

ITS Executive Steering Committee (ITESC)

Agenda and Materials – June 20, 2019



Agenda

Project Portfolio Prioritization

- S. Malisch, J. Sibenaller

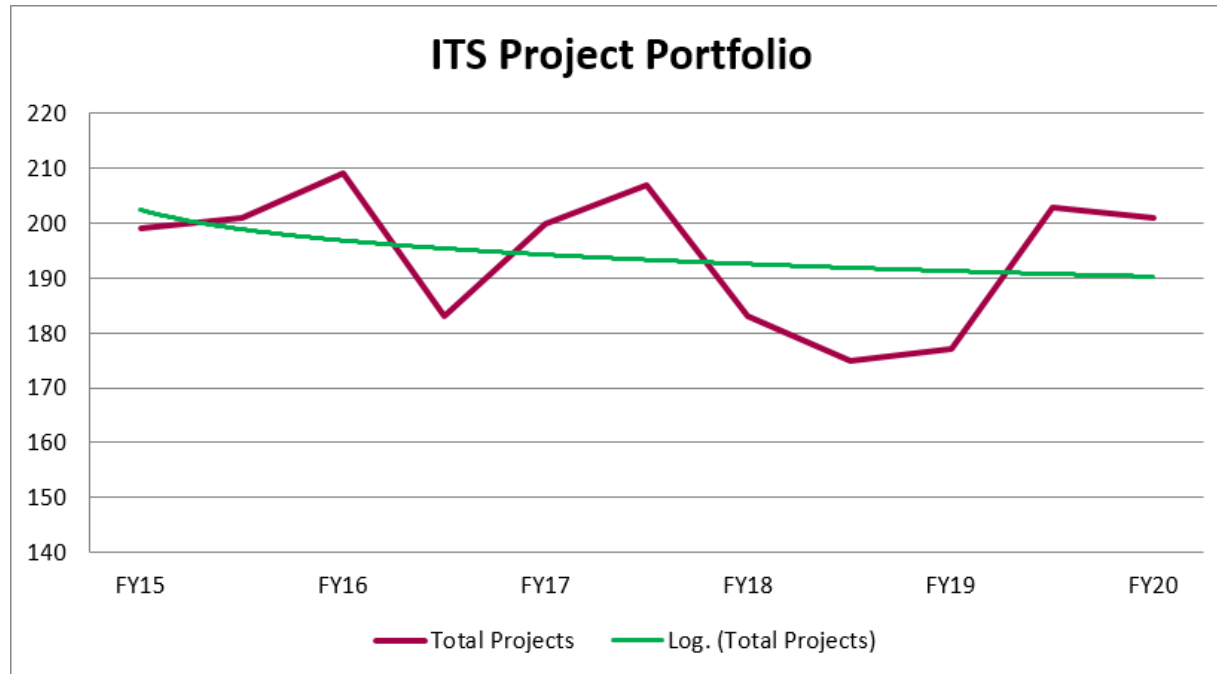
Plan of Record Tracking

POR Activity	Total Count	T-Shirt Sizing Breakdown				
		X-Large	Large	Medium	Small	X-Small
Original FY19 Q3-Q4 POR	203	18	35	96	50	4
Revised FY19 Q3-Q4 POR	203	20	32	97	50	4
New Projects Started	51	4	13	18	14	2
Final FY19 Q3-Q4 POR	254	24	45	115	64	6
Completed Projects	(42)	1	14	13	12	2
Forecasted Completed Projects	(7)	0	3	1	3	0
Duplicate / Canceled	(25)	2	3	13	6	1
Rollover Projects	180	21	25	88	43	3
New Projects not Started	21	1	9	9	2	0
FY20 Q1-Q2 POR (Draft)	201	22	34	97	45	3
Net Change	(2)	4	(1)	1	(5)	(1)

Project Sizing Trend

Portfolio Counts

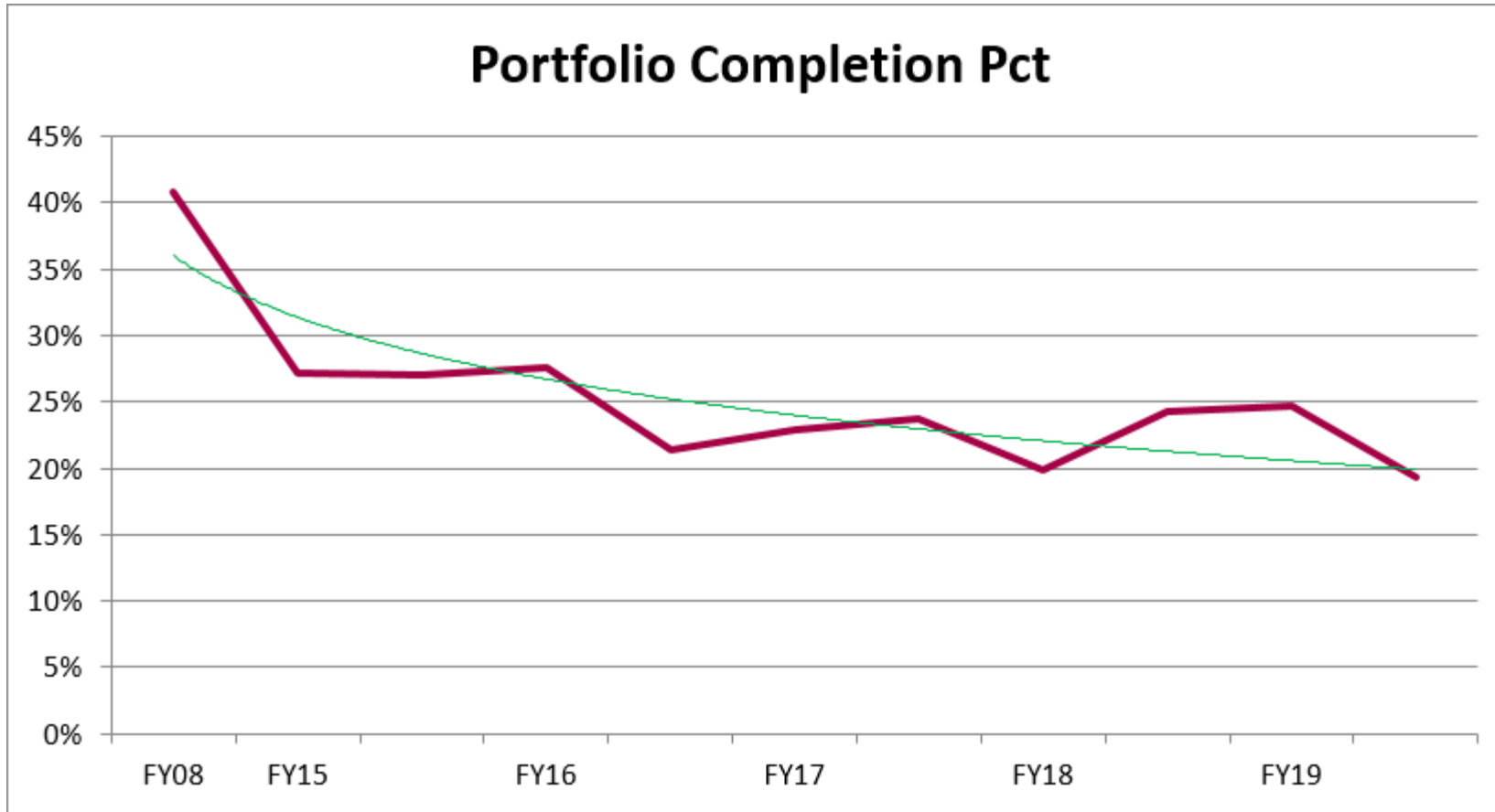
T-Shirt Sizing	Work Effort	FY15 Q3-Q4	FY16 Q1-Q2	FY16 Q3-Q4	FY17 Q1-Q2	FY17 Q3-Q4	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2
TBD	TBD	0	0	0	0	0	0	0	0	0	0
X-Small	< 5 Days	7	8	6	4	4	2	1	1	4	3
Small	5-30 Days	56	55	45	49	48	36	31	40	50	45
Medium	31-60 Days	84	85	80	94	98	96	92	94	96	97
Large	61-120 Days	36	41	37	36	37	34	36	31	35	34
X-Large	>120 Days	18	20	15	17	20	15	15	11	18	22
Portfolio		201	209	183	200	207	183	175	177	203	201
Completed		71	64	48	57	54	44	58	55	49	



	Avg.	Min	Max	This Period
Portfolio	194	175	209	201



Completed Project Forecast



49 projects
forecast
completed
this period

	Avg.	Min	Max	This Period
Completed Pct.	30%	19%	48%	19% (forecasted)



Capacity Estimates

T-Shirt Sizing	Work Effort	Initial Project Count*	Project Effort** (FTE)
TBD	TBD	0	0.0
X-Small	< 5 Days	3	0.1
Small	5-30 Days	45	4.0
Medium	31-60 Days	97	18.7
Large	61-120 Days	34	13.1
X-Large	>120 Days	22	24.4
Total		201	60.3

* snapshot as of 6/17/19

** most likely scenario

ITS Capacity/Resource Calculations (FTE)

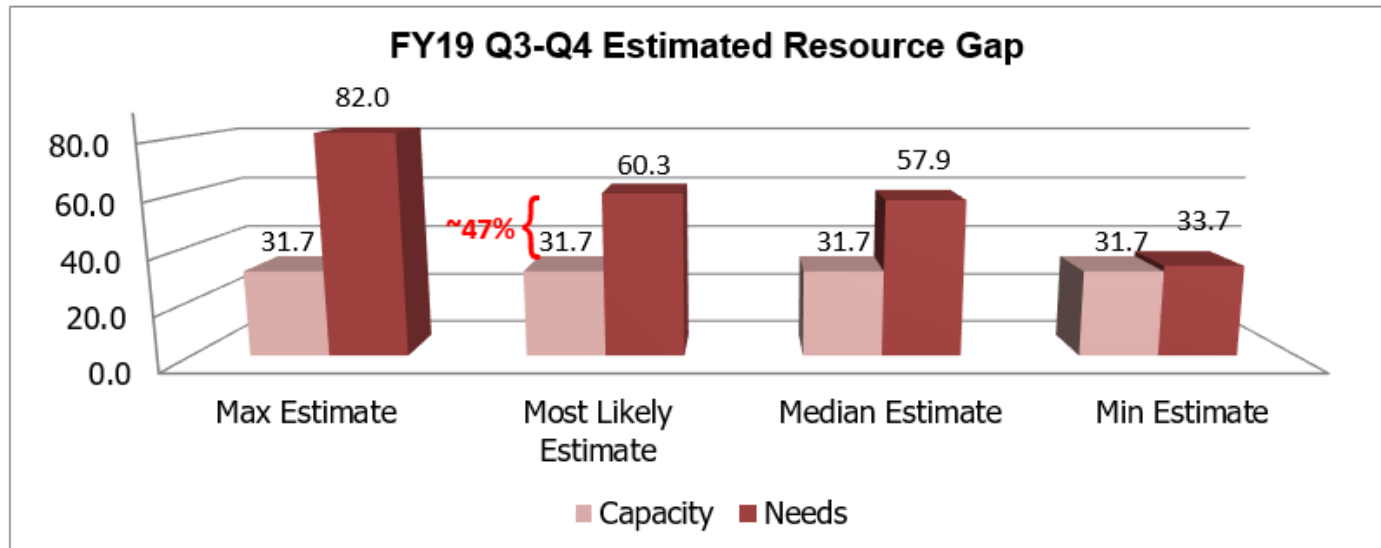
Full Time	101.0
Part Time	1.3
Annual Total	<u>102.3</u>

	Est. Effort Allocation	Est. Time Allocation	Most Likely Estimate Gap
Admin.	26.1	26%	47%
Support	44.4	43%	
Project	31.7	31%	
Total	102.3	100%	

2 FTE increase

- Enterprise Architect
- Bus. Process Analyst

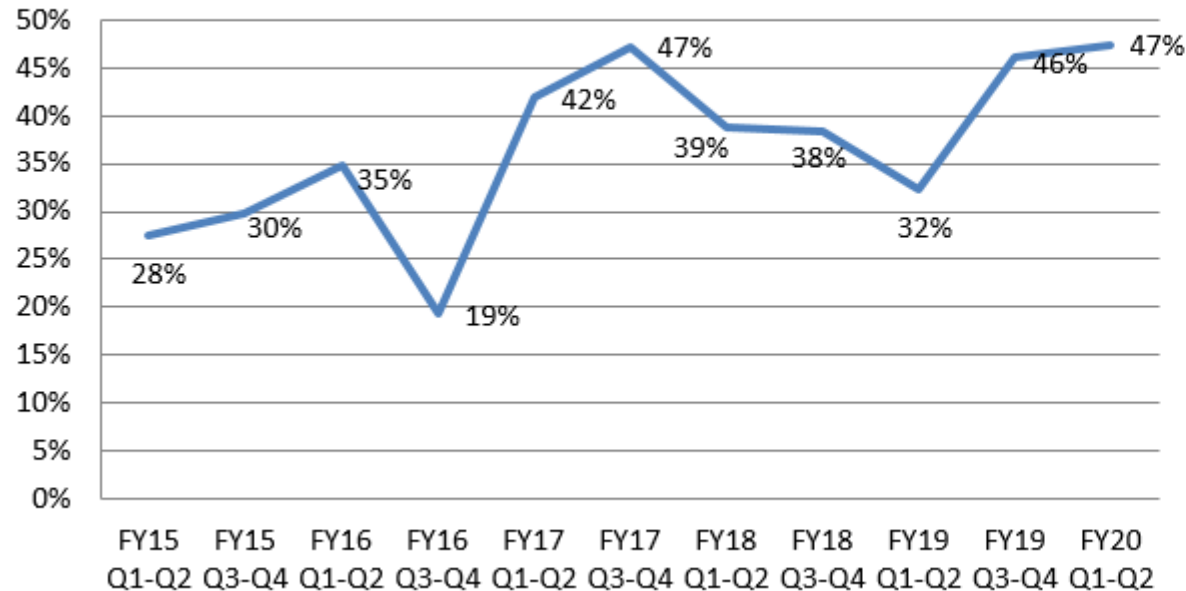
Resulted in a **1.3 FTE or 1% increase in project capacity**



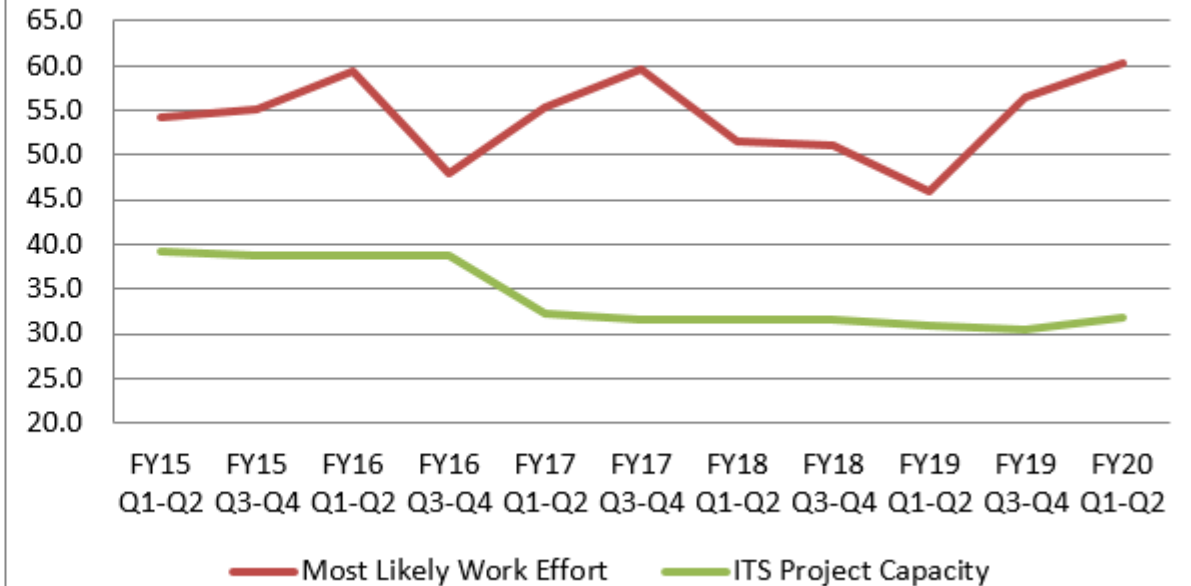
Portfolio Growth Details

	FY15 Q1-Q2	FY15 Q3-Q4	FY16 Q1-Q2	FY16 Q3-Q4	FY17 Q1-Q2	FY17 Q3-Q4	FY18 Q1-Q2	FY18 Q3-Q4	FY19 Q1-Q2	FY19 Q3-Q4	FY20 Q1-Q2	5 Year Avg
Portfolio Count	199	201	209	183	200	207	183	175	177	203	201	194
Portfolio Growth	7%	1%	4%	-12%	9%	4%	-12%	-4%	1%	15%	-1%	
Most Likely Work Effort	54.2	55.2	59.4	47.9	55.3	59.7	51.5	51.0	45.8	56.5	60.3	54.3
Most Likely Work Effort Growth	13%	2%	7%	-24%	13%	7%	-16%	-1%	-11%	19%	6%	
ITS Project Capacity	39.2	38.7	38.7	38.7	32.2	31.5	31.5	31.5	31.0	30.4	31.7	34.1
ITS Project Capacity Growth	2%	-1%	0%	0%	-20%	-2%	0%	0%	-2%	-2%	4%	
Estimated Resource Gap	28%	30%	35%	19%	42%	47%	39%	38%	32%	46%	47%	37%

ITS Project Portfolio Resource Gap

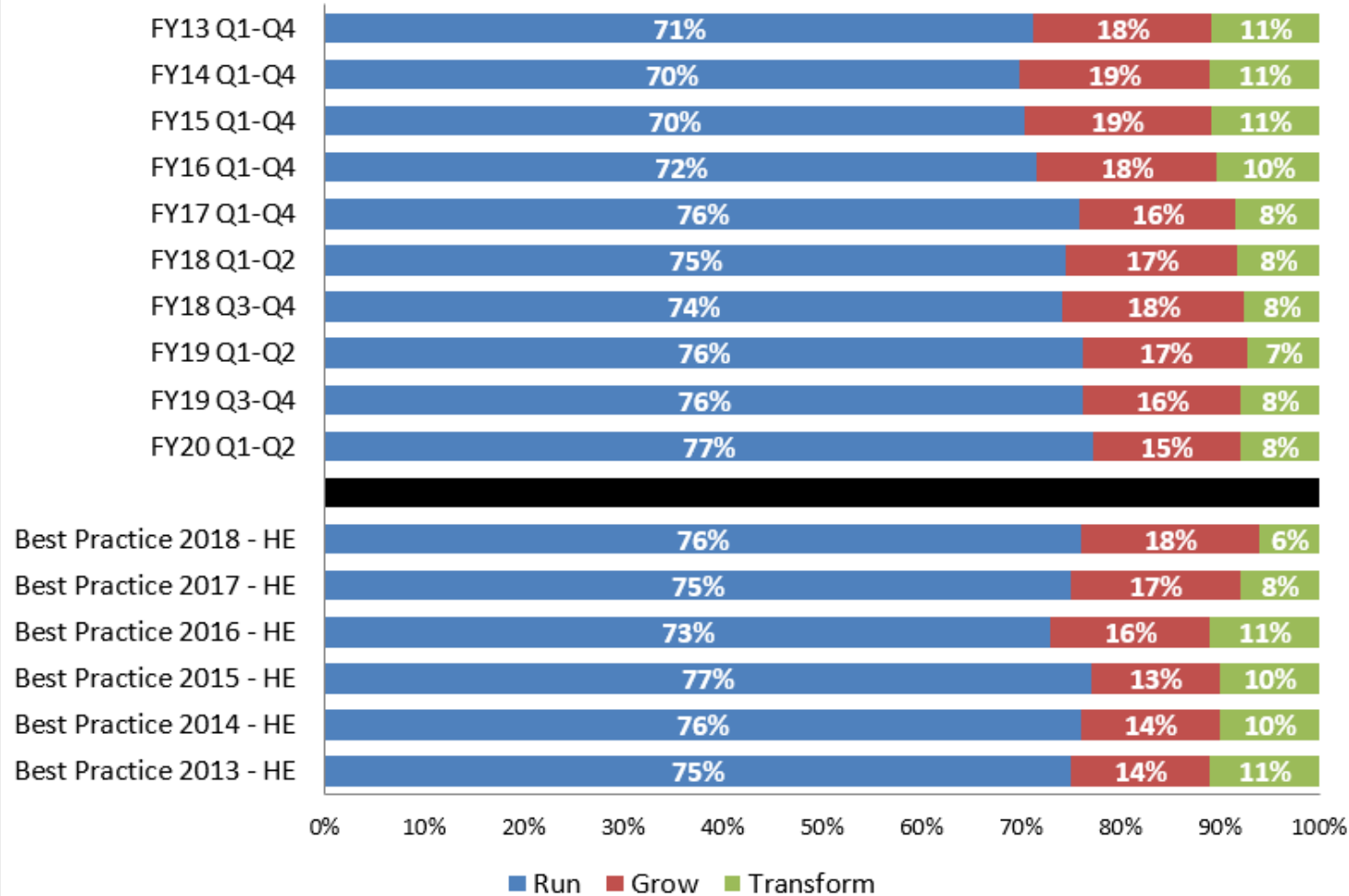


ITS Project Portfolio Resource Gap



ITS Project Portfolio Impact

Portfolio Strategic Breakdown - History



Run – Ongoing operations

Grow – Information systems and services to optimize performance

Transform – New technologies and processes that fundamentally promote change



FY20 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer	
	1-7	LOCUS Enhancements (7)	XLarge	Active	TBD	Enterprise/Multiple	
A	1	Rollout of WHAT-IF Report for Students, Faculty, and Advisors	Medium	Active	Q1 FY20	Academic Advising and Services	
A	2	GPEM Scholarship Interface - design, develop, test	Medium	Active	Q1 FY20	Enrollment Ops	
A	3	Financial Aid Award Letter Processes - Aid Year 2020	Medium	Active	Q1 FY20	Financial Assistance	
A	4	Rollout of Advising Notes Feature in LOCUS	Medium	Pending	Q1 FY20	Academic Advising and Services	
A	5	Advisor Assignment - re-design of batch process	Large	Pending	Q1 FY20	Academic Advising and Services	
A	6	FA 2020 Loans/ Disbursements Processes	Medium	Active	Q2 FY20	Financial Assistance	
A	7	Automated tool for LOCUS Prog/Plan changes	Small	Active	Q1 FY20	Registration & Records	
	8-14	Enterprise Content Management (7)	Large	Active	TBD	Enterprise/Multiple	
A	8	Treasury to Accounts Payable EFT Approval	Medium	Active	Q1 FY20	Accounts Payable	
A	9	ECM - Electronic Document Retention	Large	Hold	TBD	Information Technology Services	
A	10	Accounts Payable to Treasury/Cash Management - Foreign Invoices	Small	Hold	TBD	Accounts Payable	
A	11	HSC - Faculty Admin	Medium	Active	TBD	Faculty Administration	
A	12	DocFinity webforms with automated workflows that perform transactions in LOCUS	Large	Active	TBD	Registration & Records	
A	13	Docfinity intelligent capture product	Large	Active	TBD	Registration & Records	
A	14	Exception/Error Report for transcripts not entering workflow	Large	Active	TBD	Registration & Records	
	15-25	Business Intelligence/Data Warehouse Program (11)	Rank	XLarge	Active	TBD	Enterprise/Multiple
A	15	ILDS Submission of Student Data	1	Large	Active	Q1 FY20	Institutional Research
A	16	Revenue to Expense Model - Phase 3	2	Large	Active	Q2 FY20	Finance-Office of VP-CFO
A	17	BI for Student Finance	3	XLarge	Active	Q2 FY20	Finance-Office of VP-CFO
B	18	Develop an HR BI Dashboard, starting with key reports and metrics	4	Large	Active	Q3 FY20	Human Resources
A	19	Dashboard for Bursar Reports	5	Medium	Active	Q2 FY20	Office of The Bursar
A	20	Academic Requirements Report (ARR) Data into the EDW	6	XLarge	On Hold	Q3 FY20	Student Advising & Support
A	21	Student Profile - Power BI	7	Large	On Hold	TBD	Student Development - Office of VP
A	22	ITS Dashboard - Area Metrics	8	Medium	Active	Q2 FY20	Information Technology Services
B	23	ITS Annual Summary Dashboard	9	Medium	Active	Q2 FY20	Information Technology Services
A	24	Reports - BI Operational (1)	10	XLarge	Active	Q2 FY20	Information Technology Services
A	25	Reports - BI Projects (9)	11	XLarge	Active	Q2 FY20	Information Technology Services

FY20 Q1-Q2 ITS Pre-Approved/Established Projects

Priority	Row Nbr	Program Group	T-Shirt Sizing	Status	Est. Compl. (QTR)	Primary Customer
	26-37	Information Security Program (12)	Large	Active	TBD	Enterprise/Multiple
A	26	VPN Adjustments (remove 2-factor for email)	Small	Hold	Q2 FY20	Information Technology Services
A	27	Security - Securing How-To Instructions Across the University	Medium	Active	Q2 FY20	Information Technology Services
A	28	Security Training - High Risk Areas	Medium	Active	Q1 FY20	Information Technology Services
A	29	Security - Phishing Assessment	Small	Active	Q1 FY20	Information Technology Services
A	30	2015 Security Assessment	Medium	Active	Q2 FY20	Information Technology Services
A	31	2017 Security Assessment	Medium	Active	Q1 FY20	Information Technology Services
A	32	2018 Security Assessment	Medium	Active	Q2 FY20	Information Technology Services
A	33	2019 Security Assessment	Medium	Pending	TBD	Information Technology Services
A	34	High Security Lab Environment/Security Operations Center	Medium	Active	TBD	Information Technology Services
A	35	Broaden Use of SIEM Technologies	Large	Pending	Q2 FY20	Information Technology Services
A	36	2019 Cyber Security Awareness Month Events	Medium	Active	Q2 FY20	Information Technology Services
A	37	2016 Security Assessment	Medium	Active	Q2 FY20	Information Technology Services
	38-48	BCDR/Failover (10)	Large	Active	TBD	Enterprise/Multiple
A	38	Disaster Recovery Planning	Large	Active	Q4 FY19	Information Technology Services
A	39	Network Disaster Recovery / Redundant ATT Circuit	Medium	Active	Q1 FY20	Information Technology Services
A	40	Disaster Recovery - Slate	Medium	Active	Q1 FY20	Information Technology Services
A	41	Disaster Recovery - TouchNet Paypath/TPG	Small	Active	Q1 FY20	Information Technology Services
A	42	Disaster Recovery - Campus Safety Dispatch & Reporting (ARMS)	Medium	Active	Q2 FY20	Information Technology Services
A	43	Business Continuity for Departmental Staff	Large	Active	Q2 FY20	Information Technology Services
A	44	2019 Disaster Recovery Program Plan Reviews and Testing	Small	Active	Q2 FY20	Information Technology Services
A	45	Inter Campus Communication Disaster Recovery Plan & Testing	Medium	Active	Q1 FY20	Information Technology Services
A	46	Intra Campus Communication Disaster Recovery Plan & Testing	Medium	Active	Q1 FY20	Information Technology Services
A	47	Network Services (Core) Disaster Recovery Plan	Medium	Active	Q1 FY20	Information Technology Services
	49-53	Lawson/Kronos Enhancements (5)	XLarge	Active	TBD	Enterprise/Multiple
A	49	Lawson Self Service Outside the Firewall	Small	Pending	TBD	Financial Systems
A	50	ESS Direct Deposit	Small	Pending	TBD	Human Resources
A	51	ESS Life Events - Benefits	Small	Active	Q1 FY20	Human Resources
A	52	ESS Federal Tax Change	Large	Pending	TBD	Human Resources
A	53	Implement ADFS for Lawson	Medium	Active	Q1 FY20	Information Technology Services

Draft FY20 Q1-Q2 ITS Project Prioritization Worksheet

Draft

Priority	Row Nbr	Program Group	Recommended Ranking	Prior ITESC Ranking	PRB Ranking	ATC Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
		LDE Foundation: Collaboration and Security (5)					XLarge	Active	Q2 FY21	Information Technology Services
A	54	LDE Delivery Program	1	3	1	--	XLarge	Active	Q2 FY20	Information Technology Services
A	55	Exchange Online - Migration and Implementation					Medium	Active	Q1 FY20	Information Technology Services
A	56	2 Factor Authentication					Medium	Active	Q2 FY20	Information Technology Services
A	57	Deploy the password manager tool, LastPass					Large	Active	Q1 FY20	Information Technology Services
A	58	Azure Information Protection & Data Loss Prevention POC Project					XLarge	Active	Q2 FY20	Information Technology Services
A	59	Sakai 12 Upgrade					2	8	3	1 (tie)
A	60	Faculty Info System - Modifications for Collective Bargaining Agreement	3	9	9	---	Medium	Active	Q1 FY20	Faculty Administration
A	61	Course Evaluation Replacement	4	17	5	1 (tie)	XLarge	New	Q3 FY20	Institutional Research
A	62	Space and Asset Management - Phase 1 Implementation	5	4	2	---	XLarge	Active	Q4 FY21	Facilities-Office of VP
A	63	Course Schedule Builder for students integrated with LOCUS	6	--	7	---	XLarge	Active	Q1 FY20	Student Advising & Support
A	64	LOCUS Fluid Page Rollouts	7	5	4	---	XLarge	Active	Q2 FY20	Enterprise/Multiple
A	65	Secure Submission of W-9 Form for Accounts Payable Department	8	6	6	---	Small	Active	Q1 FY20	Controller
A	66	Implement Proto-Call for After Hours Mental Health Services	9	11	10	---	Small	Active	Q1 FY20	Wellness Center
A	67	Implementation of Preferred Names Functionality	10	--	13(tie)	---	Large	Active	Q2 FY20	Student Development - Office of VP
A	68	Judicial Affairs Systems Replacement (Maxient)	11	18	8	---	Medium	Active	Q1 FY20	Student Development - Office of VP
A	69	Learning Portfolio Program	12	--	11	2	Large	Active	Q2 FY20	Center for Experiential Learning
A	70	Replacement of ECSI SALNet	13	--	13(tie)	---	Large	Active	Q2 FY20	Office of The Bursar

FY20 Q1-Q2 ITS Project Prioritization Worksheet

Priority	Row Nbr	Program Group	Recommended Ranking	Prior ITESC Ranking	PRB Ranking	ATC Ranking	T-Shirt Sizing	Status	Est. Compl. (FY-QTR)	Primary Customer
A	71	Oracle Student Financial Planning Module Analysis	14	---	12	---	Large	Active	Q1 FY20	Financial Assistance
A	72	Provide Writing Placement infrastructure to support course placement	15	12	15	---	Medium	New	Q1 FY20	Student Advising & Support
A	73	Emergency Contact in RMS/Mercury using Person Flags	16	14	18	---	Small	Active	Q1 FY20	Residence Life
A	74	Board of Trustees SharePoint Portal	17	---	16	---	Large	Active	Q1 FY20	Office of The President
A	75	Rambler Link Software - Search and Implementation	18	19	17	---	Medium	Active	Q1 FY20	Career Development Center
A	76	JIT Faculty Training for Online Teaching	19	24	21	3	Medium	Active	Q1 FY20	Provost's Office / ITS
A	77	Follett Integration with Sakai	20	25	20	4	Medium	New	Q3 FY20	Provost's Office
A	78	Mac OS Computer Management Application	21	21	19	---	Large	Active	Q2 FY20	Information Technology Services
A	79	Enterprise Digital Assistant (Chatbot) - Research & Pilot	22	---	22	---	Large	Active	Q2 FY20	Information Technology Services
A	80	Travel & Expense Management Technology Implementation	23	---	23(tie)	---	Large	New	TBD	Controller
A	81	Modify Lawson Benefits Program to Address Plan Termination Date Issues	24	---	23(tie)	---	Medium	Active	Q2 FY20	Human Resources
A	82	Student Mentoring Software Pilot-PeopleGrove	25	---	25	---	Medium	Active	Q1 FY20	Quinlan School of Business
A	83	(OIP) application and database software RFP and implementation	26	---	26	---	Large	Active	Q2 FY20	Office Of International Prgs
A	84	CVENT Registration for the Climate Change Conference 2020	27	---	27	---	Medium	New	TBD	Institute of Environmental Sustainability

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

- Space & Asset Management System - Archibus
- Academic Technology Committee
- Information Security Advisory Council
- Architecture Review Board/Loyola Digital Experience
- ITS Project Portfolio Preparation

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