submission, including the downstream photo processes</td>
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<tr>
<td>Residence Life</td>
<td>Assisted with Room Move-in Date Selection processing and will need to assist with refund processing</td>
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<tr>
<td>Student Academic Services</td>
<td>Upgraded Zoom plugin and added Law to eligible students</td>
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<tr>
<td>Registration &amp; Records</td>
<td>Re-enabled paper transcripts</td>
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<tr>
<td>Student Development</td>
<td>Developed UPass Opt-Out application</td>
</tr>
<tr>
<td>Wellness Center</td>
<td>Applied student health insurance updates</td>
</tr>
</tbody>
</table>
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EAB Navigate: Value and Impact

• Student Retention
  – Advanced search – identify student groups at risk in granular fashion
  – Academic planning – shared workspace between student and advisor; increase efficiency with sequenced course suggestions; potential to reduce time to degree

• Advisor/Staff Workflow Improvement
  – Student profile – synthesize many different LOCUS screens
  – User-friendly advising notes – improves consistency and workflow within and across units

• Student User Experience & Communication
  – Easy appointment scheduling – reduces friction
  – Targeted email and texting campaigns - provides seamless pipeline to advising
EAB Navigate: Value and Impact

Baker-Tilly Report on Student Success and Retention (April 2019)

- **Recommendation: Data-driven decision-making on student success programming and initiatives.**
  - EAB will provide a new source of data through intake forms, quick polls, appointment reports, and advanced search functionality.

- **Recommendation: University visibility into advisor workload and consistency of advising services.**
  - EAB provides a platform to view more accurate data.

- **Recommendation: Strategic student communication about student success information.**
  - EAB gives us the opportunity to create strategic campaigns to reach students in targeted ways.

Council for Student Success Technology Subcommittee Report (April 2019)

- **Recommendation: Create “student engagement hub” that would centralize and personalize messaging to make it more student-centric.**
  - EAB serves as this hub. It allows us to create messaging campaigns centrally and personalize them to specific student groups, such as students who have not yet registered or students who are earning a failing grade in a class.
  - It also allows for multiple modes of communication: e-mail, text.
EAB Navigate Student Success Platform

EAB Navigate Phase 1 Implementation

Navigate Staff
Go Live Date: August 3, 2020

Navigate Student

Mobile App
Go Live: mid-August

Academic Planning (Pilot)
Go Live: w/in pilot Fall Univ 101 courses

LOCUS (Student Information System)
--LOCUS remains LUC's source of truth for academic data
--Approximately 100 SQL extracts are interfaced daily to Navigate
What are we implementing again?

• Navigate Staff: Go Live Date – August 3rd
  
  – **Phase 1 Users**: Professional Advisors & staff from undergraduate academic advising areas.
    
    – *Future phase users will include faculty advisors and different administrative staff users (student affairs, HUB, etc.)*

  – **Phase 1 Functionality**: Student profile, Advanced Search, appointment scheduling & calendar integration, robust communication features.

    – *Future phase functionality will include progress reports, grade alerts, and case management.*
Student Profile Sample

Psychology
Bachelor of Science
College of Arts and Sciences

Other Major(s)
Biology (Minor)
Minor
College of Arts and Sciences

Major History

STUDENT ID

CLASSIFICATION
Sophomore

MOST RECENT ENROLLMENT
Spring 2020

Staff Alerts
Message Student
Add a Note on this Student
Add a Reminder to this Student
Report an Appointment
Create Request for Appointment
Schedule an Appointment
Add to Student List
Edit User Settings
Impersonate User

Active Appt
Campaigns
Student is not involved in any active campaigns
Advanced Search Sample
What are we implementing again?

• Navigate Student – Mobile App
  - Go Live mid-August
    – **Users:** Undergraduate students who download the app.
    – **Functionality:** App includes content such as Class Schedule, Campus Resources & Events, Holds, To Do’s, student-initiated appointment scheduling that integrates with Navigate Staff
What are we implementing again?

- **Navigate Student – Academic Planning – Go Live with start of Univ 101 classes**

  - **Phase 1 Pilot Users:** Students in ~5 Univ 101 classes and their instructors/advisors.

  - **Phase 1 Functionality:**
    - Building academic plans from course-sequenced templates.
    - Collaborative digital workspace for students & advisors.

  *Future phase functionality: schedule building & registration*
After Go Live ... What’s Next?

• Production Support
  • Assist with issues & questions
  • Ongoing training for new advisors

• Start Planning for Phase II!
  • Nav Staff – new users, new functionality
  • Academic Planning – schedule building & registration pilot
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Loyola Digital Experience Digital Assistant/Chatbot

Complete
  • Chatbot Production Infrastructure Deployment

In Progress
  • Chatbot Setup Enhancements
    • Automated Security Sync – expand access to all students
    • Non Authentication Security – expand access for guests
    • Add LU’ie on additional LUC web pages

Future Projects
  • Explore Chatbot for COVID-19
  • Deploy the Digital Assistant/Chatbot within Human Resources
  • Placeholder - Chatbot for Financial Assistance
  • Placeholder - Chatbot Expansion for ITS Service Desk
  • Placeholder - Chatbot for Academic Advising
Meet LUie! LUie is our intelligent enterprise digital assistant, or “chatbot”, and with proper credentials provided LUie can answer questions unique to the individual such as “What is my GPA?”. LUie will be available on more LUC web pages to assist students, faculty, staff and visitors with their questions – one key benefit of LUie is that he is “awake” at all hours and will respond to questions regardless of office hours, day of week, time of day! Plans are underway to build out questions and answers for Financial Aid, Academic Advising, Human Resources and the ITS Service Desk.
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Faculty Administration Re-architecture Strategy

Lakeside Faculty Admin Technology

2 primary applications

~10 interfaces
Faculty Administration Re-architecture Strategy

Health Sciences Faculty Admin Technology

2 primary applications

~60 interfaces
Faculty Administration Re-architecture Strategy

Activities & Processes

• Faculty search
• Hiring
• Onboarding
• Contracts
• Letters
• Salary/Salary Adjustments
• Annual Merit File
• Fiscal File
• Annual Evaluation Process
• Promotion & Tenure
• AAMC Faculty Salary Report
• Faculty Reporting

• Demographic administration
• Roster & workload
• Appointments
• Licensure
• Compliance
• Faculty Directory
• Publications/Scholarly Works
• Faculty Marketing Approval
• Ties to Research
• Grants
• Retirement Status
• FIS/FAS/Faculty Master
<table>
<thead>
<tr>
<th>Activity/Process</th>
<th>Lakeside Faculty Administration</th>
<th>HSC Faculty Administration</th>
<th>Destination System</th>
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</thead>
<tbody>
<tr>
<td>(Daily) Update faculty data</td>
<td>Lakeside Faculty Information System</td>
<td>HSC Faculty Master</td>
<td>Lawson, HSC Faculty Information System, etc.</td>
</tr>
<tr>
<td>• New faculty, salary changes, leaves, promotions, etc.</td>
<td>• Core, Salary Budget Module, Supplemental Salary, Part-Time Stipends *Some processes can be addressed by Interfolio</td>
<td>*Some processes can be addressed by Interfolio</td>
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<tr>
<td>Annual Evaluation process</td>
<td>Manual process administered by schools/colleges (paperwork)</td>
<td>HSC Faculty Information System</td>
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<td>*Can be addressed by Interfolio</td>
<td>*Can be addressed by Interfolio</td>
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<tr>
<td>Annual Merit File, Fiscal Year File</td>
<td>Modified data export from Lakeside Faculty Salary Planning</td>
<td>Modified data export from HSC Faculty Master, HSC Faculty Salary Planning</td>
<td>Lawson</td>
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<tr>
<td>Promotion/Tenure process</td>
<td>Email, Sakai</td>
<td>Email, Sakai</td>
<td>Manual updates in Lakeside FIS, HSC Faculty Master* (need to confirm with Michelle) *Can be addressed by Interfolio</td>
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<tr>
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<td>*Can be addressed by Interfolio</td>
<td>*Can be addressed by Interfolio</td>
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<td>Hiring process</td>
<td>PeopleAdmin</td>
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<td>*Can be addressed by Interfolio</td>
<td>*Can be addressed by Interfolio</td>
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<td>Faculty Contracts/Merit Letters</td>
<td>Manual process* (need to confirm with Anne)</td>
<td>HSC Faculty Contracts System</td>
<td>HSC Faculty Information System, Lakeside - ???* (need to confirm with Anne)</td>
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<td>AAMC Faculty Salary Report</td>
<td>N/A (HSC only)</td>
<td>Modified data export from HSC Faculty Master</td>
<td>AAMC* (how transmitted? -- need to confirm with Michelle)</td>
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</table>
Faculty Administration Re-architecture Strategy

**Needs driven by One Loyola**
- Reduce manual work
- Fill process gaps
- Reduce pain points
- Common processes
- Integrated workflow
- Shared integrated technology
- Common/singular data set

**Execution**
- Analyze current state
- Design for the future
  - Single set of technology solutions
- Iterative approach/multiple releases
- Project management
- Engage Schools
- Manage change
- Communicate
Faculty Administration Re-architecture Strategy

Known Technology Components:
- Library Systems
- FIS
- Digital Measures
- FAS
- Interfolio
- Faculty Master

New FAS Technology:
- Lakeside FIS
- HSC FIS
- Interfolio

Interfolio Costs:
- ~$275K-$325K – initial costs
- Implementation
- Consulting/Discovery
- Cloud Product x 4
  - $50K-$70K per product
### Faculty Administration Re-Architecture Strategy Timeline - 08/11/2020

<table>
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<tr>
<th>Active Projects</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
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<td>Jul Aug Sep</td>
<td>Oct Nov Dec</td>
<td>Jan Feb Mar</td>
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<td>Dynamic Faculty Database for OIE</td>
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<td>Requirements/Needs/As Is Analysis - Phase I</td>
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<td>Interfolio Negotiation &amp; Contract</td>
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<td>Interfolio Discovery Service</td>
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<td>Review, Promotion &amp; Tenure - Interfolio</td>
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<td>Requirements/Needs/As Is Analysis - Phase II</td>
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<td>Future State Design</td>
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<td>Architectural Decisions</td>
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<td>Iteration 2 - TBD</td>
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<td>Iteration 5 - TBD</td>
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<table>
<thead>
<tr>
<th>Product/Solution Provider</th>
<th>Campus Partner</th>
<th>New</th>
<th>COVID</th>
<th>Renewal</th>
<th>Term</th>
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<td>ProctorTrack - New Service - Review for Provost Office</td>
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<td>Poppulo - Renewal - Review for UMC</td>
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<td>Microsoft Premier Support - Renewal - Enterprise</td>
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<td>Drake Hotel - New Service - Review for Residence Life</td>
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<td>Adobe - New Service for Student Remote Access - Enterprise</td>
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<td>Apporto - Renewal - Enterprise</td>
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<td>Comcast - Termination - Review for Residence Life</td>
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<td>AT&amp;T - Renewal - Long Distance Rates</td>
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<td>AT&amp;T - Renewal - Cross Campus and I2</td>
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<td>Alverno</td>
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<td>CIS SecureSuite (SCAP)</td>
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<td>Get Inclusive</td>
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<td>Student Academic Svcs, Fin Aid, Multi</td>
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<td>Sassafras - Remote Student Access to Specialized labs</td>
<td>School of Business, Multiple</td>
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<td>AssureSign - electronic signature, increment needed for COVID remote requirements</td>
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<td>Infor - Lawson April multi-year renewal (removed Smart Office and MSCM with 2.5% escalator cap)</td>
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<td>Kronos May multi-year renewal (removed educational services)</td>
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<td>iModules May renewal agreement - ITS review provided to Advancement</td>
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<td>SkillSoft July license renewal - ITS review provided to HR</td>
<td>Human Resources</td>
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<td>BlueState Digital July CRM Assessment review provided to Advancement</td>
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<td>Kinetic July Master Agreement - ITS review provided to Conference Services - In Progress</td>
<td>Conference Services</td>
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<td>PeopleAdmin July multi-year renewal - In Progress</td>
<td>Human Resources</td>
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<td>TouchNet July multi-year renewal - In Progress</td>
<td>Finance</td>
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**TOTALS** 19 8 12 1 32
ITS Project Portfolio Review

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<th>Count</th>
<th>Effort</th>
<th>Activity</th>
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<tr>
<td>190</td>
<td>59.6</td>
<td>FY21 Q1-Q2 Portfolio</td>
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<tr>
<td>31</td>
<td>12.3</td>
<td>Newly Added Projects Thru 8/10</td>
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<tr>
<td>221</td>
<td>71.9</td>
<td>Revised FY21 Q1-Q2 Portfolio</td>
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<tr>
<td>59</td>
<td>20.7</td>
<td>Projected Additional Projects Thru 12/31</td>
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<tr>
<td>58</td>
<td>20.1</td>
<td>Projected Completed Projects thru 12/31</td>
</tr>
<tr>
<td>223</td>
<td>72.4</td>
<td>Projected FY21 Q1-Q2 Portfolio Final</td>
</tr>
</tbody>
</table>

- 17% increase over average portfolio count of 190
- 32% increase over average portfolio effort of 55
  - Large and Extra Large projects are normally are 28% of portfolio, this period is 35%
  - Extra Large projects are normally are 9% of portfolio, this period is 23%
FY21 Q1-Q2 ITS COVID-19 Projects

<table>
<thead>
<tr>
<th>Priority</th>
<th>Program Group</th>
<th>T-Shirt Sizing</th>
<th>Status</th>
<th>Est. Compl. (QTR)</th>
<th>Primary Customer</th>
</tr>
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<tbody>
<tr>
<td>A</td>
<td>COVID-19 Emergency Response Governance</td>
<td>XLarge</td>
<td>Active</td>
<td>Q2 FY21</td>
<td>Office of The President</td>
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<tr>
<td>A</td>
<td>Cabinet Dashboard</td>
<td>Medium</td>
<td>Complete</td>
<td>Q4 FY20</td>
<td>Information Technology Services</td>
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<tr>
<td>A</td>
<td>ITS Metrics Dashboard During COVID-19 Pandemic</td>
<td>Medium</td>
<td>Active</td>
<td>Q1 FY21</td>
<td>Office of The President</td>
</tr>
<tr>
<td>M</td>
<td>CARES Student Workflow</td>
<td>Small</td>
<td>Complete</td>
<td>Q4 FY20</td>
<td>Office of The Bursar</td>
</tr>
<tr>
<td>A</td>
<td>Tracking and reporting for the CARES funds</td>
<td>Medium</td>
<td>Complete</td>
<td>Q1 FY21</td>
<td>Finance-Office of VP-CFO</td>
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<tr>
<td>A</td>
<td>Make onboarding process for new hires entirely electronic</td>
<td>Medium</td>
<td>Pending</td>
<td>Q2 FY21</td>
<td>Human Resources: System &amp; Process</td>
</tr>
<tr>
<td>A</td>
<td>LCFS - Electronic Consent Forms - COVID-19</td>
<td>Medium</td>
<td>Complete</td>
<td>Q1 FY21</td>
<td>Loyola Community and Family Services</td>
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<tr>
<td>A</td>
<td>GPEM-LOCUS Interface re-design</td>
<td>Medium</td>
<td>Active</td>
<td>Q1 FY21</td>
<td>Grad &amp; Prof Enrollment Mgmt</td>
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<tr>
<td>A</td>
<td>Enterpise wide lists for UMC communications</td>
<td>Large</td>
<td>Active</td>
<td>Q1 FY21</td>
<td>University Marketing and Communications</td>
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<tr>
<td>A</td>
<td>Wellness Center Telehealth Services Informed Consent Form</td>
<td>Small</td>
<td>Complete</td>
<td>Q4 FY20</td>
<td>Wellness Center</td>
</tr>
<tr>
<td>B</td>
<td>Residence Life-Online Roommate Agreements</td>
<td>Small</td>
<td>On Hold</td>
<td>TBD</td>
<td>Residence Life</td>
</tr>
<tr>
<td>B</td>
<td>Point-n-Click (PNC) Update for Respiratory Symptoms Template</td>
<td>XSsmall</td>
<td>Complete</td>
<td>Q4 FY20</td>
<td>Wellness Center</td>
</tr>
<tr>
<td>A</td>
<td>Case Reporting/Diagnosis &amp; Decision Dashboard</td>
<td>Large</td>
<td>Active</td>
<td>Q1 FY21</td>
<td>Office if the President</td>
</tr>
<tr>
<td>A</td>
<td>Contact Tracer Information Dashboard</td>
<td>XLarge</td>
<td>Active</td>
<td>Q1 FY21</td>
<td>Wellness Center</td>
</tr>
<tr>
<td>A</td>
<td>Go Data solution for Virus Outbreak and Contact Tracing</td>
<td>Medium</td>
<td>Complete</td>
<td>Q1 FY21</td>
<td>Wellness Center</td>
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<tr>
<td>A</td>
<td>Symptom Tracker Application</td>
<td>Large</td>
<td>Complete</td>
<td>Q1 FY21</td>
<td>Enterprise/Multiple</td>
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<tr>
<td>A</td>
<td>Facilitate Bursar agreements for New Freshman in Fall 2020</td>
<td>Small</td>
<td>Complete</td>
<td>Q4 FY20</td>
<td>Bursar's Office</td>
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<tr>
<td>A</td>
<td>Explore Chatbot for COVID-19</td>
<td>Large</td>
<td>Active</td>
<td>TBD</td>
<td>Enterprise/Multiple</td>
</tr>
</tbody>
</table>

June COVID-19 projects represents
- 3.5 FTE total (effort)
- 11% of the ITS project capacity
- 6% of the FY21 Q1-Q2 portfolio

August COVID-19 projects represents
- 5.5 FTE total (effort)
- 17% of the ITS project capacity
- 8% of the FY21 Q1-Q2 portfolio

COVID-19 support represents
- 9.8 FTE total (effort)
- 22% of the ITS support capacity
ITS Project Portfolio Review

Details in Excel Attachment:
*FY21 Q1-Q2 Revised ITS Portfolio Prioritization.xlsx*
2020 ITESC Schedule

March 3rd, 2020 - Tuesday, 1:00-3:00 PM – Cancelled due to COVID-19 Move Online
  ▪ ITESC Committees
  ▪ Calendar View of Major Rollouts
  ▪ Student Communications
  ▪ HSC Phone System

April 28, 2020 - Tuesday, 1:00-3:00 PM
  ▪ COVID-19 Summary
  ▪ LDE Foundation: Collaboration & Security - Revised Schedule
  ▪ Short-Term Technology Planning & Decisions
  ▪ Mid/Long-Term Technology Planning & Decisions

June 18, 2020 - Thursday, 1:00-3:00 PM
  ▪ COVID-19 Maintenance Savings
  ▪ Fluid Development
  ▪ Enterprise learning Hub
  ▪ Project Portfolio Prioritization

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

September 29, 2020 - Tuesday, 1:00-3:00 PM
  ▪ TBD

December 8, 2020 - Tuesday, 1:00-3:00 PM
  ▪ Project Portfolio Prioritization