Agenda

ITS Project Portfolio Prioritization - Results
  • S. Malisch, J. Sibenaller

Advancement Upgrade
  • M. Halverson, J. Sibenaller

Student System Upgrade
  • C. Korinek, K. Smith

Phone System Upgrade
  • D. Vonder Heide

Document Management/ECM Upgrade
  • J. Sibenaller
## FY17 Q3-Q4 Prioritization Results

<table>
<thead>
<tr>
<th>Action</th>
<th>Project</th>
<th>T-Shirt Size</th>
<th>Status</th>
<th>Est. Compl. (Q3/Q4)</th>
<th>Primary Customer</th>
<th>Consensus Ranking</th>
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<tbody>
<tr>
<td>RANKED</td>
<td>LOCUS Enhancements (6)</td>
<td>X-Large</td>
<td>Active</td>
<td>TBD</td>
<td>Enterprise/Multiple</td>
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<td>Q2 FY18 HSDV Information Technology Services</td>
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<td>Q3 FY17 Enterprise/Multiple</td>
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### RANKED BY THE TESTS

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<tr>
<th>Student System Upgrade (7)</th>
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<th>Q2 FY18</th>
<th>Registration &amp; Records</th>
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<td>LOCUS upgrade (CS 9.2 &amp; PT 8.5S) - Phase I</td>
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<td>Registration &amp; Records</td>
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<tr>
<td>LOCUS Upgrade - CS PeopleTools 8.5S Upgrade</td>
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<td>Q2 FY18</td>
<td>Registration &amp; Records</td>
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<td>LOCUS Upgrade - In-Hub (Portal) PeopleTools 6.5S Upgrade</td>
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<td>Q2 FY18</td>
<td>Registration &amp; Records</td>
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<td>LOCUS Upgrade - Search Engine Upgrade - Elasticsearch</td>
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<td>Q2 FY18</td>
<td>Registration &amp; Records</td>
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<td>LOCUS Upgrade - CS 9.2 Database and Application Upgrade</td>
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<td>Q2 FY18</td>
<td>Registration &amp; Records</td>
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<td>LOCUS Upgrade - Decoupling Application and PeopleTools Software</td>
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<td>Registration &amp; Records</td>
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<td>LOCUS Upgrade - Evaluate Change Management and Testing Tools</td>
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<tr>
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<td>Online Performance Management System (2)</td>
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<td>TBD</td>
<td>Human Resources</td>
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<tr>
<td>Online Performance Management System - Phase 1</td>
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<tr>
<td>Online Performance Management System - Phase 2</td>
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<td>Human Resources</td>
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<td>Access Control &amp; Security - Maxxes (2)</td>
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<td>TBD</td>
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<td>Maxxes - Secondary Access Level Web Application</td>
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<td>Pending</td>
<td>TBD</td>
<td>Human Resources/Office of VP</td>
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<td>Maxxes - Security Log Interface</td>
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<td>Pending</td>
<td>TBD</td>
<td>Campus Safety UIC</td>
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<td>Online Exam Proctoring Solutions - Pilot</td>
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<td>Q1 FY18</td>
<td>Provost’s Office</td>
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<tr>
<td>Phone System Replacement - Phase 3</td>
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</tr>
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<td>LCSF Technology Needs for EMR, HIPAA, and PCI</td>
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<td>Q3 FY17</td>
<td>Loyola Community and Family Services</td>
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<td>Sakai 11 Upgrade</td>
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<tr>
<td>Hybrid On-line Nursing Program with Orbits</td>
<td>Small</td>
<td>Pending</td>
<td>TBD</td>
<td>Niehoff School of Nursing</td>
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<tr>
<td>Evaluation of Event Management Systems</td>
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<td>Active</td>
<td>Q4 FY17</td>
<td>Alumni Relations</td>
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<tr>
<td>Faculty Information System Suite Enhancements</td>
<td>Medium</td>
<td>Active</td>
<td>TBD</td>
<td>Provost’s Office</td>
</tr>
<tr>
<td>Secure Communications for ePHM</td>
<td>Large</td>
<td>Pending</td>
<td>TBD</td>
<td>Provost HSD</td>
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<tr>
<td>Evaluate Vendors to Host the Athletic Department’s Website</td>
<td>Small</td>
<td>Pending</td>
<td>TBD</td>
<td>Athletics</td>
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<tr>
<td>Compliance Tracking for Various Initiatives</td>
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<td>Pending</td>
<td>Q4 FY17</td>
<td>Enterprise/Multiple</td>
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<tr>
<td>ITS Help Desk to Service Desk</td>
<td>Large</td>
<td>Active</td>
<td>Q3 FY17</td>
<td>Information Services</td>
</tr>
</tbody>
</table>

*Established Initiative*
## ITS Major Initiatives Calendar

### (as of 12/9/16)

<table>
<thead>
<tr>
<th>Project/Program</th>
<th>Targeted Start Month (MM/YYYY)</th>
<th>Targeted Finish Month (MM/YYYY)</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Scholarship Management for Advancement</td>
<td>11/2015</td>
<td>04/2016</td>
<td>Complete</td>
</tr>
<tr>
<td>Biology Dept. Lab Research Postions - Application and Tracking</td>
<td>11/2015</td>
<td>07/2016</td>
<td>Complete</td>
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<tr>
<td>Relocate the Here For You Mobile Application for the Wellness Center</td>
<td>02/2016</td>
<td>07/2016</td>
<td>Complete</td>
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<tr>
<td>Campus Labs - Extracts and Related Components</td>
<td>02/2016</td>
<td>08/2016</td>
<td>Complete</td>
</tr>
<tr>
<td>Establish ZOOM Technology for Conferencing</td>
<td>06/2016</td>
<td>09/2016</td>
<td>Complete</td>
</tr>
<tr>
<td>Move Student Refunds from LOCUS to Lawson</td>
<td>04/2016</td>
<td>12/2016</td>
<td>Complete</td>
</tr>
<tr>
<td>Oracle 12C Database Upgrade (Required for PS Upgrade)</td>
<td>09/2016</td>
<td>03/2017</td>
<td>Active</td>
</tr>
<tr>
<td>ITS Help Desk to Service Desk</td>
<td>04/2016</td>
<td>03/2017</td>
<td>Active</td>
</tr>
<tr>
<td>Evaluation of Event Mgmt Systems</td>
<td>11/2016</td>
<td>04/2017</td>
<td>Active</td>
</tr>
<tr>
<td>Sakai 11 Upgrade</td>
<td>09/2016</td>
<td>05/2017</td>
<td>Active</td>
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<tr>
<td>LCFS Technology Needs for EMR, HIPAA, and PCI</td>
<td>03/2016</td>
<td>09/2017</td>
<td>Active</td>
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<tr>
<td>Phone System Replacement - Phase 3</td>
<td>08/2015</td>
<td>06/2017</td>
<td>Active</td>
</tr>
<tr>
<td>Compliance Tracking Technology</td>
<td>11/2016</td>
<td>06/2017</td>
<td>Pending</td>
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<tr>
<td>Online Exam Proctoring Solutions - Pilot</td>
<td>12/2015</td>
<td>12/2017</td>
<td>Active</td>
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<tr>
<td>LUHS/LUC/HSD Technology Program (3)</td>
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<td>12/2017</td>
<td>Active</td>
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<tr>
<td>Business Intelligence/Data Warehouse (3)</td>
<td>01/2014</td>
<td>12/2017</td>
<td>Active</td>
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<tr>
<td>PeopleTools/LOCUS Upgrade (7)</td>
<td>01/2017</td>
<td>12/2017</td>
<td>Pending</td>
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<td>ECM/Imaging Implementation (6)</td>
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<tr>
<td>Campus Construction Initiative (2)</td>
<td>05/2012</td>
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<tr>
<td>Online Performance Management System (2)</td>
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<tr>
<td>Information Security Program (8)</td>
<td>11/2014</td>
<td>TBD</td>
<td>Active</td>
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<tr>
<td>Faculty Information System Suite Enhancements</td>
<td>04/2015</td>
<td>TBD</td>
<td>Active</td>
</tr>
<tr>
<td>Lawson/Kronos Enhancements (8)</td>
<td>05/2015</td>
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<td>Active</td>
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<tr>
<td>LOCUS Enhancements (6)</td>
<td>02/2016</td>
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<td>Advancement Systems (4)</td>
<td>03/2016</td>
<td>TBD</td>
<td>Active</td>
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<tr>
<td>Business Continuity/Disaster Recovery (12)</td>
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<td>Access Control &amp; Security - Maxxes (2)</td>
<td>04/2014</td>
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<tr>
<td>Hybrid Online Nursing Program with Orbs</td>
<td>08/2016</td>
<td>TBD</td>
<td>Pending</td>
</tr>
<tr>
<td>Athletics Website Hosting Evaluation</td>
<td>12/2016</td>
<td>TBD</td>
<td>Pending</td>
</tr>
<tr>
<td>Secure Communications for ePHI</td>
<td>01/2017</td>
<td>TBD</td>
<td>Pending</td>
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</table>

**Legend:**
- Red text denotes a change
- Completion date is not firm and will most likely be extended
- Activity completed/in progress/planned
- Timing of the project is TBD
ITS Major Initiatives - FY17 Q3-Q4

**Academic and Faculty Support**
- LOCUS Enhancements (6)
- Access Control & Security - Maxxess (2)
- Faculty Information System Suite Enhancements
- Online Exam Proctoring Solutions – Pilot

**Administrative Initiatives**
- Online Performance Management System (2)
- Lawson/Kronos Enhancements (3)
- Advancement Systems (4)
- Evaluation of Event Mgmt Systems
- Oracle 12C Database Upgrade
- Secure Communications for ePHI
- LCFS Technology Needs

**Infrastructure**
- Campus Construction Initiatives (2)
- Information Security Program (8)
- LUHS/LUC/HSD Technology Program (3)
- IT Disaster Recovery (12)
- Phone System Replacement

**Student Technology Support**
- PeopleTools/LOCUS Upgrade (7)
- Hybrid On-line Nursing Program with Orbis
- Sakai 11 Upgrade

**Continuous Service Development**
- Business Intelligence/Data Warehouse (3)
- Enterprise Content Management (6)
- ITS Help Desk to Service Desk
- Compliance Tracking Technology
- Athletics Website Hosting Evaluation
Agenda

ITS Project Portfolio Prioritization - Results
  • S. Malisch, J. Sibenaller

Advancement Upgrade
  • M. Halverson, J. Sibenaller

Student System Upgrade
  • C. Korinek, K. Smith

Phone System Upgrade
  • D. Vonder Heide

Document Management/ECM Upgrade
  • J. Sibenaller
Advancement Systems Upgrade

• What we are upgrading:
  • Ellucian 9.8.1.1 to Ellucian 2015 (4 releases behind)

• Why we’re upgrading:
  • Increased functionality for Advancement team
    o Streamlined gift entry process
    o Membership enhancements – additional address features & social media links
    o Home Page customization based on Loyola’s needs
    o Additional Navigation features to quickly access key features (side & top)
  • Opportunities for standardization
    • Provides formalization of final push from Client to Web-based version
    • Ensures the team – including new team members – have a uniform understanding of the tool
    • Advancement Services provides training/support to just one version (i.e. not Client AND Web)
  • Server Upgrade provides increased processing speed
  • Further separation of infrastructure in support of LUHS
  • Become “current” with Ellucian Support
Advance 2015 Upgrade Timeline

Project Initiation
May-Oct ‘16
- Project Kickoff
- Research & Discovery
  - LUHS/LUC Business Process Touch Point Document
- POC
- Report Gap Analysis
- LUC/LUHS Decision

Plan & Dev
Nov ‘16-Feb ‘17
- Environment Build-Out
- Active Directory Integration
- Security Requirements & Set-up (Apps, Forms)
- Database Object Archive
- Data Quality
- Train & Test Requirements

Train, Test
Feb-May ‘17
- Training
- User Acceptance Testing (Business Users)
- Technical Testing (ITS Team)
- Server upgrade
- Redundancy for LUHS Separation for LUC upgrade
- Build Out Prod

Go Live
May-June ‘17
- Communication (LUC & LUHS)
- Go Live - PROD (May 2017)
- Go Live - PRE (June 2017)
- Support & Knowledge Sharing
- Project Hand off to Business
- Lessons Learned
- Project Close out
Agenda

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LOCUS

LOYOLA's ONLINE CONNECTION to UNIVERSITY SERVICES

• Student access to Demographics, Registration, Financial Aid, Billing, Grades, Advising, Apply for Graduation, etc.

• Faculty access to Class rosters, Grade rosters, Student photos, Advising and Administrative functions, etc.

• Staff access to Admissions, Student Groups, Curriculum Management, Class Scheduling, Award degrees, Issue Transcripts, etc.

• Alumni /Parent Guest access for appropriate functions.
- LOCUS provides data/interfaces with over 40 applications
- Source of truth for Student and Enrollment data
Why are we doing this?

• Campus Solutions customers are required to stay current with Campus Solutions (CS) and People Tools (PT) software versions in order to receive support from Oracle.

• Extended support for CS 9.0 will end December, 2019.

• Upgrading to Campus Solutions 9.2 and PeopleTools 8.55 will enable implementation of additional functional and technology features, some of which could replace existing customizations.
LOCUS - Campus Solutions 9.2 Upgrade

How are we doing this?

- Researched possibilities from other schools and consultants on how to execute the upgrade
- Recommendations were to split the upgrade into two phases which will overlap
- Identified two pre-requisite projects (Crystal retirement, Student refund change)
- Phase 1 - Technical focus is on the upgrade of the database, application software and hardware, PeopleTools
- Phase 2 - Functional focus is on process changes from Bundle reviews to selective adoption of new features via PUM images. Creation of training and documentation required for usage and feature adoption.
LOCUS Upgrade Phase 1 - Technical

• This Upgrade will include:
  o Oracle PeopleSoft Campus Solutions (CS) 9.2 and PeopleTools 8.55 software
  o Oracle PeopleSoft Portal (aka Interaction Hub or I-Hub) to PeopleTools 8.55 software
  o Addition of 5 new servers (PUM (1 phy), Elasticsearch (2 phy), Software de-coupling (2 vm)

• Responsive Design - Will keep Loyola current with the vendor technology roadmap, as Oracle adapts Campus Solutions to the multiple user device type environment with maximum functionality and usability in a secure in-house infrastructure. This is the new user interface capability (Fluid) which will be introduced and expanded with Oracle updates.

• Selective Adoption - This upgrade also changes the software delivery mechanism by Oracle to PeopleSoft Update Manager (PUM) which will allow selective adoption and clearer dependency constraints.
LOCUS Upgrade Phase 2 - Functional

• Functional enhancements will be realized gradually after the completion of Phase 1 - as released by Oracle for CS and as tools become more familiar to LUC technical and functional users. Phase II will plan for specific functional projects to take advantage of new capabilities.

• This phase will include Student, Faculty and Staff end user training and documentation to support wide spread use of new features and functionalities.

• Review of customizations to adapt or replace with new functionality.
LOCUS - Campus Solutions 9.2 Upgrade

Phase 1 Projects

PSS 2492 – Student System Upgrade Parent project
  PSS 2514 – CS PeopleTools 8.55 Upgrade
  PSS 2516 – Portal (iHUB) PeopleTools 8.55 Upgrade
  PSS 2517 – Search Engine Upgrade (Elasticsearch)
  PSS 2518 – CS 9.2 Database and Application Upgrade
  PSS 2519 – Decoupling Application and PTs Software
  PSS 2520 – Change Management and Testing Tool

Phase 2 Projects - TBD
Current LOCUS Server Architecture

Test/Development

- **Web Server** Portal & CS
  - Application Server Portal & CS
    - CS & PA Proc Schdlr
    - PA Pub/Sub & Gryw*
    - CS Pub/Sub & Gryw**
- PRE, TRN, UPG Databases
- DMO, DEV, TST, SBX Databases
- Process Scheduler Development

Production

- **Web Server** Portal & CS
- Application Server Portal & CS
  - CS & PA Proc Schdlr
  - PA Pub/Sub & Gryw*
  - CS Pub/Sub & Gryw**
- Application Server Portal & CS
  - CS & PA Proc Schdlr
  - PA Pub/Sub & Gryw*
  - CS Pub/Sub & Gryw**
- Application Server Portal & CS
  - CS & PA Proc Schdlr
  - PA Pub/Sub & Gryw*
  - CS Pub/Sub & Gryw**
- Application Server Portal & CS
  - CS & PA Proc Schdlr
  - PA Pub/Sub & Gryw*
  - CS Pub/Sub & Gryw**

Database Servers

- PRD Failover Database
- PRD Database

**F5 Load Balancer**
 locus.luc.edu and lucs9.luc.edu
Upgraded LOCUS Server Architecture

F5 Load Balancer
locus.luc.edu and lucs9.luc.edu

De-coupling Server

Web Server
Portal & CS

Web Server
Portal & CS

Web Server
Portal & CS

Web Server
Portal & CS

Web Server
Portal & CS

Web Server
Portal & CS

Web Server
Portal & CS

Web Server
Portal & CS

Application Server
Portal & CS

Application Server
Portal & CS

Application Server
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Application Server
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Application Server
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Application Server
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Application Server
Portal & CS

Application Server
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Application Server
Portal & CS

Application Server
Portal & CS

Application Server
Portal & CS

Application Server
Portal & CS

PRD Failover Database

PRD Database

PRD Elasticsearch Server

DMO, DEV, TST, SBX Databases

PRE, TRN, UPG Databases

Failover Elasticsearch Server

De-coupling Server
Proposed Project Schedule – Phase 1 (Technical)

Upgrade Project Pre-requisites
July ‘16 – Jan ‘17
- Research on what and how to upgrade
- Crystal Report Retire
- Student refund change
- Create initial PSS projects

Install New Release
Feb ‘17 – May ‘17
- New Release CS 9.2 and PTs 8.55.xx
- Portal (iHub) PT 8.55.xx
- Evaluate Change Management and Testing tool
- Elasticsearch in TST environment

Test Move to Production
May ‘17 – Dec ‘17
- Phase 2 starts
- Prepare training and documentation
- Functional training
- Multiple Iterations of Move to Production (MTP)

Final Move to Production
January 2018
- Final MTP
- Go Live
- Phase 2 continues
Proposed Project Schedule – Phase 1 (Technical)

- **Multiple iterations**
- **Functional training**
- **Ongoing activity**
- **Quarterly maintenance**
## Budget Summary

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
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</thead>
<tbody>
<tr>
<td>Hardware Cost</td>
<td>$83,500</td>
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<tr>
<td>Software Cost</td>
<td>$40,000</td>
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<tr>
<td>Technical Professional Services</td>
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<tr>
<td>Functional Professional Services</td>
<td>$20,000</td>
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<tr>
<td><strong>Total Budget</strong></td>
<td><strong>$156,000</strong></td>
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  • D. Vonder Heide

Document Management/ECM Upgrade
  • J. Sibenaller
Phone System Upgrade

Reasons for the Upgrade

• 31 year old system
• Unsupported hardware
• 3 major releases behind
• Power supply to system in jeopardy
Phone System Upgrade

Decision to stay TDM using Authentic Avaya.

• Benefits v. Cost
• Leverage existing sets and some hardware
• Avoid costly upgrade to data infrastructure
• Avoid re-training users
• Still required to support analog devices
Phone System Upgrade

Project Team

Loyola:
  • Florence Yun – Project Manager
  • Dave Gabrovich
  • Dave Wieczorek
  • Adina Tenenbaum

Altura:
Carol Copper – Project Manager
Jim Monk
Curt Meehan
Heron Leal
Paul Vice
Adrian Gallegos
Rob Roll
Phone System Upgrade

Current Status
• Contracts
• Equipment Delivered
• Project Meetings
• Site-Walk Through

Next Steps
• Complete network surveys
• Begin hardware installation at LSC
• Migrate LSC
• Begin hardware installation at WTC
• Migrate WTC
Phone System Upgrade Timeline

**Project Initiation**
Jan-May ‘16
- Solution Analysis
- Presentation to ARB
- Initial Presentation to ITESC (Mar 29th)
- Updated Presentation to ITESC & Approval (May 18th)

**Plan & Dev**
Jun ‘16-Jan ‘17
- Implementation Planning
- Equipment & Environmental Design

**LSC Go Live**
Jan-Feb ‘17
- Contract Executed (Jan 12th)
- Equipment Delivery (LSC & WTC)
- Site Walkthrough
- Hardware Installation & Configuration
- Technical Testing (ITS Team)
- Communication
- Migrate LSC (Feb 25th)

**WTC Go Live**
Mar-Apr ’17
- Hardware Installation & Configuration
- Technical Testing (ITS Team)
- Communication
- Migrate WTC (April 22nd)
- Support & Knowledge Sharing
- Lessons Learned
- Project Close out
Phone System Upgrade

Purchases

• All hardware purchased and received.
• All software and licenses purchased and received.
• Acquired HSD licenses (200 Analog, 800 digital) for future use.
• Maintenance - 3year prepay from LUC finance payback scheduled over FY17 - FY20.
Phone System Upgrade

Requested Enhancements

- Enterprise IVR system (Switchboard, Law School)
- Enterprise Recording services (Security, Helpdesk, Bursars)
- BCMS replacement ACD MGMT (Helpdesk, Bursars)
- Automated dialing system (Bursars, Alumni Relations)
- Call Accounting system – (Department Chargeback)
Avaya Files for Chapter 11 Bankruptcy Protection

The communications company also suspended plans to sell its call center business

By IMANI MOISE and MATT JARZEMSKY
Updated Jan. 19, 2017 5:19 p.m. ET

Communications company Avaya Inc. filed for chapter 11 bankruptcy protection Thursday as the company extended its decadelong string of annual losses.

Avaya, which installs and operates corporate phone systems, said it is seeking to restructure its balance sheet to put it in better position for the future. The Santa Clara, Calif.-based company last suspended plans to sell its call center business in May.
Agenda

ITS Project Portfolio Prioritization - Results
• S. Malisch, J. Sibenaller

Advancement Upgrade
• M. Halverson, J. Sibenaller

Student System Upgrade
• C. Korinek, K. Smith

Phone System Upgrade
• D. Vonder Heide

Document Management/ECM Upgrade
• J. Sibenaller
Document Management System Upgrade

• What we are upgrading:
  • DocFinity 10.13.3 to DocFinity 11.00.x

• Why we’re upgrading:
  • Increased stability for DocFinity users
    o HTML5 replaces the need for outdated Flash (browsers are phasing out Flash)
    o Over 100 customer bugs fixed in new release
    o Improved Security
    o Feature enhancements:
      o improved user interface including one-click full screen panels
      o pop-out viewer
      o ad-hoc workflows
      o mobile eForms
      o revamped document editing & hot keys
  • Take advantage of HTML5 flexibility & feature set (forms building)
  • Become “current” with DocFinity Support
DocFinity Version 11 Upgrade Timeline

**Project Initiation**
April – May ‘17
- Project Kickoff
- Research & Discovery
- Upgrade Test Environment
- ITS testing

**Plan & Dev**
June – July ‘17
- Q/A Environment Build-Out
- ITS Testing
- Core Business User testing

**Train, Test**
Aug-OCT ‘17
- Training
- User Acceptance Testing (Business Users)
- Technical Testing (ITS Team)
- Production Environment Build Out

**Go Live**
Nov ’17
- Communication
- Go Live - PROD (Nov 2017)
- Project Hand off to Business
- Lessons Learned
- Project Close out
2017 ITESC Schedule

January 26, 2017 - Thursday, 1:30-3:30 PM
- Project Portfolio Prioritization Results
- Status Updates – Major Upgrades
  - Student System, Phone System, Advance, Document Mgmt

March 30, 2017 - Thursday, 1:30-3:30 PM

June 15, 2017 - Thursday, 1:30-3:30 PM
- Project Portfolio Prioritization

August 31, 2017 – Thursday 1:30-3:30 PM

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

December 12, 2017 - Tuesday, 1:30-3:30 PM
- Project Portfolio Prioritization