

UNIVERSITY OF ILLINOIS SYSTEM
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

AITS

Administrative Information
Technology Services

FY17
STRATEGIC
PLAN
PROGRESS
REPORT



Save Time • Improve Ease of Use • Improve Speed to Service
Deliver Targeted and Pervasive Information • Collaborate

AITs STRATEGIC PLAN Progress Report

As of July 26, 2017

This document reflects progress towards AITs's current strategic goals and initiatives. It is intended to provide a periodic assessment of our progress in order to highlight our successes, identify areas where attention may be due, and provide a facilitator for discussion regarding resource allocation and evolving priorities. Progress is reported on a semi-annual basis on January 1 and July 1. The January report is a less formal working document and may reflect more informal initiative status comments. The report as of July 1 is a component of the AITs Annual Progress Report.

AITs Strategic Plan available at: http://www.ait.s.uillinois.edu/reference_library/a_i_t_s_strategic_plan/








Contents

Contents	1
BUSINESS PROCESS SUPPORT, ORGANIZATIONAL EFFECTIVENESS, FINANCIAL STEWARDSHIP AREAS & GOALS	4
1 Business Process Support	4
2 Organizational Effectiveness	10
3 Financial Stewardship	12
COLLABORATION/COMMUNICATION SERVICES & IT GOVERNANCE AREAS & GOALS	14
4 Collaboration and Communication Services	14
5 IT Governance	15
INFORMATION SECURITY AND PRIVACY & INFRASTRUCTURE AREAS & GOALS	17
6 Information Security and Privacy	17
7 Infrastructure	21
INSTITUTIONAL DATA AND INFORMATION AREAS & GOALS	23
8 Institutional Data and Information	23

Background

The AITS strategic directions are statements indicating the specific strategic areas that AITS will focus on in supporting the University’s mission and our responsibilities as an organization. These strategic directions align with our mission and vision and focus our efforts to fulfilling these. In pursuing these strategic directions, the strategic goals and initiatives serve as actionable broad and specific plans that AITS will pursue in order to fulfill our stated strategic directions. The AITS strategic goals were created through discussions with our customers, and are refined by internal conversation within AITS. We utilize our strategic directions as described earlier, to guide development of goals that support and align with these directions. Most organizations need to successfully accomplish many goals to achieve their mission. Some of the goals presented have not yet been prioritized or resourced and represent stretch goals that will be pursued as resources are available and other goals are satisfied. Each goal and initiative has a different priority, and the priority changes throughout the year depending on environmental factors such as funding, urgency, University needs, vendor partnerships and human resource availability. The strategic goals are pursued through our initiatives. Initiatives are operational in nature and achievable within an expected timeframe and available resources. There may be multiple initiatives for a strategic goal.

A summary overview is available below, followed by detailed information by individual initiative.

Progress	 Critical	 Off Target	 Waiting on Someone	 Not Started	 Deferred	 On Target	 Achieved
Goal		1			1	36	2
Team 1		5			1	13	13
Team 2		2			5	9	2
Team 3						20	
Team 4						20	
Team 5		3			5	23	1
Team 6		5			2	12	4

MISSION STATEMENT

We provide a wide range of administrative information technology solutions and services to the University community that are accessible, reliable, accurate, efficient, and responsive to customer needs. We collaborate to proactively identify opportunities, manage risks, plan future initiatives, and solve problems by leveraging all of our information technology resources and knowledge. We continually measure and evaluate our services in order to optimize them for the University community.

VISION STATEMENT

To be an engaged partner within our University community to advance the institution's mission and administrative functions. We will provide information technologies and services that will balance the need to be innovative, collaborative, and easy to use while also being reliable, predictable, and relevant to the University community who utilize them.

CORE VALUES

Leadership

Using the resources available to us as individuals and as a department, we create ways for everyone to contribute to our objectives of anticipating customer needs, providing innovative, cost-effective and sustainable solutions, and delivering reliable systems and infrastructure. Leading by example, we will continually look for ways to enhance data driven decision-making, challenging old standards and common practices.

People

People are the University's most important asset. We will create and sustain a safe environment for them. We will invest in our staff members at all levels in our organization through a wide variety of development activities and opportunities. We encourage staff members to be proactive in career development and planning and furthering their formal education.

Stewardship

We consider both the long-term well-being of the University and the short-term imperatives facing it in the decisions we make, the actions we take, and the advice we offer to other leaders across the University. We encourage and support our staff members as they work towards the right solutions for the University.

Integrity

We are forthcoming, truthful, ethical, and sincere in our words and actions. We keep our promises. We build and maintain trust between colleagues across the department and are invested in each other's success.

Customer Satisfaction

We strive to provide the highest level of service possible to our customers based on their needs and our capabilities. We work within our means to develop the best solutions for our customers.

Learning

We continually learn from working with our customers, fellow employees, partners at the campuses and University Administration, and our peers in industry and higher education. We value our customers' insight, experience, and expertise.

STRATEGIC DIRECTIONS

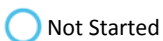
Save Time: Improve and add services that increase productivity for faculty, students, and staff.

Improve Ease of Use: Improve the usability of AITS services.

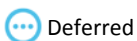
Improve Speed to Service: Improve the time to delivery of AITS services.

Deliver Targeted and Pervasive Information: Provide for strategic, widespread use of our data.

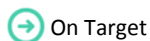
Collaborate: Build and strengthen relationships throughout the University based on mutual trust.



Not Started



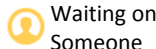
Deferred



On Target



Off Target



Waiting on
Someone



Critical



Achieved

AITs STRATEGIC PLAN PROGRESS REPORT

BUSINESS PROCESS SUPPORT, ORGANIZATIONAL EFFECTIVENESS, FINANCIAL STEWARDSHIP AREAS & GOALS

1 Business Process Support

1.1 Promote and support collaboration and community source initiatives to leverage tools we've already built and provide a healthy environment where systems and people can more easily work together and communicate. (Team 2) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.1.1 Reduce application redundancy and leverage the development work of others across the enterprise. Applications developed by edge units can be leveraged by other departments and colleges across the campus and university instead of being repeatedly redeveloped or purchased. A basic model has been completed and now needs to be published. AITS could provide the infrastructure and offer services and cost recovery where a need exists. (Team 2)</p> <p><i>There is a documented shared development process that outlines the roles and responsibilities of each party. We are establishing service level agreements where appropriate for FormBuilder. The challenge is to identify candidate systems developed by units that can be repackaged to be used by a large number of units. No applications have been identified as candidates for extension from an edge unit to the enterprise subsequent to what already exists for FormBuilder.</i></p>	07/01/15, 06/30/18	80% Published model and processes for converting and operating a system developed by a college or department to be centrally operated and supported by a federation of users (using Form builder as a model).	80%	As of 06/21/17
<p>1.1.2 Create and deploy a service to provide a web services registry as well as a common repository for applications, enterprise message objects, and community source development initiatives with an improved governance structure and marketing. (Team 2)</p> <p><i>The web site, as a content delivery system, is completed and is being utilized by our integration partners. API definitions are actively being added, in parallel with efforts to provide enhanced view/filter/search capability around the integration data model detail.</i></p>	07/01/15, 06/30/18	75% Enterprise API Management website is in place and is being used. Identify and implement tools that will help maintenance of this information more manageable.	80%	As of 06/26/17
<p>1.1.3 Develop, enhance, and improve our data integration services including community data definition and integration standards and how they are implemented. (Team 2)</p> <p><i>AITS has established integration strategies and methods that incorporate the latest industry standard technologies for providing enhanced web service capabilities. AITS has proven success with implementing and adapting our service offerings to the disparate data needs and client platforms presented by our integration partners. The achievements realized within the purview of this initiative have AITS well staged to support the growing demand for integrations across the University of Illinois System. Accomplishments include the following: Introduction of the AITS RESTful Data API, Implementation of Kafka as a streaming platform, and Security Enhancements.</i></p>	07/01/15, 06/30/18	80% Continue to provide valuable integration services	80%	As of 07/19/17

1.2 Systems and services that support university business processes will be designed with easier contemporary standards for ease of use to improve user experience and minimize the training burden on the university. (Team 2) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
1.2.1 Create a User Experience and Design (UXD) area at AITS with dedicated resources that will assist AITS staff as well as other university departments with implementing user experience design standards.	07/01/15, 06/30/18	75% Standards will be	75%	

This group would be responsible for but not limited to documenting design standards and guidelines, prototyping, developing style guides, and providing a consistent look and feel for university applications. (Team 2)

documented and available for others to access. Templates will be available to assist others in providing a consistent look and feel.

As of 07/06/17

Resources are currently working on a consistent look and feel for enterprise applications such as UI Verify, NESSIE, IAM, New Hire, RNJA, and PI Portal. Resources are also involved in helping other areas (University Relations, OBFS, and Disability Services at all three Universities) to improve the user experience for their applications and websites (My Financials, uillinois.edu website, My Access Center application). Web Standards are being developed, which will give a common baseline for application and websites. A front-end platform and templates will be part of the web standards. Recently developed applications and websites are being documented. UXD-related updates have been added to the AITS SDLC. This will help to define roles, responsibilities and process flow.

1.2.2 Staff increased maintenance and support load arising from the implementation of new user requested applications and services, e.g. HR Front-end, iBuy, PARIS, Nenet, Upside, Common Application (UIC), and TEM. Provide resources to counter decreased headcount available for user requested new software applications and services. One-time funds received in FY14 only partially addressed the increased load. (Team 2)

07/01/15,
06/30/18

100%
Increased staff to offset the loss of staff dedicated to support for new systems.

75%



As of 07/24/17

We are continuing with the one-time funds as well as additional funds for the President's website. Given the budget situation, recurring funds are highly unlikely. In lieu of that, we plan on justifying temporary, project-specific funds or funds from income producing activities.

1.3 Eliminate unnecessarily redundant systems. (Team 1) (06/30/18)

35%



Comments on Status: The ARP process has been revised and is being implemented along with a review of security and cloud attributes.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.3.1 Continue and improve the Application Review Process that inventories IT systems to identify areas for further analysis related to system or service collaboration or redundancy. Perform analyses and prepare recommendations for reducing redundant systems. (Team 1)</p> <p><i>Application Review Process has been updated and handed to a project manager for implementation along with some security and cloud analysis attributes.</i></p>	07/01/15, 06/30/18	100% Complete review for FY16 with recommendations for decommissioning services.	35%	 As of 06/20/17
<p>1.3.2 Create an action plan to reduce or consolidate redundant systems and services. (Team 1)</p> <p><i>This work is not yet complete and will follow the recommendations from 1.3.1.</i></p>	07/01/16, 06/30/18	50% Plan complete. Decommissioning complete.	0%	 As of 02/24/17

1.4 Increase customer satisfaction through better metrics and communication of services. (Team 3) (06/30/18)

Comments on Status: Efforts are underway to get feedback from customers using surveys to gain information on customer satisfaction. We are using Social Media and Newsletters to communicate services. We have started to have service check meetings with service desk and our clients. We have started work on an Operations Score Card that measures our metrics to industry standards. Customer satisfaction surveys have been implemented and we are tracking the net promoter scores. Which allows us to compare across the other industries.



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.4.1 Identify requirements and KPI's to measure satisfaction of support and services. (Team 3)</p> <p><i>The initial dashboard for Service Desk has been completed and a public version of the dashboard is being developed. Focus groups were held to gauge client satisfaction and surveys have been developed and are starting to be sent to Service Desk customers. We are also continuing to produce regular reports on our Knowledgebase, implemented customer surveys, and producing service desk reports that get sent to our management group. We started collecting feedback from applications using surveys and PEAR has been the first application we have gotten feedback on. This work is complete.</i></p>	07/01/15, 06/30/18	80% 100% Surveys complete and focus groups formed.	100%	 As of 07/24/17


1.4.2 Create a committee or empower a customer-facing unit to define feedback loops and conduct focus groups, surveys, and customer interviews. (Team 3)

We have been collecting surveys on service desk performance and the response has been positive. Focus groups have also been held for Service Desk and SharePoint service. Service Desk customers automatically receive a survey at the resolve of their issue to ensure good customer service. Other applications have started to get these same satisfactions surveys with PEAR being the first. We have also held interviews for undergraduate students to collect the experience of using BANNER for registration. This work is complete.

07/01/15,
06/30/18

70%
100% Surveys complete and focus groups formed.

100%

As of 07/06/17 


1.4.3 Accurately reflect our services and allow for clear and concise communication of our services to customers. (Team 3)

We are using Social Media and the AITS Newsletter to update people on new services or updates on current services. We are also communicating services with active presentations at venues such as Caffeine Breaks and IT Pro Forum. In addition, updates to AITS Service Catalog have been made. We are continuing to design the updates for the AITS website and are planning to move the apps page to the uillinois.edu site for more visibility to customers.

07/01/15,
06/30/18

30%
100% Updates to AITS website to clearly reflect services. Present services at venues where customers would attend.

30%

As of 07/06/17 


1.4.4 Establish new delivery channels such as Bomgar, instant messaging methods, etc. to provide an additional method of support. (Team 3)


Bomgar is also being used by service desk and desktop support to allow for instant support. Bomgar reduces the need to wait for someone to come in person to help with workstation issues. A full-time back office desktop support person has been put in place that provides nearly instant support to clients with desktop issues. The Service Desk can take calls and hand-off the customer to the support person that can provide first level support and many times eliminate the need for a client services person to go onsite. New departments are using Bomgar for endpoint support of their clients. We have also installed chat on the security application for people to instantly ask questions and the Knowledge Base provides self service support to frequently asked questions.



07/01/15,
06/30/18

60%
100% Use Bomgar in service desk, install instant messaging or chat on services that would benefit from instant communication.

60%

As of 07/24/17 

1.5 Improve/implement tools and services that facilitate improved efficiency and effectiveness of departments across the University. (Team 2) (06/30/18) 

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.5.1 Evaluate and redeploy, augment, or replace the Xtender document management system with a new tool, which can address the needs for more advanced functionality across the full life cycle of a business process such as allowing better sharing of information and reduction of duplicate storage. Xtender is lacking in many critical functions above its original purpose for the “capture and conversion” of paper documents into electronic copies for processing. (Team 2)</p> <p><i>We are currently in the process of evaluating the Xtender 8.1 and BDMS 8.6/9 releases, which should provide much of the needed functionality that was identified during the analysis project. Once these releases are evaluated, then we will reassess and determine what needs are missing, and conduct an ITPC project for the outstanding functionality that is desired. The Xtender 8.1 release will go into production in the fall of 2018. We are also currently evaluating enterprise workflow solutions, some of which include document management functionality. This evaluation process is in the beginning stages of an RFP.</i></p>	07/01/15, 06/30/18	85% Tool which supports full life cycle of business processes, and meets the current industry standards of functionality (i.e. index and search, workflow, OCR, etc.)	75%	As of 06/29/17 
<p>1.5.2 Create a Document Management Service Center at AITS with dedicated resources to assist units with their document management needs. This may provide additional automation opportunities as well (Workflow, Formbuilder, etc.). (Team 2)</p> <p><i>No progress has been made to date. Lack of funding has not allowed this initiative to proceed. No change in status as of 2/28/16.</i></p>	07/01/15, 06/30/18	50% A DM Service Center which allows for reduced duplicity of information and systems across the enterprise, allowing units to focus on student and faculty needs, rather than administrative needs, such as storage and retrieval of information.		As of 06/28/17 

1.5.3 Investigate options to support enterprise document management tools in support of office business processes that will allow better sharing of information and reduction of duplicate storage. (Team 2)


Will track progress as part of 1.5.1. Options have been reviewed and recommendations are being made as part of 1.5.1.

07/01/15,
12/31/16

100%
Analysis complete.
Pilots complete.
Recommendations prepared for review.

100%

As of 06/28/17



1.5.4 Create a SitePublish Web Content Management System Service at AITS with dedicated resources that will offer assistance and consulting services for web site hosting and related web services for UA and other campus units. (Team 2)


We currently provide a SitePublish WCMS service, however, we only have approximately 1 FTE dedicated (from ADSD and COE combined.) As more sites are added, additional FTE will be needed to support those sites. The WCMS Service has currently created 54 SitePublish websites. (3 new sites added since the last update.)

07/01/15,
06/30/18

100%
A service in place with the capability to support existing sites and to add 1 - 2 more per month.

100%

As of 06/28/17



1.5.5 Perform an analysis of AITS internal processes with a goal of proposing and implementing improvements. Analysis should focus on areas such as: Internal communication; Duplication of effort; Different priorities; Different processes; Educating on what we do and collaborate on common practices and processes; Recognizing areas of overlap; Improve workflows and business process analysis. (Team 1)


AITs worked on documenting a number of AFM processes over the past year which has resulted in improvements in a number of areas. We are now planning a BPI engagement for Inventory Processing in FY18.

07/01/15,
06/30/18

1
Completion of PI projects within AITS. Successful implementation of recs.

1

As of 06/20/17



1.5.6 Implement a set of Research Management and Administration systems and integrations to eliminate redundant systems, share data, and provide an easy to use portal for principal investigators (PI Portal). These systems will focus to increase administrative productivity, reduce faculty workload and provide data for better analytics and additional positive exposure for research outcomes. (Team 2)


Kuali Research was implemented to support pre-award back office processes. Concurrently the PI Portal was updated. The RNUA system was updated for the 2016 reporting cycle and the sponsor specific COI module was implemented. The decision has been made by the campuses to continue using their locally developed IRB and IACUC systems. The Proposal Submission and Routing module of Kuali Research is expected to be implemented in late 2017, with beta testing and piloting planned for fall 2017. Work is being done for the Enhanced Awards Detail page in myPortal. Kuali software is being upgraded to 1703 in July 2017.

07/01/15,
06/30/18

75%
Fully implemented Kuali Research pre-award system, compliance systems (either internally developed or vended), and a PI Portal that centralizes the information a PI needs to manage projects.

75%

As of 06/28/17



1.6 Begin feasibility study for the replacement of the Banner ERP system. (Team 2) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.6.1 Examine differences of ERP implementation processes between classic 'late 1990s/2000s' system versus current and future cloud systems. (Team 2)</p> <p><i>University Business Process Review Proposal is in draft and under review by various governance groups for comment and support. No further progress or funding at this time, so this initiative is being moved to deferred status.</i></p>	07/01/15, 06/30/18	75% Strategy in place for the best ERP approach for future enterprise business processes.	65%	As of 06/29/17
<p>1.6.2 Examine the ability to replicate complex business processes in current ERP market system offerings. (Team 2)</p> <p><i>This has yet to begin. This is contingent on approval and funding of the University Business Process Review Proposal discussed in 1.6.1.</i></p>	07/01/16, 06/30/18	0% ERP which can implement future enterprise business processes (not necessarily current business processes.)		As of 06/29/17
<p>1.6.3 Evaluate the ability of the University of Illinois to redesign business processes to most efficiently utilize multi-tenant ERP cloud services. (Team 2)</p>	07/01/15, 06/30/18	25% Inventory of future state enterprise	20%	As of 06/29/17

AITs has completed the first review of business processes. This is contingent on approval and funding of the University Business Process Review Proposal discussed in 1.6.2. Once the proposal has been approved, the clients will provide final review and approval of business processes and future state (standardization, etc.). Some evaluation of multi-tenant ERP cloud services has been done, but nothing can move forward until the business process review is complete.

business processes, reducing complexity and increasing efficiency as possible.

1.6.4 Create Request for Information for next Enterprise Resource Planning (ERP/Currently Banner) System Replacement. (Team 2)

01/01/17,
06/30/18

25% RFI/RFP for ERP system, which is based on future state business processes.

0%



As of 06/29/17

This has yet to begin. This is contingent on approval and funding of the University Business Process Review Proposal discussed in 1.6.1. RFI/RFP is Phase 3 of the Proposal.

1.7 Collaborate with individuals and groups with process improvement theory and execution expertise to provide more opportunities for projects, training and other BPI Shared Service programming. (Team 1) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.7.1 Establish relationships on each campus with process improvement theory and execution experts, including faculty, leveraging their knowledge and experience to develop opportunities for additional education and outreach. (Team 1)</p> <p><i>Established the process improvement facilitator program at both UIUC and UIC. The third facilitator cohort graduated in May 2017. Program continues into FY18.</i></p>	07/01/15, 06/30/18	20 Number of experts actively engaged in BPI Shared Service discussions and activities.	26	As of 06/20/17
<p>1.7.2 Establish relationships with those leading relevant student-based groups (e.g., Illinois Business Consulting on the Urbana campus) and faculty, providing opportunities to incorporate students on BPI Shared Service projects and activities. (Team 1)</p> <p><i>Partnered with the UIUC College of Business MSTM program for their innovation challenge including 120 student participants. Next event being planned for Fall 2017.</i></p>	07/01/15, 06/30/18	2 Number of student-based groups and faculty actively involved in BPI Shared Service projects and activities.	1	As of 06/20/17


1.8 Raise awareness of and participation in process improvement initiatives and opportunities throughout the University. (Team 1) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.8.1 Develop a forum for regularly promoting process improvement activities, showcasing successes and sharing lessons learned. (Team 1)</p> <p><i>Continue to execute quarterly community series events on the Urbana campus. The community series event is now active in Chicago and scheduled quarterly. The first process improvement showcase event occurred in Urbana in September 2016.</i></p>	07/01/15, 06/30/18	8 # of process improvement events executed per year.	8	As of 06/20/17
<p>1.8.2 Develop a program to increase the number of skilled process improvement facilitators and analysts at the University. (Team 1)</p> <p><i>The BPI Facilitator Program is active in both UIC and UIUC. The third cohort program graduated in May 2017.</i></p>	07/01/15, 06/30/18	10 Number of employees who have completed the Process Improvement Facilitator Training Program	26	As of 06/20/17

1.8.3 Establish a network of functional subject matter experts to assist in improvement BPI efforts, providing guidance and sharing best practices. (Team 1)

BPI Facilitator graduates are regularly staffing BPI projects.

07/01/15, 06/30/18	5 Number of functional areas with identified subject matter experts on each campus.	6		As of 06/20/17
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1.9 BPI Shared Service will seek opportunities with other higher education institutions, through organizations like the Network for Change and Continuous Innovation (NCCI) in Higher Education, to collaborate on process improvement initiatives. (Team 1) (06/30/18)

Comments on Status: Presented at NCCI conference in July 2016: "Games and Activities for Teaching Lean". BPI also held a Higher Education Lean Exchange event in May 2017, for Lean Practitioners in higher education to collaborate and exchange ideas.





Measure: Number of opportunities to collaborate with other higher education institutions on process improvement initiatives.

Target: 1

2	
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1.10 Provide business process improvement services to the University that result in improved efficiency and effectiveness of departments across the University. (Team 1) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>1.10.1 Develop a comprehensive process improvement training program and toolkit designed to promote unit directed process improvement initiatives and increase the process capability levels across the University. (Team 1)</p> <p><i>The process improvement toolkit has been published to the BPI Shared Services website and 20 projects were completed as part of the BPI Facilitator Training program.</i></p>	07/01/15, 06/30/18	20 Number of known non-BPI Shared Service projects executed using training and tools provided through the Process Improvement Toolkit.	28	 As of 06/20/17
<p>1.10.2 Train 200 University of Illinois staff per fiscal year on the concepts and techniques of process improvement initiatives. (Team 1)</p> <p><i>Training goal exceeded for FY17.</i></p>	07/01/15, 06/30/18	200 Number of U of I staff trained per year.	270	 As of 06/20/17
<p>1.10.3 Double Business Process Improvement Shared Service project capacity by developing and leveraging BPI Shared Service volunteers. (Team 1)</p> <p><i>We've increased project capacity from extended team members, but core team capacity has been affected by turnover and a lack of rehiring. This will continue into FY18.</i></p>	07/01/15, 06/30/18	40 # of process improvement efforts (i.e., projects and work requests) completed per fiscal year	19	 As of 06/20/17
<p>1.10.4 Deliver \$4 million return on investment per year on Business Process Improvement Shared Service projects and related efforts. (Team 1)</p> <p><i>Will be updating potential benefits as projects close and potential benefits are calculated.</i></p>	07/01/15, 06/30/18	\$3,000,000 Aggregate potential benefits of implementing BPI project recommendations.	\$30,410	 As of 07/26/17


2 Organizational Effectiveness


2.1 Provide leadership, direction, and guidance for the strategic initiatives that enable AITS to hire, grow, and retain a talented workforce that’s highly motivated and committed to achieving organizational objectives. (Team 4)
(06/30/18)




INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>2.1.1 Document, communicate, and implement a plan for continual improvement and enhancement of the AITS culture, positioning AITS as an employer of choice within the University of Illinois. (Team 4)</p> <p><i>AITS has continued to act on the organizational action items from the small group meetings, and seeks regular input from employees. Additional follow-up to the telecommuting survey is underway, and the information will be used to formulate a more detailed plan for cost savings, changing the way we do work, and improve the employee experience.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	As of 07/10/17
<p>2.1.2 Actively involve AITS managers, leaders, and employees in initiatives to improve the AITS environment, culture, and/or workplace practices/processes. (Team 4)</p> <p><i>Multiple employees have completed their experiential learning programs. Some employees have returned to their original role, some continue to perform some of the responsibilities they learned as a result of the experience on an ongoing basis, and others have been successful candidates in open and competitive searches and were hired into a new role in the organization as a result of broader experience gained through this program. Employees have taken the initiative to create and participate in wellness initiatives and a walking challenge. As a result of the peer recognition program, recognition has become more of a habit, and we now have a means to share the recognition across the organization.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	As of 07/10/17
<p>2.1.3 Provide employee forums for open discussions about matters affecting the workplace experience. (Team 4)</p> <p><i>AITS regularly encourages feedback from employees in various formats (email, face-to-face, pulse surveys, through peers, etc.). Regular use of anonymous feedback mechanisms is a solid step in building trust amidst uncertainty - employees ask REAL questions and receive REAL answers. We are pleased with the open and direct inquiries we receive as well as the opportunity to respond to them in a public forum so everyone is receiving consistent information.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	As of 07/10/17
<p>2.1.4 Act as a catalyst for ongoing organizational conversations relating to the importance of leadership and employee support for and participation in people-related initiatives on AITS’ ability to achieve its objectives. (Team 4)</p> <p><i>In FY17, AITS had a net reduction of twenty-three FTE. AITS is fortunate to have high demand customer requests that provide interesting work for our employees; however, the fiscal climate and constrained hiring guidelines take their toll over time, and the associated resource challenges are difficult to overcome. AITS leadership continues its regular, ongoing strategic workforce planning discussions to align available resources and skillsets with priorities to ensure services continue to be implemented effectively and deliver optimized value. Employees are encouraged to provide input regarding the employee experience. As a result of these conversations, we’ve had positive retention opportunities as we aligned individual development goals and organizational needs. AITS remains flexible and focused on retention. Openness to feedback about the employee experience allows AITS to create and adapt programs and practices in areas we can influence.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	As of 07/10/17
<p>2.1.5 Share ongoing workplace initiative updates with AITS staff at business meetings and via other communication mechanisms. (Team 4)</p> <p><i>Communication remains a high priority in AITS, and we take a proactive approach to providing information to employees and customers. The method by which we respond is carefully considered and planned so timely, factual information is provided. This has been especially important and appreciated with regard to alignment/engagement discussions and department head/CIO departure in recent months.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	As of 07/10/17
<p>2.1.6 Encourage active cross-sectional participation by identifying champions and establishing committees to recommend and implement initiatives to improve the AITS culture/work environment. (Team 4)</p> <p><i>In the latter months of FY17, representatives from twelve System Office IT organizations came together to discuss the roles of their IT employees in an effort to consider possible models for integration of IT functions within AITS, and the teams identified three outcomes, one of which recommended the move of 25 System Office IT employees into AITS.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	As of 07/10/17






Simultaneously, AITS, ACCC, and Technology Services have been working together to increase engagement and share experiences and best practices while identifying areas in which we might collaborate in delivery of IT services.

2.1.7 Provide relevant information to increase awareness of cultural aspects and support its continual integration for improved organizational health. (Team 4)	07/01/15, 06/30/18	100% Ongoing	100%	 As of 07/10/17
<i>AITs continues to seek out opportunities to enhance organizational health, and employees are encouraged to recommend, lead, and participate in activities that enhance personal and professional relationships.</i>				

2.1.8 Assess performance against strategic initiatives and provide quarterly strategic plan status updates. (Team 4)	07/01/15, 06/30/18	100% Ongoing	100%	 As of 07/10/17
<i>Quarterly updates regarding human capital/organizational effectiveness initiatives are provided at AITS business meetings and progress is tracked via quarterly strategic plan updates, in the AITS annual report and updated to the AITS intranet site as updates become available.</i>				

2.2 Continually improve people-related programs and practices and the processes required to support them. (Team 4) (06/30/18)

Measure: Ongoing
Target: 100% 

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
2.2.1 Professional Development: Create and implement a professional development strategy that utilizes both traditional/formal and informal development, thereby supporting employees' and managers' ongoing professional development and strengthening their skills and contributions throughout their careers. (Team 4)	07/01/15, 06/30/18	100% Ongoing	100%	 As of 07/10/17
<i>Supervisors and employees have moved away from the once per year performance appraisal/review discussion to a more agile model that centers on more frequent conversations. An integral part of this is an ongoing discussion of objectives and professional development needs as they relate to organizational priorities. Student assistance with Stage 1 (documentation) of career lattices continues.</i>				
2.2.2 Performance Management: Utilizing existing HR systems and resources developed for supervisors and employees, move performance management beyond appraising past performance to providing continual feedback to develop employees' future potential/capability and help supervisors develop related skills and abilities. (Team 4)	07/01/15, 06/30/18	100% Ongoing	100%	 As of 07/10/17
<i>AITs has formalized its ongoing talent conversations as the preferred method of performance management. The system office performance appraisal form will remain the required tool of record, and it can easily be adapted as the repository to capture the ongoing talent conversation highlights and resulting priorities/development goals. The Electronic RCAF and telecommuting forms have been in production for six months, and updates to program documentation are underway.</i>				
2.2.3 Recognition: Create and implement recognition programs, both formal and informal, to recognize employees and reward them for work and behaviors that support/further the mission, goals, values and initiatives of AITS. (Team 4)	07/01/15, 06/30/18	100% Ongoing	100%	 As of 07/10/17
<i>AITs is well on its way to a recognition culture! We will continue to develop and improve programs and practices that support this as needed to continue to make recognition second nature.</i>				
2.2.4 Engagement: Analyze engagement survey results, share results at the division and group level (where available), create action plans to address concerns and improve on strengths, act on findings and implement group action plans to enhance the AITS work environment. We will show results over the next 18-24 months before planning to conduct a follow-up survey to measure the effect of implemented actions. (Team 4)	07/01/15, 06/30/18	100% Complete	100%	 As of 07/10/17
<i>Pulse surveys continue to be conducted on an ongoing basis. Work is done continuously in leadership team discussions to align employee development goals with organizational needs, and employees are encouraged to take an active role in making supervisors and leadership team members aware what will improve their experience so it can be acted upon accordingly (where possible). Feedback has been received regarding how we might further improve the employee experience through the elements of culture, technology, and physical space, and it is factored into planning activities in these areas.</i>				
2.2.5 Process Improvement: Work toward designing, implementing, and assessing employee and workplace practices by the standard of how well they help (1) employees develop and (2) the	07/01/15, 06/30/18	100% Ongoing	100%	

organization achieve its objectives. Focus on long-term solutions by examining business processes associated with current practices and implementing changes designed to save time and improve ease of use, speed to service, and collaboration. Assess the results and continue to refine. (Team 4)

As of 07/24/17

An on-boarding toolkit was developed as a strategic retention tool. Since recruitment has slowed substantially this fiscal year, improvement efforts are now being focused in the areas of performance, engagement, and work environment. For FY17, effort continues to be on culture, technology/processes, and physical space and how updating/improving current business processes/practices can help improve the employee experience and save time and improve ease of use, speed to service, and collaboration. This is an ongoing effort, and we continue to learn and adapt as priorities and resources require.

2.2.6 Strategic Workforce Planning: Hold workforce planning strategy discussions at each Leadership Team meeting. Focus on current and future workforce needs to support the budgeting process; support strategic initiatives; project organization-wide staffing needs; anticipate and plan for employee development; deploy staff and organize work; manage organizational culture; and anticipate and manage risk. (Team 4)

07/01/15,
06/30/18

100%
Ongoing

100%



As of 07/10/17

Regularly occurring discussions are held at the leadership level regarding resource needs and organizational priorities. In recent months, with the System Office IT Alignment, participation in this area included facilitation of resource planning activities, acting as liaison to System HR Services, and providing summary reports, communications, etc., to leadership to support the initiative. Increased engagement with Technology Services has been a prominent aspect of workforce planning in recent months as well.

3 Financial Stewardship

3.1 Create and maintain FY16-FY18 Financial Plan. (Team 4) (06/30/18)




INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>3.1.1 Create a budget scenario for each fiscal year and manage adjustments throughout each FY as needed. (Team 4)</p> <p><i>In FY17 we were given a partial allocation and were also instructed to work on a 10% holdback, so this and other scenarios have been completed. Since a budget has now been passed, we await information on what the FY17 allocation is to close out the FY17 fiscal year.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	<p>As of 07/10/17</p>
<p>3.1.2 Provide for strategic workforce planning which takes into consideration human capital needs and requests, strategic plan, salary increases, promotions, new hires, and reductions if required. (Team 4)</p> <p><i>At all of the bi-weekly leadership meetings, we have strategic workforce planning conversations, topics of which include prioritization of human capital resource requirements, strategic plan resource impact, promotional recommendations, and any other issues impacting workforce planning. In Q4, planning efforts associated with the System Office IT Alignment initiative and increased engagement with Technology Services were significant areas of focus.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	<p>As of 07/10/17</p>
<p>3.1.3 Support organizational procurement initiatives by incorporating new required procedures for new laws and policies. (Team 4)</p> <p><i>We have incorporated new procedures (e.g., incorporation of multiple quotes for each purchase) and have advanced diversity procurement procedures for IT consulting contracts. We continue to interact and have regular status meetings with University Procurement. Preliminary conversations regarding the opportunities a centralized strategic IT procurement function at the System Level would offer are planned.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	<p>As of 07/10/17</p>
<p>3.1.4 Support strategies for cost recovery and cost effective options. (Team 4)</p> <p><i>Work to develop an MOU as backup documentation for agreements for non-standard services has started. There are also efforts for new initiatives underway.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	<p>As of 07/10/17</p>
<p>3.1.5 Provide financial status information as appropriate through existing communication channels of quarterly meetings, SharePoint updates, and internal newsletters. (Team 4)</p> <p><i>Updates are given at quarterly meetings and in the annual report.</i></p>	07/01/15, 06/30/18	100% Ongoing	100%	<p>As of 07/10/17</p>
<p>3.1.6 Provide financial status information to external groups in the form of reports and presentations. (Team 4)</p>	07/01/15, 06/30/18	100% Ongoing	100%	

Reports have been provided to the President, internal/external review committees, the Vice-President for Academic Affairs, the university CIOs, and Technology Services.


As of 07/10/17

3.1.7 Utilize Activity Based Costing and IT portfolio management to better understand, allocate, and report on IT resource usage and project and service performance. (Team 1)


07/01/15, 06/30/18 100% Ongoing 100%  As of 06/20/17





FY17 ABC activities and summaries are in progress. In addition, AITS PMO is actively monitoring resource usage and project performance and implementing improvements to reporting these items.


3.1.8 Examine and improve the funding model for AITS. (Team 1)


07/01/15, 06/30/18 50% Ongoing 50%  As of 06/20/17

AITS has produced detailed analyses on the costing and consumers of AITS services. The summation of this work is available on the AITS website at: <https://www.aitis.uillinois.edu/cms/One.aspx?portalId=558&pageId=333702> under How Much It Costs. This has been reviewed with campus budget officers, campus CIOs, and other leadership. This information will be an input to future funding model modifications for AITS. A budgeting model for System Offices is in development.

3.2 Pursue opportunities to provide productivity increases or cost reductions to the University via enterprise IT initiatives. (Team 1) (06/30/18) 

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
3.2.1 Utilize enterprise IT for business processes to provide productivity increases for university constituents. (Team 1) <i>This has been completed and our BCR is 5.</i>	07/01/15, 06/30/18	300% BCR of implemented ITPC projects.	500%	 As of 06/20/17
3.2.2 Measure and report on productivity increases to university constituents via enterprise IT support of business processes. (Team 1) <i>A process has been put into place to calculate BCR on an annual basis. The next step is to identify where and to whom to provide this information.</i>	07/01/15, 12/30/16	75% Formally report on productivity gains of completed ITPC projects.	75%	 As of 06/20/17
3.2.3 Look for opportunities where outsourcing or insourcing reduces cost, reduces risk, increases customer services/satisfaction. (Team 1) <i>This is an ongoing process. Recent outsourcing/insource evaluations have occurred with a number of ITPC projects and for some strategic resources. AITS completed a review of hardware and software maintenance contracts to explore new models and cost reductions which will result in cost reductions in FY17 for select items.</i>	07/01/15, 06/30/18	50% Analysis of services for insourcing/outsourcing is complete. Ongoing process.	50%	 As of 06/20/17
3.2.4 Partner with other organizations to investigate offering shared services to the university community that are cost-effective. (Team 1) <i>AITS actively looks for shared service opportunities and has set a process in place for implementing shared services. In addition, AITS helped establish and participates in the multi-campus Shared Services Committee. AITS is actively partnering with Technology Services to identify areas of collaboration to improve services and reduce costs.</i>	07/01/15, 06/30/18	100% Ongoing posture in place to seek opportunities for shared services.	50%	 As of 06/20/17

3.3 Pursue new revenue opportunities where they are beneficial and cost-effective to the University. (Team 1) (06/30/18) 

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
3.3.1 Offer consolidation of decentralized commodity services at a lower overall cost to the University based on providing those services at scale. (Team 3) <i>AITS is actively participating on the IT Power Plant and Data Center Shared Services. AITS has been actively investigating AWS as another platform for commodity services including servers, databases, and desktops. Work also continues with Banner remote application development which would allow users to use Banner in the RDP and not place the lagging browser requirements on their machines. AITS has been actively working with Tech Services and ACCC to form partnerships in the areas of data center management, desktop support, endpoint management, and security.</i>	07/01/15, 06/30/18	30% 100% Participation from units in consolidation of decentralized commodity services.	30%	 As of 07/06/17


<p>3.3.2 Partner with university and campus units to develop large strategic information systems that provide broad benefits, return on investment, and further the accomplishment of strategic and operational goals. (Team 2)</p> <p><i>No progress aside from the ongoing IAM project. Similar to 1.1.1 above, the challenge is to inform and convince campus units that AITS is eager, willing and has the resources to work jointly with them to implement strategic information systems.</i></p>	<p>07/01/15, 06/30/18</p>	<p>75% Recognition by campus units that AITS is willing and eager to work with them to implement strategic information systems and the launching of one such initiative by end of FY18.</p>	<p>50%</p>	<p> As of 07/24/17</p>
<p>3.3.3 Provide fee-based IT services where these services provide cost effective options to department that need temporary or permanent services that are not available with their own resources and outsourcing from outside the university is cost prohibitive. (Team 1)</p> <p><i>AITs currently provides fee-based work for such services as server hosting and database administration. In addition, AITS has put in place the necessary programs to charge for business process improvement, records and information management, applications and mobile development, and project management for both internal and external University clients.</i></p>	<p>07/01/15, 06/30/18</p>	<p>100% Services are available, priced, and marketed as needed. Ongoing thereafter.</p>	<p>100%</p>	<p> As of 07/24/17</p>
<p>3.3.4 Seek opportunities with other state higher education institutions to share or host commodity services among multiple institutions. (Team 3)</p> <p><i>We are exploring Banner Hosting services with Southern Illinois University, North Eastern Illinois University, and Chicago State. We also continue to participate in IPATHE. The proposal was submitted to North Eastern Illinois University to host Banner and associated systems at UI. We are awaiting a decision from them on how to proceed. We have begun hosting DR servers in the RRB data center for Illinois State University. We have engaged the State of Illinois on a video conferencing project to support underserved secondary Education districts by providing University infrastructure to assist in instructional delivery.</i></p>	<p>07/01/15, 06/30/18</p>	<p>50% 100% Opportunities explored and developed proposals and models to achieve.</p>	<p>50%</p>	<p> As of 07/06/17</p>
<p>3.3.5 BPI Shared Service will expand fee-based services, providing units able to cover costs with more timely services for a fraction of the cost of similar services offered in the external marketplace. (Team 1)</p> <p><i>We finalized our menu of services and published them to the website. We have setup a self-supporting account for accommodating consulting logistics. We have established standard Memorandum of Understanding for fee-based services.</i></p>	<p>07/01/15, 06/30/18</p>	<p>100% Services are available, priced, and marketed as needed. Ongoing thereafter.</p>	<p>100%</p>	<p> As of 06/20/17</p>

COLLABORATION/COMMUNICATION SERVICES & IT GOVERNANCE AREAS & GOALS

4 Collaboration and Communication Services

4.1 Provide business relationship/development management services to improve relations with constituents. (Team 1) (06/30/18)





INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>4.1.2 Actively solicit performance feedback from constituents and transparently address areas of concern. (Team 1)</p> <p><i>Customer performance feedback pilot is being executed for Application Support using PEAR as a pilot. Plan developed for the next 24 months to survey through a number of different applications. AITS Customer Service survey was launched in December 2016.</i></p>	<p>07/01/15, 06/30/17</p>	<p>100% Improvements implemented.</p>	<p>100%</p>	<p> As of 06/20/17</p>

4.2 Provide the right tools and environments to facilitate collaboration and remove barriers. (Team 3) (06/30/18)






Comments on Status: We have started an exploration of Amazon web services. We are also doing a clean up of SharePoint security and aligning security practices to make it easier.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>4.2.1 Establish both physical and virtual spaces conducive for increased collaboration. (Team 3)</p> <p><i>The area at the entrance has been turned into a collaboration area. We are looking for additional space that would be used for quiet space. We are considering using frequently vacant offices or empty offices. We are also looking for opportunities to have server farms for people who are exploring new technology. We have upgraded some of the equipment in conference rooms such as Polycom and monitors. Stand up workstations continue to be used by number of employees and more are available upon request. Upgrades of Polycom systems have also been put in place that more easily allow Lync to be used automatically with the video conferencing equipment. Surveys have been done to determine benefits and drawbacks of working from home and are being used to determine if we will move forward with shared hotel space or other options. A pilot is planned and targeting to be fully implemented by the end of the year.</i></p>	07/01/15, 06/30/18	30% 100% Physical and Virtual Space available for collaboration.	30%	 As of 07/06/17
<p>4.2.2 Provide desktop training to enhance the knowledge of areas that we are already familiar with. (Team 3)</p> <p><i>We are planning to have brownbag and open house sessions to teach people how to use their machines, Polycom, Mondo pad among others. A few brown bag sessions have been held and are continuing. Tech tips newsletters are also being created to send to people by Communications Team..</i></p>	07/01/15, 06/30/18	30% 100% Provide training on desktop and conference room services	30%	 As of 07/06/17

4.3 Collaborate with other IT groups across the university to provide new and improved services. (Team 2) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>4.3.1 Implement a training management system to be utilized for training and tracking staff, students, and faculty for job-related development and certification purposes. An ITPC project is in progress. (Team 2)</p> <p><i>The technical evaluation scores of the RFP have been reviewed by the SPO. Once these are finalized, pricing will be opened and then a decision can be made on a vendor.</i></p>	07/01/15, 06/30/18	75% Implemented system for training management and used by at least 2 business areas.	75%	 As of 07/26/17
<p>4.3.2 Analyze and develop a support and ownership model for all shared services. Where new resources are required for AITS, identify the source of new resources or the associated tradeoff with current services. (Team 1)</p> <p><i>AITs developed a shared service implementation process using lessons learned from the Box, Endpoint Management, and SharePoint shared services. These materials have been provided to the multi-campus Shared Services Committee.</i></p>	07/01/15, 06/30/18	0 100%	0	 As of 06/20/17
<p>4.3.3 Implement a solution or an interface to integrate Banner with various learning management systems. This integration is used to simplify the management of class registration and grades between the various systems. An ITPC project has been approved but is awaiting vendor software. (Team 2)</p> <p><i>This project has been on hold for several years. Ellucian has just recently updated their ILP (Integrated Learning Platform.) In order to move forward with this project, we will have to perform additional analysis to understand the new technical requirements and re-evaluate the technical environment. Aside from the LMS software, there are several Student Digital Experience initiatives underway, including an At-risk Student Early Alert initiative. At UIUC, there is a provost committee looking at this, and at UIC, the IPAS committee is starting an RFP to look at student success software.</i></p>	07/01/15, 06/30/18	100% Provide integration of LMS with Banner.		 As of 06/29/17

5 IT Governance

5.1 Promote and support IT governance that is empowered, accountable, and transparent in order to better support the mission activities of the University. (Team 1) (06/30/18)



Comments on Status: This is an ongoing activity. Communication improvements are underway.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>5.1.1 Participate on the University of Illinois Information Technology Leadership Team and its subcommittees including the Security, Business Intelligence/ Performance Management, Shared Services Governance Group, and Common Architectural Vision committees. (Team 1)</p> <p><i>AITs actively participates in the above committees as well as facilitating the majority of them. The Common Architectural Vision committee has been disbanded. Its role is being filled by the UI Enterprise Architecture Committee, of which AITS is an active participant.</i></p>	07/01/15, 06/30/18	100% Active membership on all appropriate committees. Ongoing.	100%	As of 07/24/17
<p>5.1.2 Continue participation with the UIC IT Governance committees. (Team 1)</p> <p><i>AITs staff are active members on all the appropriate committees. In addition AITS facilitates communications between these committees and the UI ITPC.</i></p>	07/01/15, 06/30/18	100% Active membership on all appropriate committees. Ongoing.	100%	As of 07/24/17
<p>5.1.3 Continue participation with the UIS IT Governance committees. (Team 1)</p> <p><i>AITs participates on an as needed or as requested basis with UIS IT Governance and maintains ongoing relationships with members of the UIS IT Governance community.</i></p>	07/01/15, 06/30/18	100% Active membership on all appropriate committees. Ongoing.	100%	As of 07/24/17
<p>5.1.4 Continue participation with the UIUC IT Governance committees. (Team 1)</p> <p><i>AITs staff are active members on all the appropriate committees. In addition AITS facilitates communications between these committees and the UI ITPC.</i></p>	07/01/15, 06/30/18	100% Active membership on all appropriate committees. Ongoing.	100%	As of 07/24/17
<p>5.1.5 Work with the System Offices IT Council on an ongoing basis to collaborate with our System Office partners. (Team 1)</p> <p><i>System Offices IT Council continues to meet on a quarterly basis with a full agenda. AITS staff are active members in this group and AITS facilitates communications between these committees and the UI ITPC.</i></p>	07/01/15, 06/30/18	100% Facilitate and participate with the System Offices IT Council.	100%	As of 07/24/17

5.2 Perform a periodic assessment of the Information Technology Priorities Process. (Team 1) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>5.2.4 Implement approved ITPC review recommendations. (Team 1)</p> <p><i>Improvements have been implement, including updating rating sheet for strategic focus, strategic planning summit, revisions to project proposal templates, and the ITPC Community.</i></p>	07/01/16, 06/30/17	100% Recommendations implemented and operational.	100%	As of 07/24/17

5.3 Promote and support Information Lifecycle Governance principles to ensure that records and other information assets created and used to support the mission activities of the University are easily identified, effectively protected and retained for as long as they are needed, and securely deleted, purged or transferred to the University Archives at the right time. (Team 1) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>5.3.1 Develop inventories of systems and repositories containing records and other information assets that have retention requirements or clear business needs. (Team 1)</p> <p><i>Preliminary research has been completed with OBFS-Business Solutions & Support Operations, University of Illinois at Springfield - Information Technology Services (ITS) and the IT Power Plant groups. Current efforts are focusing on</i></p>	07/01/15, 06/30/18	75% Create and maintain baseline inventories for each campus and	60%	As of 07/24/17

refining the list of systems and repositories in light of the unification of services occurring throughout the University system and the incorporation of systems by IT Shared Services. Research continues with ever widening reach into local units through activities like the Caffeine breaks and direct contact with data originators. Metadata schemas are under development realigning with metadata from the evolving IT Service Catalogs and Data security measures.

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5.3.2 Coordinate and collaborate with others interested in establishing good guidance for managing the varied levels of the University's information assets. (Team 1)

RIMS continues to chair a university-wide task force establishing recommendations for the management of digital content and prioritizing content left behind by individuals who have left the University. Preliminary recommendations have been made and final recommendations for this first phase of the task force work are expected by the end of September 2017. RIMS is participating on the UIUC Data Management Committee tasked with providing guidance and recommendations for standardizing how various types of data are managed. RIMS is also leading efforts to standardize the use of email retention policies on the Exchange servers, starting first with University System offices. This work will be ongoing through FY18.

07/01/15,
06/30/18

75%
Complete all unit
engagements

75%



As of 07/24/17

5.3.3 Support the deployment and easy use of centralized digital repositories and physical storage facilities for housing information assets particularly those that are essential to the business need of the department or otherwise have retention requirements. (Team 1)

Department-level support for the physical storage of information assets remains consistent across all three campuses. A vendor supported inventory product has been purchased and will be deployed during FY18 to support better controls on the stored materials. As the Urbana site for the Chicago College of Medicine is shutting down, we are facilitating the transfer of their physical records to the Chicago site and the use of Xtender as a digital repository. We continue to support department-led efforts to identify archival materials and segregate them from administrative records.

07/01/15,
06/30/18

75%
Develop guidance
and processes for
use by
departments

60%



As of 07/24/17

5.3.4 Participate in opportunities to affect changes to State and University rules and policies that will increase our ability to be transparent, accountable, and provide for trustworthy management of the University's information assets. (Team 1)

We continue to work with the State Archives to establish standards of practice for the procurement and management of email from the governor's office. We have begun work on a three year grant that will support the long-term deposit of and access to this correspondence which will in turn inform our practices within the University of Illinois. We explored an opportunity to help the State Records Management field reps perform their records review tasks more efficiently.

07/01/15,
06/30/18

75%
Participate in 6
specific
engagements

75%



As of 07/24/17

INFORMATION SECURITY AND PRIVACY & INFRASTRUCTURE AREAS & GOALS

6 Information Security and Privacy

6.1 Improve audit and compliance capabilities. (Team 5) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>6.1.1 Manage internal and external audit engagements, including coordination, remediation of open findings, and communication with various groups including senior management, human resources, information technology groups, and the security working group. (Team 5)</p> <p>We've begun the FY17 expanded IS audit with CLA and OAG.</p>	07/01/15, 06/30/18	67% 100% audit engagements complete	67%	 As of 07/24/17
<p>6.1.2 Develop HIPAA compliant infrastructure within the University. Provide recommendations for HIPAA procedures to users and facilitate formal approval process from data owners. (Team 5)</p> <p>We're working on DSCC project with go-live in July 2017 and working on Disability Resources project that will be hosted in AWS. A future project will include legal files for legal counsel.</p>	07/01/15, 06/30/18	67% 100% HIPAA compliant	67%	 As of 06/28/17
<p>6.1.4 Implement ongoing compliance monitoring. Develop and track compliance checkpoints for security and other identified compliance areas. (Team 5)</p> <p>We are working on an assessment related to Illini Secure (SCISM) and continuing to work on projects related to HIPAA related data.</p>	07/01/15, 06/30/18	67% 100% ongoing compliance monitoring	67%	 As of 07/24/17

6.1.5 Continue to identify training gaps for existing employees, provide security training to new employees within University Administration, and provide training pursuant to active audit findings. (Team 5)

07/01/15, 06/30/18	67% 100% security training to UA employees	67%		As of 06/28/17
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The HIPAA training guidelines and materials from University HIPAA officers has been completed and are in use. Staff training for FY17 was completed, FY18 to commence in November.

6.2 Protect user and administrative accounts from theft and exploitation by attackers. (Team 5) (06/30/18)




INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
6.2.1 Reduce likelihood of phishing attacks within UA by enabling active phishing prevention software (TAP), providing DNS blocking of malicious sites based on reputation services, and attempting to phish employees to identify additional training needs. (Team 5) <i>SWG is evaluating self phishing products. The system offices are investigating the Technology Services DNS to prevent phishing attacks.</i>	07/01/15, 06/30/18	67% 100% protection from attackers for users within UA	67%	 As of 06/28/17
6.2.2 Implement multi-factor authentication for privileged administrative accounts, including remote access. (Team 5) <i>Multi-Factor has been added to Solaris 11 servers. VPN support is planned for FY18 and a proof of concept complete.</i>	07/01/15, 06/30/18	50% 100% protections from attackers for users within UA	67%	 As of 06/28/17
6.2.3 Implement multi-factor authentication for existing AITS applications, including Banner Forms to address a finding from internal audits. (Team 5) <i>In September, Multi-factor authentication will be implemented for Banner forms. HRFE and PARIS multi-factor will be implemented in October.</i>	07/01/15, 06/30/18	67% 100% protections from attackers for users within UA	67%	 As of 06/28/17
6.2.4 Implement multi-factor for authentication infrastructure. (Team 5) <i>Token claiming and bypass codes will be completed in July. Webstore process is in place for Token purchases. The self-management portal is being re-skinned.</i>	07/01/15, 06/30/18	67% 100% protections from attackers for users within UA	67%	 As of 06/28/17

6.3 Prevent installation, spread, and execution of malicious software on user and infrastructure platforms. (Team 5) (06/30/18)








INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
6.3.1 Improve tracking of repairs for viruses detected on workstations and servers. (Team 5) <i>All virus alerts are evaluated and appropriate measures have been monitored. Documentation regarding how to respond to alerts has been created and distributed to client services support. Tickets are being created for issues that meet certain criteria for tracking.</i>	07/01/15, 06/30/18	50% 100% tracking of repairs	75%	 As of 06/28/17
6.3.2 Engage in risk reduction for workstations patching practices. Monitor compliance, set thresholds, and identify systems and software absent from necessary maintenance. (Team 5) <i>A routine report is needed to evaluate workstations that have fallen behind for patching. Security will work with Desktop Support.</i>	07/01/15, 06/30/18	67% 100% engagement for workstations patching practices	40%	 As of 07/24/17
6.3.3 Evaluate workstation anti-virus software. Determine whether advanced malware detection, workstation IPS/IDS, and other threat detection enhancements are needed beyond today's SCEP implementation. (Team 5) <i>IPS/IDS functionality is being investigated, which may come as log functionality. We have made additional progress with utilizing Technology Services logging.</i>	07/01/15, 06/30/18	67% 100% evaluation of work station anti-virus software	85%	 As of 06/28/17


6.3.4 Install remote Desktop environment for Java and IE Enterprise Mode. (Team 5)





07/01/15, 06/30/18 100% 100% installation complete 100%  As of 02/20/17

The installation completed.

6.4 Enhance network monitoring apparatus to further discover and alert upon potentially compromised accounts and computing systems. (Team 5) (06/30/18) 

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
6.4.1 Investigate additional network intrusion detection for UA employee offices and the AITS Data Centers. (Team 5) <i>We are aligning our security support more closely with Technology Services and want to evaluate their recommendations in this area.</i>	07/01/15, 06/30/18	25% Investigation completes	25%	 As of 06/28/17
6.4.2 Monitor network data outflows using distributed collection points at UA employee offices and the AITS Data Center. Aggregate flow data in reporting console for reporting and alerting. (Team 5) <i>We have a process in mind that we will implement in FY18.</i>	07/01/15, 06/30/18	0% 100% monitoring of network data outflows	40%	 As of 06/28/17
6.4.3 Refine log collection practices to identify necessary logging data, provide central storage, and to ensure adequate retention. (Team 5) <i>This work needs to be evaluated by Enterprise Architecture Committee and align with Illini Secure.</i>	07/01/15, 06/30/18	50% Refinement of log collection practices complete	50%	 As of 07/24/17
6.4.4 Implement log correlation functionality based on an evaluation of desirable commercial products, an understanding of readily available internal alternatives, and a balance of operational resources versus business objectives and requirements. Include dashboards for reporting such as authentication and user to IP identification. (Team 5) <i>We met with Tech Services to adopt Splunk. We will be piloting Splunk for HIPAA log monitoring.</i>	07/01/15, 06/30/18	50% 100% implementation of log correlation functionality	67%	 As of 06/28/17

6.5 Prevent the unintended, unnecessary, or unauthorized flow of data from trusted computing systems and networks. (Team 5) (06/30/18) 

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
6.5.1 Implement 802.1X authentication for UA employee office networks. (Team 5) <i>This initiative is being piloted in late FY18.</i>	07/01/15, 06/30/18	50% Authentication implemented	5%	 As of 06/28/17
6.5.2 Move sensitive servers to private network zone and further limit access to private zone, thereby preventing the possibility of unintended direct Internet contact. (Team 5) <i>SCISM is in progress to classify every system and results will be recorded in CMDB.</i>	07/01/15, 06/30/18	25% 100% sensitive servers moved to private network zone	33%	 As of 06/28/17
6.5.3 Eliminate sensitive data from servers in public zone, either through removal, or by migrating sensitive data to private network zone. (Team 5) <i>We are evaluating additional functionality provided by Oracle called Obfuscation and Mask for use in Banner.</i>	07/01/15, 06/30/18	25% 100% sensitive data eliminated from servers in public zone	33%	 As of 07/24/17
6.5.4 Tighten firewall to align with currently active audience. Implement secondary firewall controls in ISP boarder routers. (Team 5) <i>FY18 Firewall Audit is ready to begin in July.</i>	07/01/15, 06/30/18	50% Firewall controls implemented	67%	 As of 06/28/17

6.6 Enhance protection mechanisms for sensitive information stored within computing systems. (Team 5) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>6.6.1 Identify high-risk users of sensitive information in University Administration and deploy data discovery and management capability on user platforms to aid users in managing their sensitive data. (Team 5)</p> <p><i>Deferred due to lack of resources impacted by state budget impasse.</i></p>	07/01/15, 06/30/18	0% 100% identification of high-risk users of sensitive information in UA	0%	As of 07/24/17
<p>6.6.2 Implement server compartmentalization plan to prevent access to sensitive/trusted servers from untrusted platforms and untrusted sources, e.g. secure file servers. (Team 5)</p> <p><i>We will consider implementing this using internet proxy servers. Action will depend on funding.</i></p>	07/01/15, 06/30/18	33% implementation complete	0%	As of 07/24/17
<p>6.6.3 Implement secure Administrative IT desktops environment to mechanically separate inherently risk prone activities from trusted system access. (Team 5)</p> <p><i>We're working on CIS benchmark for workstations. We started pushing configurations based on benchmark to high risk employees in Decision Support</i></p>	07/01/15, 06/30/18	67% Implementation complete	67%	As of 06/28/17
<p>6.6.4 Formally refresh data classification by system, application, database, and/or user. Also serves to provide input to initiatives 6.5.2 and 6.5.3 (Team 5)</p> <p><i>SCISM is in progress.</i></p>	07/01/15, 06/30/18	33% 100% data refreshed	67%	As of 06/28/17
<p>6.6.5 Obfuscate and remove highly sensitive production data from non-production systems. Document, quantify, and communicate business reasons where practices require such storage. (Team 5)</p> <p><i>We are evaluating Oracle technologies for obfuscating and/or masking.</i></p>	07/01/15, 06/30/18	50% 100% highly sensitive production data removed from non-production systems	50%	As of 07/24/17
<p>6.6.6 Expire Sensitive Data from Systems by identifying useful lifecycle for sensitive record attributes and obfuscate or remove attributes or entire records when they are no longer required per business requirements. (Team 5)</p> <p><i>We had an informal discussion with EAC, and will have a more formal discussion as a next step. Need to document data classifications for possible standardization of lifecycle processes.</i></p>	07/01/15, 06/30/18	33% Sensitive data expired from systems when they are no longer required	10%	As of 07/24/17
<p>6.6.7 Improve record retention and data destruction/archiving practices by coordinating with RIMS to define and adopt base document management practices within AITS. (Team 5)</p> <p><i>RIMS has implemented additional policies for email retention. The next step will be to inquire about file shares.</i></p>	07/01/15, 06/30/18	80% 100% improvement of record retention	80%	As of 06/28/17
<p>6.6.8 Enhance encryption practices for data at rest and in transit by enabling encryption for all systems to transmit or store highly sensitive information or document exceptions, costs, and potential timelines for later implementation. (Team 5)</p> <p><i>Production database instances have been encrypted at rest. Decision Support databases will be encrypted next.</i></p>	07/01/15, 06/30/18	85% 100% encryption practices enhancement	90%	As of 07/24/17

6.7 Detect or attempt to actively exploit vulnerabilities of infrastructure computing systems. (Team 5) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>6.7.1 Enhance vulnerability scan remediation process by continuing to refine, perform, operationalize, and broaden risk reduction practices based for Nessus and AppScan vulnerability assessments. (Team 5)</p>	07/01/15, 06/30/18	75% 100% vulnerability scan remediation	85%	As of 06/28/17

Not Started
 Deferred
 On Target
 Off Target
 Waiting on Someone
 Critical
 Achieved

Nessus has been replaced by Qualys. Our remediation efforts are occurring regularly. AWS scanning being researched. Nessus license fee has provided a cost avoidance.

process enhancement

6.7.2 Expand penetration testing capability by exploring partnerships with other groups and vendors to perform testing. Utilize resulting data as input to further risk reduction proposals. (Team 5)

07/01/15,
06/30/18

50%
100% expansion of penetration testing capability

33%



As of 06/28/17

Next steps for this initiative will be to discuss this with the security working group (SWG) in calendar year 2017.

6.7.3 Perform anti-denial of service response plan and simulation exercise by confirming that ISPs are ready and prepared to interface with AITS in case of denial of service attacks upon enterprise system services. (Team 5)

07/01/15,
06/30/18

0%
Anti-denial of service response plan completes

0%



As of 06/28/17

Technology Services has done work on this and we are investigating their results.

7 Infrastructure

7.1 Provide infrastructure and facilities in order to deliver highly available and redundant enterprise level class systems. (Team 3) (06/30/18)



Comments on Status: Research and testing alternatives for Banner hardware is continuing. We are also exploring high availability through cloud services.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>7.1.1 Understand and strategize replacement of the M9000 enterprise hardware in 2015 - 2019. (Team 3)</p> <p>The M9000 was taken out of production and replaced with T7 servers in April 2017.</p>	07/01/15, 06/30/18	75% 100% Plan in place for M9000 replacement.	100%	As of 07/06/17
<p>7.1.2 Improve engagement with the Enterprise Architecture Committee (EAC) and integrate with AITS to expose the value of EAC. (Team 3)</p> <p>Discussions are underway how to best store and communicate EAC documents and outcomes.</p>	07/01/15, 06/30/18	25% 100% Storage and communication of EAC documents that can be easily accessed.	25%	As of 07/06/17
<p>7.1.3 Continue to provide high-quality data center services by identifying and replacing infrastructure and facility components that are nearing end-of-life or can provide greater capacity, stability, and security through newer or better technologies. (Team 3)</p> <p>We are putting together proposals for RRB and HAB to be part of the campus shared services. Key infrastructure components have been identified for replacement over the next 5 years. Some components such as AC units have been replaced along with upgrades of disk infrastructure. Monitoring has been restructured and built. Only critical pieces of equipment are being replaced until the discussions about the realignment are complete.</p>	07/01/15, 06/30/18	45% 100% Plan in place to replace infrastructure and facility components.	45%	As of 07/06/17
<p>7.1.4 Provide enterprise-class Database Administration and Hosting services. Departments that currently host their own Oracle or SQL Server databases could leverage enterprise class servers, storage area network (SAN) and highly experienced DBA resources thus freeing up resources on their end for their own initiatives. By utilizing standardized processes across all of our clients we are able to support a large number of databases with a small number of DBA staff. AITS can provide Development, Test, Quality Assurance (QA), Production and Business Continuance (BCP) database environments with 24x365 emergency on-call DBA support. Other notable services include backups, point in time restoration of databases (if needed), cloning of databases to non-production environments, an auditable production change control process, monitoring, and upgrades and patching of the database software. (Team 2)</p> <p>Discussions with the Grad College to host their SQL Server database and with the Office of Undergraduate Admissions and LAS in Urbana to host the entirety of each of their SQL environments have dissolved, primarily due to pricing. Due to reduced resources, we are now creating a joint project team with Tech Services to look at increasing efficiency.</p>	07/01/15, 06/30/18	2 Signed Service Level Agreements for DBA services. Goal of 2 new clients per year.	2	As of 07/06/17
<p>7.1.5 Implement the Identity and Access Management Project. The goal of this project is to implement an IAM solution to address the University of Illinois need to manage Identity and Access issues. Components of the implementation will include: Single sign-on, Provisioning, Authorizations,</p>	07/01/15, 06/30/18	70% 100% Implementation of	70%	As of 07/06/17

Affiliation, Business Intelligence, Authentication, and Federation. (Team 3)

IAM.

IAM one-id portion of the project has been implemented for all three campuses. Affiliations service for IAM is being designed currently. Duo implementation has been completed on multiple HR systems including Nessie and will be implemented for Banner systems this Fall. Duo will also be implemented this summer for HR Frontend and new HIPPA servers being built.

7.2 Identify and implement new technologies and products to enable AITS to bring state of the art services to our clients. (Team 3) (06/30/18)

Comments on Status: Amazon Web Services are being explored. We have expanded our web conference hosting abilities. We have expanded the abilities of Tableau to be integrated with existing websites. Our security is being enhanced by the implementation of Duo a multifactor authentication product. We have also re-platformed Banner to the latest Solaris technology offered from Oracle.



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>7.2.1 Establish a Kickstarter-like method as a way for people to submit ideas for further planning and funding. (Team 3)</p> <p><i>We are leading an effort to investigate options and possible processes for a kickstarter-like method.</i></p>	07/01/15, 06/30/18	15% 100% Kickstarter method established	15%	As of 07/24/17
<p>7.2.2 Invest in and implement a test-bed or environment that can be used for proof of concepts. (Team 3)</p> <p><i>We are considering having Standard and On Demand environments that would be able to be requested for test-beds. AWS initiative has allowed us to explore a number of different products and environments.</i></p>	07/01/15, 06/30/18	25% 100% Test-Bed environment and process available for proof of concepts	25%	As of 07/06/17
<p>7.2.3 Investigate cloud infrastructure services for short-term proof of concept initiatives. (Team 3)</p> <p><i>Amazon web services have been purchased. A testing strategy has been developed and an initial strategy is underway. We will explore options for using the Amazon cloud for short-term proof of concept initiatives. Google and Microsoft Azure will soon be available. We have also looked at Oracle Cloud as a potential solution which is available to us at this time. Full scale testing is underway. Infrastructure has been implemented that allows UI networks to communicate directly with AWS networks.</i></p>	07/01/15, 06/30/18	85% 100% Cloud infrastructure available for short-term proof of concept initiatives	85%	As of 07/06/17
<p>7.2.4 Develop strategic partnerships with university organizations to remove barriers to implement new technologies. (Team 3)</p> <p><i>AITs is actively participating in the IT Power Plants and Data Center Shared Services. AITS continues to work with UIUC on ITPP initiatives and has members on the teams. The IT realignment has allowed AITS to become partners with campus IT units to provide a greater scale of services.</i></p>	07/01/15, 06/30/18	40% 100% Partnerships achieved with university organizations allowing for implementation of new technologies.	40%	As of 07/06/17

7.3 Leverage AITS enterprise services to support campus systems that have expanded from localized edge and campus solutions to university solutions. (Team 3) (06/30/18)

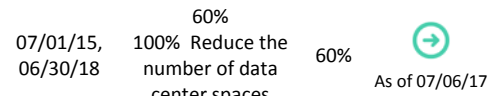
Comments on Status: We are discussing a variety of hosting solutions with different departments across the campuses. AITS continues to grow in shared services offerings that benefit the edge units.



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>7.3.1 Migrate support of applications such as Box from campus units to existing AITS departments using existing models and infrastructure to achieve a 20 – 40% support cost reduction. (Team 3)</p> <p><i>We provided proposals to consolidate Box support and we are also discussing SCCM support at an enterprise level. AITS will continue to provide SCCM infrastructure for the ITPP campus solution. SitePublish was also chosen as an ITPP solution for WCMS. AITS continues to play a greater role in providing SharePoint, Knowledge Base and SDM to the entire University.</i></p>	07/01/15, 06/30/18	40% 100% 20-40% cost reduction by migrating support of applications to AITS departments	40%	As of 07/06/17

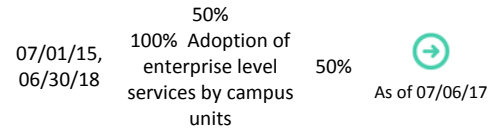
7.3.2 Leverage AITS data center space to provide high availability server location services to campus departments and support initiatives such as Data Center Shared Services ultimately reducing the number of data center spaces across the university. (Team 3)

AITs is actively engaged in the operational and executive level for the Data Shared Services. AITS continues to offer data center space through DCSS and other campus clients. College of Engineering is adding equipment through a partnership with IDOT into the RRB and HAB data centers. The UIC campus computing cluster is having an expansion planned for RRB as well.



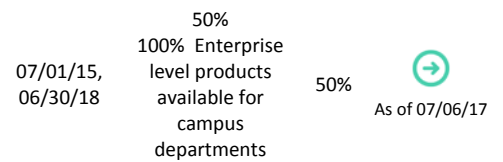
7.3.3 Offer enterprise level services such as video conferencing to campus units which could not utilize these services without the support of AITS and the cost savings achieved through economies of scale of an enterprise service. (Team 3)

ITS continues to expand video conferencing services. We have implemented services at LER in Urbana. AITS has expanded video conferencing services to a number of departments. Services such as media streaming and storing have also been expanded and offered to university departments. Bomgar and Knowledge Base use continue to grow quickly.



7.3.4 Provide access to campus departments to enterprise level products such as Service Desk Manager, CMDB, Bomgar, Knowledge Base, etc. that can bring enterprise class products to departments which provides both cost savings as well as improved end-user experience through consistent use of service management products. (Team 3)

New groups continue to start using the Service Desk Manager tool including the consolidation of Technology Services departments standardizing on this tool. Groups have expanded the use of SDM and incorporated new features and functionality of the product. The Knowledge Base has seen a steady increase in the number of active documents and with new departments using KB. Presentations of the CMDB have been given to nine departments as they explore how to incorporate the tool into their environment.



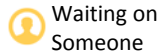
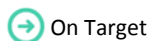
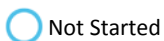
INSTITUTIONAL DATA AND INFORMATION AREAS & GOALS

8 Institutional Data and Information

8.1 Make the Data Warehouse environment a more comprehensive source of administrative data by extending it to include Local and Institutional Data. (Team 6) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>8.1.1 Establish policies and procedures for uploading local data, and promote this service to appropriate customers. (Team 6)</p> <p><i>We are continuing a review of a procedure document used in the past for dashboard data.</i></p>	07/01/16, 06/30/18	0% 100% complete policies and procedures for Local and Institutional data.	20%	As of 07/24/17
<p>8.1.2 Continue to extend the Data Warehouse environment by including data from at-least 10 other enterprise systems (via ITPC projects). (Team 6)</p> <p><i>We are continuing to work with data providers to develop proposals and projects to source additional data.</i></p>	07/01/16, 06/30/18	1 10 enterprise systems migrated to the data warehouse by way of ITPC projects.	1	As of 07/24/17
<p>8.1.3 Complete the Institutional Data Collections project and work with partners to identify additional data sets to publish, using Institutional Standard Answers as the driver where appropriate. (Team 6)</p> <p><i>We have identified additional data that can be made available through My-UI Financials, Account Receivables and Enrollment data sets. We are working on defining requirements and sourcing these data. We have had an initial discussion around making this data available and will continue to follow up with these data stewards.</i></p>	07/01/16, 06/30/18	0% 100% completion of the Institutional Data Collections project.	20%	As of 07/24/17



8.2 Improve the ease of use, understand-ability, and appropriate use of enterprise data by updating the Data Warehouse metadata. (Team 6) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>8.2.1 Improve documentation and metadata for Standard Reports. (Team 6)</p> <p><i>The existing catalog did not include all existing standard reports, so we are utilizing the Business Objects inventory tool and reporting on ViewDirect to build a comprehensive query of existing standard reports.</i></p>	01/01/16, 06/30/18	0% 100% complete existing documentation has been reviewed with a new revision number.	15%	As of 07/24/17
<p>8.2.2 Determine approach for helping information consumers and producers identify the best way to get data. (Team 6)</p> <p><i>The Universe Mapping Document has been updated and is available on the AITS – Decision Support website at https://www.aitis.uillinois.edu/services/reports_and_data/about_data/metadata/metadata_for_business_objects_users/universe_information/ The document provides a functional description for each object in each Universe.</i></p>	07/01/15, 06/30/18	66% 100% complete	66%	As of 07/24/17

8.3 Enable shared Business Intelligence (BI) capability for the University community. (Team 6) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>8.3.1 Identify needs and capability for shared BI functionality. (Team 6)</p> <p><i>When thinking about how to help clients use the existing tools in an easier manner, the item that stands out most was how to share the content they make in EDDIE with others. Currently the content is saved locally to their computer or network share and is only available to them. Additionally clients seem to have trouble installing the desktop Webi client. Enabling them to share their content directly on EDDIE would resolve this issue. Clients could develop the report and save it on a shared folder accessible by their unit (department, college, campus, etc.) Each shared folder would have two security groups. "Publishers" will be able to add content to a shared folder in Business Objects. "Viewers" will be able to see the content. Clients would still have view access to the centrally managed folders, but now can share content among a smaller group themselves.</i></p>	07/01/15, 01/01/17	100% 100%	100%	As of 07/21/17
<p>8.3.2 Provide training for teams and users to take advantage of shared BI functionality. (Team 6)</p> <p><i>Haven't started yet. We are looking to include this with a Business Objects upgrade that will happen in Spring 2018.</i></p>	01/01/17, 06/30/18	0 100% complete training services for Self-Service BI.	0	As of 07/24/17
<p>8.3.3 Pilot new features of shared BI allowing users to build reports, dashboards and data visualizations and then share them with collaborators in a BI environment. (Team 6)</p> <p><i>We have piloted shared folders in the EDDIE environment with one unit and learned lessons on how to setup the folder and permissions appropriately. We are planning to try our process with another unit, before rolling out the functionality for all users.</i></p>	04/01/16, 06/30/18	50% 100% complete report of pilot findings with a service recommendation.	50%	As of 07/24/17

8.4 Perform customer segment analysis to provide targeted Business Intelligence (BI) services. (Team 6) (06/30/18)



Comments on Status: Continuing work on this.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>8.4.1 Research and analyze customer segmentation on usage of our BI services. (Team 6)</p> <p>We implemented a new SAP Business Objects inventory tool, which sources usage data as well. The tool has a set of pre-delivered reports that we are investigating for accuracy and completeness. We will utilize these if possible to have a more standardized and supported analysis solution.</p>	04/01/16, 06/30/18	100% 100% complete summary of findings on usage of existing BI services.	75%	 As of 07/24/17
<p>8.4.2 Define customer segmentation of usage categories that will provide enhanced BI services. (Team 6)</p> <p>This is still in progress</p>	07/01/16, 06/30/18	10% 100% complete defined usage categories for BI services.	0%	 As of 07/24/17
<p>8.4.3 Identify strategy to retain existing customer segments and service offering groupings. (Team 6)</p> <p>This is still in progress</p>	07/01/16, 06/30/18	10% 100% complete strategy of a plan to retain existing customers and offer new services.	0%	 As of 07/24/17
<p>8.4.4 Identify strategy to market and expand customer segments by service offering(s). (Team 6)</p> <p>This is still in progress</p>	07/01/16, 06/30/18	10% 100% complete strategy plan for new customer service offerings.	0%	 As of 07/24/17
<p>8.4.5 Implement and manage an ongoing customer service model to support enhanced BI service. (Team 6)</p> <p>This is dependent on 8.4.4 which is still in progress.</p>	07/01/16, 06/30/18	10% 100% complete implementation of an enhanced BI service model.	0%	 As of 07/24/17

8.5 Perform universe (semantic layer with business representation of data in Business Objects) maintenance on existing set of Business Objects universes to simplify and improve user experience. (Team 6) (06/30/18)



Comments on Status: No further progress has been made.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>8.5.1 Identify scope of effort, including universes impacted, and changes needed to simplify user experience with Business Objects. (Team 6)</p> <p>The team is evaluating a Student BO universe as its first pilot to devise their final process for improvements. No further progress has been made yet.</p>	07/01/15, 06/30/17	10% 100% complete proposal for long term process.	0%	 As of 07/24/17
<p>8.5.2 Define, prioritize, and develop new Business Objects universe specifications for long-term maintenance. (Team 6)</p> <p>Part of initiative 8.5.1: The team is continuing to evaluate a Student BO universe as its first pilot to devise their final process for improvements. Outcomes from that evaluation will determine next for this initiative. No progress has been made on initiative 8.5.1 to further this initiative.</p>	07/01/15, 06/30/18	50% 100% complete specifications for Business Objects universe.	33%	 As of 07/24/17
<p>8.5.3 Implement technical and process improvements to Business Object universes for a better user experience. (Team 6)</p>	07/01/16, 06/30/18	10% 100% complete	0%	

This is dependent on 8.5.2 and no further progress has been made on that initiative yet.

proposal for technical improvements.

As of 07/24/17

8.6 Update Development Process for Business Intelligence (BI) and Data Warehousing (DW) solutions. (Team 6) (06/30/18)



Comments on Status: A new methodology has been put in place to allow a much smoother transition from requirements gathering to the design process.

INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
8.6.2 Determine approach for updating the BI and DW development methodology to best meet stakeholder needs. (Team 6) <i>A new methodology has been put in place to allow a much smoother transition from requirements gathering to the design process. It adds a two-step process including a visual analysis of the requirements and data model plus a collaborative approach to identifying any data issues and anomalies prior to design work beginning, reducing the risk of unforeseen issues arising during the design phase.</i>	07/01/15, 06/30/18	50% 100% complete approved proposal for development methodology.	100%	As of 07/18/17



8.7 Develop a service model for Business Intelligence solutions. (Team 6) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
8.7.1 Complete an internal inventory current dashboard tools and create capabilities matrix. (Team 6) <i>A capabilities matrix document was drafted.</i>	07/01/15, 06/30/18	100% 100% complete - Completion of inventory for dashboard tools.	100%	As of 07/24/17
8.7.2 Create training documentation around dashboards and visualization to support current and future users. (Team 6) <i>This has been deferred.</i>	07/01/16, 06/30/18	0% 100% complete creation and posting of training documentation.	0%	As of 07/24/17
8.7.3 Develop service model documentation for Business Intelligence solutions. (Team 6) <i>Additional updates to the document have not been completed yet.</i>	07/01/15, 06/30/18	75% 100% complete service model proposal for dashboards	75%	As of 07/24/17
8.7.4 Deploy service model for dashboards and visualizations. (Team 6) <i>This has been deferred.</i>	07/01/15, 06/30/18	10% 100% complete implementation of service model.	10%	As of 07/21/17

8.8 Improve Data Mining & Predictive Analytics skills to build team capabilities for future work supporting university processes in this area. (Team 6) (06/30/18)



INITIATIVES	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>8.8.1 Study and assess state of the art practice and technology for Data Mining and Predictive Analytics. (Team 6)</p> <p><i>We have met with vendors and looked at a few opens source tools to understand what sort of skills are needed. We now need to bring in training for the team.</i></p>	<p>07/01/15, 06/30/18</p>	<p>100% 100% complete summary report of assessment for data mining and predictive analytics.</p>	<p>100%</p>	<p> As of 07/18/17</p>
<p>8.8.2 Build team knowledge in data mining and predictive analytics techniques through professional development and projects. (Team 6)</p> <p><i>We will decide based on funding available which training can be provided to the team.</i></p>	<p>01/01/17, 06/30/18</p>	<p>10% 100% complete internal professional development plan for data mining and predictive analytics.</p>	<p>10%</p>	<p> As of 07/24/17</p>