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# AITs Strategic Plan Wrap Up Report

FY19-FY21



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# FY19-21 AITS STRATEGIC PLAN WRAP UP REPORT

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## BACKGROUND

This document is the final status of AITS's strategic initiatives and goals for FY21 as well as this iteration of the AITS Strategic Plan FY19-21.

The AITS strategic initiatives were created through discussions with our customers, a review of higher education and IT trends and forecasts, as well as the University of Illinois System and Universities' strategic plans. Some of the goals represented stretch goals that were pursued as resources were available and other goals were satisfied. Each goal and initiative had 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. Overall, the AITS Strategic Plan outlines the information technology strategies and initiatives and was designed to be a three-year IT plan that evolves with collaborative input alongside other strategic plans throughout the University of Illinois System.

## STRUCTURE OF THE AITS STRATEGIC PLAN

The AITS Strategic Plan is organized into the following levels:

1. Strategic Initiative (We have 15 initiatives)
  - 1.1. Supporting goals (3-5 goals per initiative)
    - 1.1.1. Supporting projects or activities (between 3-10 per goal)
      - 1.1.1.1. Tasks (variable—determined by manager and tracking preferences)
        - 1.1.1.1.1. Subtasks

Each Strategic Initiative is mapped to one of four perspectives that define our mission and role for the University of Illinois System:

- Improve operational efficiencies and increase administrative productivity
- Save time and improve ease of use for faculty, staff, and students
- Maintain reliable enterprise-class services
- Remain prepared and responsive to UI System needs

## METRICS AND KPIS

All supporting goals, projects/activities, tasks, and subtasks have a metric. Some of the metrics have been designated as KPIs. These KPIs are designed to drive and communicate progress against our overarching initiatives. In most, but not all cases, these KPIs are at the supporting goal level. Metrics that are not KPIs tend to be percent complete metrics. In some cases, KPI's were not identified or were determined to be no longer relevant.

## STRATEGIC DIRECTIONS



AITS uses the following 5 strategic directions as guides to focus our efforts in supporting University's mission and our responsibilities as an organization. These strategic directions align with our mission and vision and focus our efforts on fulfilling these.

- 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.

# MISSION

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 our information technology resources and knowledge. We continually measure and evaluate our services in order to optimize them for the University community.

# VISION

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.

# FY21 YEAR-END STATUS

Perspective	Strategic Initiative	Supporting goals achieved or on target or KPI met	Supporting goals off target	Supporting goals not started or deferred	Subtasks achieved or on target	Subtasks off target	Subtasks not started or deferred
<b>Improve operational efficiencies and increase administrative productivity</b>	1.Extend the life of our current ERP systems by implementing a set of high impact improvements	6	1	1	3	1	
	2.Save time for the system by providing a tool to automate business processes	5					
	3. Improve the system's operational efficiency by systematically identifying and implementing business process improvements	2		1	17		
	4.Improve the AITS budget tracking process	2	2			5	3
<b>Save time and improve ease of use for faculty, staff, and students</b>	5.Engage our users and increase productivity for the System by accelerating efforts in three areas: accessibility, user experience, and availability of near real-time data	2			12	5	2
	6.Improve first contact resolution with advanced service desk support	6					
	7.Complete Research Administration and IAM/2FA projects	3			16	1	1

Perspective	Strategic Initiative	Supporting goals achieved or on target or KPI met	Supporting goals off target	Supporting goals not started or deferred	Subtasks achieved or on target	Subtasks off target	Subtasks not started or deferred
	8.Continue to increase the quality and speed of solutions by developing and improving upon our methodologies and processes	1		2	1		5
<b>Maintain reliable enterprise-class services</b>	9.Maintain enterprise systems integrity, reduce risk of system failures, and improve disaster recovery processes	5			11	1	1
	10.Increase our agility and responsiveness to System needs by leveraging cloud technologies	1	2		18	3	3
	11.Continue to protect system office computing infrastructure and user platforms	3					
<b>Remain prepared and responsive to UI System needs</b>	12.Research and development to ensure our readiness to quickly respond to new technologies and System needs	5			24		4
	13.Support the development of a system wide strength in data analytics	2	3		21	4	5
	14.Grow and retain a talented workforce that's keeping up with industry changes and is committed to supporting the System's strategic priorities	3	1				
	15.Continue to be an engaged partner across the System	4		1			

# AITs STRATEGIC PLAN FOR FY19 - FY21 - PROGRESS DETAIL

## IMPROVE OPERATIONAL EFFICIENCIES AND INCREASE ADMINISTRATIVE PRODUCTIVITY STRATEGIC INITIATIVES & SUPPORTING GOALS

### 1 Extend the life of our current ERP systems by implementing a set of high impact improvements

**1.1 Travel and expense management system improvements (TAM) (06/30/21)**      **Measure:** Percent complete      75%      **On Target**  
**Target:** 75%

*Comments:*  
 • The team has completed the pilot with the new product. Final configuration, integrations, and roll out to the community of more than 25,000 individuals will occur in Winter of 2021-2022. (Stephanie Dable, 11/05/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
1.1.1 Data analysis, future state, and quick wins implementation effort (TAM)  <i>Comments:</i> • 8/21/2019: Final report delivered. Recommendations presented and distributed to the appropriate mechanism for implementation. (Stephanie Dable, 09/03/20)	07/01/18, 07/31/19	100% Percent complete	100%	<b>Achieved</b> As of 08/22/19
1.1.2 Source2Pay TEM project (TAM)  <i>Comments:</i> • The team has completed the pilot with the new product. Final configuration, integrations, and roll out to the community of more than 25,000 individuals will occur in Winter of 2021-2022. (Stephanie Dable, 11/05/21)	07/01/18, 06/30/22	50% Percent complete	50%	<b>On Target</b> As of 10/28/21

**1.2 Applicant tracking system improvements (TAM) (06/30/21)**      **Measure:** Percent complete      50%      **Off Target**  
**Target:** 50%

*Comments:*  
 • This project is off target due to client delays. The Urbana, Springfield, and System Office HR groups have determined that they do not have enough commonalities between their processes to implement a common system. This project will implement three separate instances of the system. A new schedule will be provided, and this project will be rebaselined. (Stephanie Dable, 11/05/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
1.2.1 Vendor decision (TAM)  <i>Comments:</i> • Vendor selection complete.	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 10/06/21
1.2.2 Applicant tracking system project (TAM)  <i>Comments:</i> • This project is off target due to client delays. The Urbana, Springfield, and System Office HR groups have determined that they do not have enough commonalities between their processes to implement a	07/01/18, 06/30/22	0% Percent complete	25%	<b>Off Target</b> As of 11/05/21

common system. This project will implement three separate instances of the system. A new schedule is in place and the project has been rebaselined. Scheduled deployment is Summer 2022.

### 1.3 Security application system improvements (TAM) (06/30/21)

Comments:

- Initial planning for this project has begun. (Stephanie Dable, 11/05/21)
- This project was delayed due to resources being consumed by higher priority pandemic related activities. It is expected to begin in FY22. (Cynthia Cobb, 09/27/21)
- 11/16/2020: While this project remains a high priority, resource availability will determine when this project begins. (Stephanie Dable, 11/16/20)
- 7/6/2020: The team made the recommendation to move forward with a hybrid approach using the existing midPoint system and building the necessary interfaces to midPoint for each group (USCs, end users, and managers.) An implementation template was approved, and the project is currently scheduled to kick off in October 2020, pending resource availability.

**Measure:** Increase speed of security process by 20% after 3 months of new workflow tool.

**Target:**

On Target

### 1.4 iBuy system improvements (TAM) (06/30/21)

Comments:

- iBuy system improvements were prioritized and implemented as part of the early work of S2P. This work is complete as scoped in the S2P effort. (Cynthia Cobb, 10/06/21)

**Measure:** Percent complete 100%

**Target:** 100%

Achieved

### 1.5 Annual ERP evaluation (TAM) (06/30/21)

Comments:

- In the past three months, we reviewed and updated our ERP evaluation. (Stephanie Dable, 11/05/21)

**Measure:** Percent complete 100%

**Target:** 100%

Achieved

### 1.6 Contract manager system improvements (TAM) (06/30/21)

Comments:

- New processes and program leadership have resulted in the new timeline and scope being met for Contracts plus. As of 9/27/2021, the project is in pilot and plans for the first roll out are underway for November. As the new timeline is being met and the first roll out is imminent, this is being marked as on target. (Stephanie Dable, 10/28/21)

**Measure:** Percent complete 80%

**Target:** 80%

On Target

### 1.7 Procurement portal creation (TAM) (06/30/21)

Comments:

- This phase of S2P will not be started until after the other S2P program elements are complete. (Cynthia Cobb, 09/27/21)

**Measure:** Percent complete

**Target:** Program team determined this would be complete after all other S2P elements are done.

Not Started

### 1.8 Capital contracting and procurement process improvements (TAM) (06/30/21)

Comments:

- This project has been reintegrated into the S2P program and is in progress. There is an aggressive timeline in place to recreate contract templates to migrate off of the current Upside tool. Currently the project is on target. Anticipated completion date is in FY22. (Cynthia Cobb, 09/27/21)

**Measure:** Percent complete

**Target:** Schedule determined by client and other S2P work

On Target

## 2 Save time for the system by providing a tool to automate business processes

**2.1 Acquire and implement iPMS tool (TAM) (06/30/19)**

Comments:

- 6/24/2019: K2 has been acquired and implemented in production, as of February 2019. (Stephanie Dable, 09/03/20)

Measure: Percent complete

100%

**Achieved**

Target: 100%

**2.2 Create initial library of reusable workflows and integrations (TAM) (06/30/20)**

Comments:

- 11/27/21: We have approximately 65 active workflows and integrations. They include UIC College of Education, UIC Registrar, Banner, Person, Student, Shield, and TDX.

Measure: Number of reusable workflows and integrations for K2

65

**Achieved**

Target: 10

**2.3 Create a center of excellence (TAM) (06/30/21)**

Comments:

- K2 business process automation effort is part of AITS' larger Intelligent Process Automation group that uses different technologies to help automate business processes for our clients. Our EOY 2020 KPI was 15 K2 processes in production. This was not met due to inadequate resources and some accessibility requirements. In FY21, the K2 team was provided with resources to create a virtual Intelligent Process Automation team. As a result, there are now 30 K2 processes in production. (Cynthia Cobb, 10/06/21)

Measure: Number of processes leveraging K2

23

**Achieved**

Target: 15

**2.4 Establish a service framework (TAM) (06/30/20)**

Comments:

- Training program and materials are complete. We are no longer encouraging K2 citizen developers, as they require more assistance than we can spare. As such these materials are not being actively promoted. (Cynthia Cobb, 11/05/21)

Measure: Percent complete

100%

**Achieved**

Target: 100%

**2.5 Prove solution and service processes with approximately 15 pilots (TAM) (06/30/21)**

Comments:

- K2 business process automation effort is part of AITS' larger Intelligent Process Automation group that uses different technologies to help automate business processes for our clients. Our EOY 2020 KPI was to hit improvement goals for 10 out of our 15 projects. Due to resource and accessibility issues, we did not implement 15 projects in FY20. However, by the end of 2021, we deployed 23 K2 projects. Our estimates of labor savings for these projects are approximately 1,700 hours. In FY22, we will revisit these, and capture estimated actual savings. We have high confidence, however, that we have met or exceeded this goal. (Cynthia Cobb, 10/06/21)

Measure: Number of K2 pilots hitting defined improvement goals

23

**Achieved**

Target: 10

**3 Improve the system's operational efficiency by systematically identifying and implementing business process improvements**

**3.1 Define and implement top-down BPI set of processes to include CFO, ITPC, Source2Pay, and customer requests (PPMO) (06/30/21)**

Comments:

- This was completed in FY2019. (Cynthia Cobb, 12/03/20)

Measure: Percent complete

100%

**Achieved**

Target: 100%

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
3.1.1 Capacity building and skills training and coaching (PPMO)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b>

Comments:

- This goal was completed in FY2019. (Cynthia Cobb, 12/03/20)

As of 12/03/20

3.1.2 Preparation and planning (PPMO)

07/01/18,  
06/30/20

100%  
Percent complete

100%

**Achieved**

As of 01/16/20

Comments:

- 1/16/2020: PAPP is in progress and BPI and PMO are regularly meeting with PAPP manager to identify upcoming projects and BPI needs prior to project proposal submittal or technology selection. BPI is put in front of all ITPC projects that need it.

3.1.3 Pilot and methodology revisions (PPMO)

07/01/19,  
06/30/20

100%  
Percent complete

100%

**Achieved**

As of 11/06/21

Comments:

- BPI methodology changes continued past the FY20 end date to accommodate IPA and to increase the speed at which we complete our analysis. (Cynthia Cobb, 11/06/21)

3.1.3.1 Ensure new products and processes have built-in methods for ongoing process measurement (Amy Glenn)

01/01/20,  
06/30/21

100%  
Percent of new solutions  
with built in process  
measurements

100%

**Achieved**

As of 10/11/21

Comments:

- The method for recording initial goals and actuals has been in place for 6 months. A dashboard showing anticipated efficiencies and a plan for following up to gather actuals is in place. (Cynthia Cobb, 10/11/21)

3.1.3.2 Implement technical check-ins at end of improvements (Amy Glenn)

07/01/19,  
06/30/21

100%  
Percent of BPI projects that  
have technical check ins

100%

**Achieved**

As of 12/03/20

Comments:

- We have eliminated the need for technical check ins at the end of a BPI project as we've revised our intake processes to involve technical folks from the outset. This will ensure that we are designing the right solution for the right problem. (Cynthia Cobb, 12/03/20)

3.1.3.3 Define and implement technical hand off process for BPI work (Amy Glenn)

07/01/19,  
06/30/20

100%  
Percent complete

100%

**Achieved**

As of 11/06/21

Comments:

- BPI has been integrated into IPA, which includes a technical handoff and allows for BPI involvement throughout the implementation. This activity was completed in FY21. (Cynthia Cobb, 11/06/21)

**3.2 Business process improvements (PPMO) (06/30/20)**

Comments:

- In FY20 BPI completed 11 projects. These projects provided recommendations to the client. In FY21, BPI participated in 39 projects and worked closely with the new IPA technical implementation team. Technical solutions are handed off to the IPA technical implementation team. Non-technical solutions are provided to the client and the client determines what they wish to implement and implements them as they see fit. We do not believe our FY21 projects are ready to be measured, and our FY20 projects are dependent upon the client (Cynthia Cobb, 11/06/21)

**Measure:** Percent of BPI projects meeting predefined improvement goals

**Target:** 10%

FY21 work not ready to be measured

**Achieved**

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
3.2.1 TEM data analysis and future state improvements (PPMO)	07/01/18, 06/30/20	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 11/06/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>• The TEM system implementation project is underway. Until this project finishes, and we review to see what BPI recommendations were implemented, we cannot determine whether the original project goals were met. As this project did meet the scope of the engagement, we are marking this with a "1" to indicate the original scope and goals were met. (Cynthia Cobb, 11/06/21)</li> </ul>				



3.2.2 Central IT inventory control (PPMO)	07/01/18, 09/30/18	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal for this engagement was to create a common, documented process that could be shared by IT units across the system. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.3 Council on Teachers Education - student application process (PPMO)	07/01/18, 09/30/18	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>CTE wanted to streamline the entire application process and organization of student data. The goal was to improve the process overall by 10% or more in the areas of staff workflow timing, student timing, process satisfaction and ease of completing the process. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.4 Grants sub-recipient monitoring process (PPMO)	07/01/18, 12/31/18	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The sponsor wanted to revise the process so that risk assessments are completed before the grant award is issued (thereby eliminating risk exposure) and reduce staff hours spent following up. Also, they wanted to achieve a 10% reduction to 0% for incomplete or no-response risk assessments, achieve a 2% reduction to 0% of high-risk assessments and achieve a 50% reduction to 0% of audit findings regarding subrecipient monitoring. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.5 College of Medicine Pediatrics - faculty recruitment and onboarding (PPMO)	07/01/18, 03/31/19	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal of this project was to create standardization and increase staff and stakeholder understanding of the hiring process, improve the quality of communication among staff, specifically regarding the "search status" to internal stakeholders (defined above), and reduce overall processing time, thereby increasing hires for staffing gaps. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.6 College of Medicine Peoria - courier services (PPMO)	07/01/18, 06/30/19	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal of this project was to review the current courier Service process and define and implement an acceptable time frame to send and receive deliveries within the courier service. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.7 College of Education - HR appointment processing (PPMO)	07/01/18, 09/30/18	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal of this project was to determine if the Hiring/Appointment processes in the College of Education and College of Business are common enough that a "shared service" could be created which would serve both Colleges. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.8 Bruce Nesbitt African American Cultural Center- event planning (PPMO)	07/01/18, 09/30/18	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal of the project was to help the sponsor identify areas of improvement and streamline the process of the Food for the Soul event. Through this process, the sponsor would like to establish the metrics to determine success and apply continuous improvements as needed. (Cynthia Cobb, 09/03/20)</li> </ul>				
3.2.9 Beckman Institute - equipment inventory process (PPMO)	07/01/18, 03/31/19	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal for this project was to determine the best practice for the inventory process from procurement to surplus and implement a streamlined process. The streamlined process would include identifying the current process and eliminating any steps to help reduce lead time and establish a standard practice. An established measurement is to complete the Biennial Inventory within the acceptable timeframe set by the University of Illinois System Property Accounting department to comply with the State of Illinois, compliance with all inventory equipment, and completing the 30-day reconciliation of the inventory process when receiving inventory equipment. (Cynthia Cobb, 09/03/20)</li> </ul>				

3.2.10 College of Nursing - internal roles Kaizen (PPMO)	07/01/18, 03/31/19	1 Met goals (1) or didn't meet goals (0)	1	<b>Achieved</b> As of 05/29/19
<p>Comments:</p> <ul style="list-style-type: none"> <li>The goal of this project was to clarify the roles and responsibilities of the administrative team, clarify ownership of each function, standardize execution of workflows, establish consistent resources for answering questions, identify areas for cross-training and position the team to "do more with less." (Cynthia Cobb, 09/03/20)</li> </ul>				

3.2.11 FY 20 and 21 BPI work (PPMO)	07/01/19, 06/30/21	1 Met goals (1) or didn't meet goals (0) for each engagement	50 total	<b>Achieved</b> As of 11/06/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>In FY21 and FY20 the BPI team ran or participated in 50 engagements in support of IPA, ITPC, and our clients on the three campuses. In FY20, solutions were provided to the client, and they were responsible for taking the next steps. In FY21 technical solutions are handed off to the IPA technical implementation team. Non-technical solutions are provided to the client and the client determines what they wish to implement and implements them as they see fit. We do not believe our FY21 projects are ready to be measured, and our FY20 projects are dependent upon the client.</li> <li>FY20 and 21 work focused on IPA and some BPI engagements. To capture this work, I've created a goal to list the FY20 and 21 engagements. (Cynthia Cobb, 11/06/21)</li> </ul>				

<b>3.3 Improve data assessment capabilities within BPI team for CFO directed work (PPMO) (06/30/21)</b>		<b>Measure:</b> Number of successful CFO data analysis projects completed	1	<b>Deferred</b>
<p>Comments:</p> <ul style="list-style-type: none"> <li>BPI has a DMAIC process methodology and can leverage data analysis resources through Decision Support as needed. This goal should be withdrawn and replaced with a process automation learning goal, which has also already been achieved. (Cynthia Cobb, 12/03/20)</li> </ul>				
		<b>Target:</b> 4		

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
3.3.1 Identify skill gaps and develop plan to increase data analysis capabilities within BPI team (PPMO)	07/01/19, 06/30/20	100% Percent complete	10%	<b>Deferred</b> As of 02/12/20
<p>Comments:</p> <ul style="list-style-type: none"> <li>This goal was withdrawn as the group shifted focus to process automation. (Cynthia Cobb, 10/11/21)</li> </ul>				
3.3.2 Identify areas where BPI can leverage experts within AITS for data analysis assistance or tasks (PPMO)	07/01/19, 06/30/20	100% Percent complete	5%	<b>Deferred</b> As of 10/11/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>The BPI team has a good sense of who to contact for help with data analysis tasks. This goal was withdrawn as they shifted focus to IPA. (Cynthia Cobb, 10/11/21)</li> </ul>				
3.3.3 Create a data driven BPI methodology based on industry best practices and lessons learned from TEM work (PPMO)	07/01/19, 06/30/20	100% Percent complete	0%	<b>Deferred</b> As of 01/16/20
<p>Comments:</p> <ul style="list-style-type: none"> <li>This was removed as a goal as we shifted to IPA. (Cynthia Cobb, 10/11/21)</li> </ul>				

#### 4 Improve the AITS budget tracking process

<b>4.1 Establish a near-real time financial dashboard for ongoing tracking (AFM) (12/31/20)</b>	<b>Measure:</b> Percent complete	75%	<b>Off Target</b>
	<b>Target:</b> 100%		

Comments:

• This particular strategic goal for AFM was not met in FY21. With the retirement of a key financial position within ATIS, the completion of our AITS Financial Dashboard was put on hold until a replacement could be hired and transitioned into the role. This has since occurred with the hire of a new Business & Finance Coordinator, and meetings have now taken place with the DS team to continue the development process with the intent to finalize the dashboard. This is in progress with a new goal of completion in FY22. (Jenny Ehrnthaller, 10/14/21) (Cynthia Cobb, 11/03/21)

**4.2 Investigate and improve self-supporting fund management (AFM) (06/30/20)**

Comments:

• The new Monday.com board was implemented for SLA tracking use in Q3 of FY20. All SLA billing data was captured on the board and was also extracted to excel for record keeping at the conclusion of the fiscal year. This process is more efficient than the previous process and allows all users access to the information to update as needed. At the start of FY21, a new board (same template) was created for use and the new process will continue, which has improved our overall billing process. We have not seen a reduction in hours to manage this yet, but we are happy with the new process and may see a reduction this year. (Jenny Ehrnthaller, 11/06/21)

Measure: Reduction in hours required to manage self-supporting funds

0%

Off Target

Target: 50%

**4.3 Access and distribute knowledge of ABC process and data (AFM) (06/30/21)**

Comments:

• WTC completed the AITS ABC revamp project around the end of FY20. In the fall of FY21, WTC will continue working with AITS to train the AFM team on the process to extract data correctly to properly report costing, as well as incorporate the new process into how data is extracted and reported for future fiscal years (FY22 and beyond). AITS is considered one final potential engagement with WTC in the fall of FY22 to make sure the new process is reported correctly, and this makes up for the percentage split of this goal - 60% at the conclusion of FY20, 80% at the conclusion of FY21 and 100% at the conclusion of FY22. (Jenny Ehrnthaller, 11/17/20) (Cynthia Cobb, 11/03/21)

Measure: Percent complete

100%

Achieved

Target: 80%

**4.4 Simplify budgeting and tracking by merging the CIO and AITS organizations (AFM) (06/30/20)**

Comments:

• 01/29/2020 The CIO merge with AITS is complete. (Jenny Ehrnthaller, 09/03/20)

Measure: Percent complete

100%

Achieved

Target: 100%

**4.5 Implement asset management process improvements (AFM) (06/30/21)**

Comments:

• Asset management improvements have been moving forward and on target. AFM hired a new position for inventory oversight (Kat Mathews) in the Spring of 2020, and she has been training in this area and progressing in the position. At the start of FY21, AFM shifted gears to focus on Biennial Inventory, which is set to certify in January 2021, while continuing to make improvements on the overall asset management process when able. AFM is continuing to review process flows for all steps of the process and has defined the process for integrations with Desktop Support. We expect some additional work within asset management with the transfer of our inventory database from SDM to TeamDynamix, which will likely change some of our flows, but we plan to document these updates as needed. Since we've implemented these changes, we've gone from close to 100 missing assets to only 25. (Cynthia Cobb, 11/06/21)

Measure: Reduction in missing inventory items

75%

Achieved

Target: 50%

SAVE TIME AND IMPROVE EASE OF USE FOR FACULTY, STAFF, AND STUDENTS STRATEGIC INITIATIVES & SUPPORTING GOALS

5 Engage our users and increase productivity for the System by accelerating efforts in three areas: accessibility, user experience, and availability of near real-time data

5.1 Improve usability and reduce training needs for new or redesigned applications (ADS) (06/30/21)

Comments:

- The web application standards are available on the AITS website and are being followed for enterprise applications such as myAccessCenter, NetID Center, TeamDynamix customizations and Cornerstone customizations. Of these, 2 projects are ready to be measured and have shown very low service desk contacts. (Marla McKinney, 10/14/21)

Measure: Reduction in service desk contacts per total user base for applications that use new design standards

100%

Achieved

Target: 100%

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
5.1.1 Develop and promote standards for web applications (ADS)  Comments: • Most web development projects are using common web application standards to enhance the user experience. The Software Development Lifecycle (SDLC) modernization project have put steps in place to ensure User Experience and Design is a part of the overall development process. (Marla McKinney, 11/07/21)	07/01/18, 12/31/21	100% Increase in percent of applications using new design standards	100%	Achieved As of 10/14/21
5.1.1.1 Design/Build website for standards (Marla McKinney)  Comments: • The Design Standards for AITS Developed Enterprise Application is available on the AITS website. (Marla McKinney, 10/14/21)	07/01/19, 06/30/21	100% Percent complete	100%	Achieved As of 10/14/21
5.1.1.2 Provide a custom foundation framework for use by developers (Marla McKinney)  Comments: • This will not be a priority at this time. Other project priorities are taking priority. (Marla McKinney, 10/14/21)	02/01/21, 06/30/21	100% Percent complete		Deferred As of 10/14/21
5.1.1.3 Share and socialize (Marla McKinney)  Comments: • The standards are available on the AITS website and will be reviewed at the ITLC Administrative Applications Committee at the end of October. (Marla McKinney, 10/14/21)	02/01/21, 06/30/21	100% Percent complete	100%	Achieved As of 10/14/21
5.1.1.4 Provide Accessibility Web Standards (Marla McKinney)  Comments: • The standards are available on the AITS website. (Marla McKinney, 10/14/21)	07/01/18, 06/30/21	100% Web Accessibility Standards will be documented and a process for reviewing accessibility of Web Applications will be formalized	100%	Achieved As of 10/14/21

5.2 Expand access to near-real-time data for end users of integration services for students, faculty, and staff (ADS) (06/30/21)

Measure: Increase the number of integration partners by 10% annually

31

Achieved

Target: 30

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
5.2.1 Expand Event Stream Offerings (ADS)	07/01/18, 06/30/20	13 Count of Event Streams integrations	10	<b>Achieved</b> As of 11/17/20
5.2.1.1 Provide HR data security filtering (Marla McKinney)  <i>Comments:</i> • Status as of 4/25/2019: This is available in production. This provides support for granular filtering of HR-related event stream data, ensuring that access to data is limited to the approved organization owner(s). (Marla McKinney, 09/03/20)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 05/28/19
5.2.1.2 Provide Course add/drop data to support Blackboard (Marla McKinney)  <i>Comments:</i> • Status as of 6/26/2019: This integration is available in production. ATLAS has also expressed an interest and has been granted approval to consume this service. Benefit to University: data will be available to use in university Learning Management Systems. UIS has specifically requested this. (Marla McKinney, 10/14/21)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 10/14/21
5.2.1.3 Provide more timely data during the Admissions Application and Admissions Decision Cycle (Marla McKinney)  <i>Comments:</i> • As of August 1, 2019, the new event streams have been deployed to production environment. This integration will provide for more timely processing and delivery of data (to and from student-facing systems) during admissions cycles. (Marla McKinney, 09/03/20)	07/01/18, 08/30/19	100% Percent complete	100%	<b>Achieved</b> As of 09/03/19
5.2.1.4 Leverage event streams to maintain accurate bio-demo data for UIC faculty in the MyActivities solution (Elements system) (Marla McKinney)  <i>Comments:</i> • Status as of 5/26/2019: This is now available in production. (Marla McKinney, 09/03/20)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 07/10/19
5.2.1.5 Formalize architecture/integration oversight process (Marla McKinney)  <i>Comments:</i> • The Integration Architecture Group (IAG) has been formalized and is meeting bi-weekly. This is a subcommittee of the Enterprise Architecture Committee (EAC). (Marla McKinney, 09/03/20)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 04/25/19
5.2.1.6 Provide Finance organization accounting elements for Start MyResearch (Marla McKinney)  <i>Comments:</i> • This is now in production. Status as of 1/28/2020: We are slightly off target for this production release. The original goal was December 2019. The new production release timeframe is February. Start MyResearch is requesting this integration to be able to sync user/org data to improve upon the existing means of accessing this data (KualiConnector). (Marla McKinney, 09/03/20)	07/01/18, 02/28/20	100% Percent complete	100%	<b>Achieved</b> As of 03/03/20
5.2.2 Evaluate Ethos integration solutions (ADS)  <i>Comments:</i> • Evaluation of Ethos integration solution is complete. A document outlining approach and strategy for Ethos is available and reviewed with key stakeholders. (Marla McKinney, 09/03/20)	07/01/18, 06/30/20	100% Percent Complete	100%	<b>Achieved</b> As of 07/13/20
5.2.3 Evaluate API Gateway solutions to provide a common user experience to units that wish to build integrations (ADS)  <i>Comments:</i>	07/01/18, 12/31/19	100% Percent Complete	100%	<b>Achieved</b> As of 01/28/20

• 1/27/2019 - Azure has been selected as the API Gateway solution. Research findings have been documented and Final report is available. (Marla McKinney, 09/03/20)

5.2.4 API Gateway Implementation (ADS)	01/06/20, 06/30/21	100% Percent Complete	85	<b>Off Target</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Gateway is 100% Deployed in Production as a platform. We're moving most API/Web Services to the API Gateway. This effort continues. 50% have been moved. (Marla McKinney, 10/14/21)</li> </ul>				
5.2.4.1 Develop Naming Conventions (Should be Portable) (Marla McKinney)	01/06/20, 06/30/21	100% Percent Complete	80	<b>Off Target</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Working on formal documentation now. Overall standards will continue from current Web Service platform into the Azure API Gateway. (Marla McKinney, 10/14/21)</li> </ul>				
5.2.4.2 Define API Key Management (Marla McKinney)	01/06/20, 06/30/21	100% Percent Complete	90%	<b>Off Target</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Currently working on a solution now and almost ready to release. (Marla McKinney, 10/14/21)</li> </ul>				
5.2.4.3 Map Virtual Network Dependencies (Marla McKinney)	01/06/20, 06/30/21	100% Percent Complete	90%	<b>Deferred</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• It was decided that this will not be implemented because it is no longer needed. (Marla McKinney, 10/14/21)</li> </ul>				
5.2.4.4 Review/Approve Naming Convention, API Key Management and Virtual Network recommendations by AITS EAC (Marla McKinney)	01/06/20, 06/30/21	100% Percent Complete	100%	<b>Achieved</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Reviewed with AITS EAC (Marla McKinney, 10/14/21)</li> </ul>				
5.2.4.5 Evaluate Google Solution when more mature (Marla McKinney)	02/06/21, 06/30/21	100% Percent Complete	0%	<b>Deferred</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Will evaluate in the future when it is more mature. (Marla McKinney, 10/14/21)</li> </ul>				
5.2.4.6 Create Project Template for API Gateway Implementation (Rod Schaefer)	01/06/20, 06/30/21	100% Percent Complete	100%	<b>Achieved</b> As of 11/19/20
<p><i>Comments:</i></p> <p>Gateway is 100% Deployed in Production as a platform. We're moving most API/Web Services to the API Gateway. (Marla McKinney, 11/17/20)</p>				
5.2.5 Kafka Confluent Cloud Implementation (ADS)	07/01/20, 06/30/21	Increase cloud transaction volume by 10% by 12/30/21	15%	<b>On Target</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Purchase of Kafka Cloud solution is currently held up in agreeing to terms in the contract. Because of this, an on-premise solution is being developed. (Marla McKinney, 11/07/21)</li> </ul>				
5.2.5.1 Kafka Cloud Solution Deployment (Marla McKinney)	07/01/20, 06/30/21	100% Percent complete	80%	<b>Off Target</b> As of 10/14/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Purchase of Kafka Cloud solution is currently held up in agreeing to terms in the contract. Because of this, an on-premise solution is being developed which should improve the available needs. A vended solution is a better long-term solution. (Marla McKinney, 10/14/21)</li> </ul>				
5.2.5.2 Open EAI Decommissioning (Marla McKinney)	09/01/20, 06/30/22	Reduce OpenEAI usage by 50%	20%	<b>Off Target</b> As of 11/07/21
<p><i>Comments:</i></p>				

• AITS has gone as far as we can go on our own. We are working on getting interest and commitments from UIUC to move forward (Marla McKinney, 10/14/21)

## 6 Improve first contact resolution with advanced service desk support

### 6.1 Participate in system-wide working group to assess and select an enterprise service management tool or ITSM (TAM) (06/30/19)

**Measure:** Percent complete 100%  
**Target:** 100%

Achieved

**Comments:**

• 7/1/2019: Final report and recommendations delivered to CIOs. Next steps identified and will be included in FY20 goals. (Stephanie Dable, 09/03/20)

### 6.2 Implement chatbot solution for AITS service desk (ADS) (06/30/19)

**Measure:** Chatbot improvement KPI N/A

Achieved

**Comments:**

• Chatbot development complete. A production version was rolled out for AITS Service Desk in July 2019. The chatbot has been removed from this website because of low volume but it was an excellent way to test the features of a chatbot without impacting a large number of users. \*\* Because we've removed the chatbot, we have not implemented any improvements, so this KPI is no longer relevant. (Marla McKinney, 11/07/21)

**Target:** No longer relevant

### 6.3 Improve KnowledgeBase tool (TAM) (06/30/21)

**Measure:** KB improvement KPI 62%  
**Target:** Not set

Achieved

**Comments:**

• KB total pageviews (indicator of overall usage): 15% increase in usage in 2021. KB total users worldwide: 10% increase in users in 2021. New KB documents created by System Offices: 62% increase in new KB documents created by System Offices (Cynthia Cobb, 11/07/21)

increase in new KB documents in FY21.

### 6.4 Develop shared cost model for ITSM tool (TAM) (06/30/20)

**Measure:** Percent complete 100%  
**Target:** 100%

Achieved

**Comments:**

• 2/12/2020: Complete.

### 6.5 Acquire and implement ITSM tool (TAM) (06/30/21)

**Measure:** Percent complete 100%  
**Target:** 100%

Achieved

**Comments:**

• TeamDynamix has been implemented and is being used successfully as the ITSM tool by Service Desks across the enterprise. Rollouts continue to additional departments. (Stephanie Dable, 10/28/21)

### 6.6 Improve first contact resolution with ITSM tool (TAM) (06/30/21)

**Measure:** First contact resolution improvement

Achieved

**Comments:**

• The new ITSM tool (TeamDynamix) doesn't provide a way to measure first contact resolution. We are working on a business objects universe that will give us this capability. We are confident that this has improved as we have seen a noticeable improvement with average ticket resolution time as well as the number of tickets that are placed on hold. The ability to transfer tickets between units using a common platform (TDX) allows for faster resolution of tickets. (Stephanie Dable, 11/07/21)

**Target:** Not yet able to measure

## 7 Complete Research Administration and IAM/2FA projects

**7.1 Complete the Start myResearch project and transition to steady state maintenance (TAM) (06/30/21)**

**Measure:** Percent complete

100%

**Achieved**

**Target:** 100%

*Comments:*

- 11/16/2020: The team has transitioned to maintenance mode and is no longer considered a "project team". They have a good intake process for work, an upgrade schedule and work with the clients on prioritizing enhancements. (Stephanie Dable, 11/16/20)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>7.1.1 Complete myProposals project (TAM)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• 6/24/2019: One-off training is finishing up for Urbana and Chicago in July and will be completed in Springfield during September. (Stephanie Dable, 09/03/20)</li> </ul>	07/01/18, 09/30/19	100% Percent complete	100%	<b>Achieved</b> As of 10/06/21
<p>7.1.2 Plan for and transition to maintenance mode (TAM)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• 2/14/2020: Transition plan has been established and is being implemented through the final stages of the project transition to maintenance. 7/1/2019: Detailed transition plans have been developed and approved. These will be implemented starting in FY20. By FY21 we will be in complete maintenance mode. (Stephanie Dable, 09/03/20)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 02/27/20
<p>7.1.2.1 Complete prioritized fixes and minor enhancements (Stephanie Dable)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• 7/6/2020: The ITPC project has been completed and all new and remaining enhancements and fixes will become part of the FY21 maintenance work.</li> </ul>	07/01/18, 06/30/20	20% Percent complete	75%	<b>Achieved</b> As of 07/06/20
<p>7.1.2.2 Oracle database upgrade (Stephanie Dable)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• 5/2/2019: This was completed on 2/21/2019. (Stephanie Dable, 09/03/20)</li> </ul>	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 07/16/19
<p>7.1.2.3 myResearch software upgrade (Stephanie Dable)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• 2/20/2020: The Kualii 1908 upgrade has been implemented. Currently at least one major upgrade will be targeted with each maintenance year after the project transitions to support. (Stephanie Dable, 09/03/20)</li> </ul>	07/01/19, 06/30/20	1 Number of upgrades in FY20	1	<b>Achieved</b> As of 02/27/20
<p>7.1.2.4 Reporting in place (Stephanie Dable)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• For StartMyResearch, maintenance work is making updates to reports available in the myResearch portal or adding new reports as requested by the three universities. There is a regular stream of requests that come in as work request size tasks. (Cynthia Cobb, 11/07/21)</li> </ul>	07/01/18, 06/30/20	75% Percent complete	100%	<b>Achieved</b> As of 07/06/20
<p>7.1.3 Complete post go-live tasks for myProposals and myResearch (TAM)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• 2/14/2020: myProposals was successfully implemented as the final user facing application for research administration in the START myResearch suite. (Stephanie Dable, 09/03/20)</li> </ul>	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 02/27/20



**7.2 Complete the IAM and Multi Factor Authentication projects (PPMO) (06/30/20)**

**Measure:** Percent complete

75%

**On Target**

**Target:** 100%

*Comments:*

- Multi Factor Authentication work is complete. Most of IAM Affiliations work was achieved. The work that hasn't been completed is the UIC affiliations configuration (lack of desire to use) and the XAS replacement (delayed due to resource constraints.) (Cynthia Cobb, 09/03/20)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>7.2.1 Multi Factor Authentication (PPMO)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This is complete and deployed. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 11/07/21
<p>7.2.1.1 IAM and Duo Unification (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was deployed in FY19. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 08/30/19	100% Percent complete	100%	<b>Achieved</b> As of 01/16/20
<p>7.2.1.2 Mandatory 2FA Student Direct Deposit (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was deployed on May 21, 2019. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 05/29/19
<p>7.2.1.3 Add Duo Manage to New Hire (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was deployed on May 21, 2019. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 06/30/19	75% Percent complete	100%	<b>Achieved</b> As of 05/29/19
<p>7.2.1.4 Mandatory 2FA for My UI Info (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was completed in FY21. It was off target when completed, but it is complete. (Cynthia Cobb, 11/07/21)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 11/07/21
<p>7.2.1.5 2FA to SECAPP (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was deployed on May 14, 2019. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 05/29/19
<p>7.2.2 IAM Affiliations (PPMO)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Most of this work was achieved. UIC is not interested in the affiliations configurator and XAS replacement hasn't been started due to resource constraints. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	44%	<b>Off Target</b> As of 11/07/21
<p>7.2.2.1 UIUC Affiliations (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was deployed in FY20. (Cynthia Cobb, 09/03/20)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 01/24/20
<p>7.2.2.2 UIUC Affiliation Configurator (Cynthia Cobb)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• This was deployed March 2020 and is complete. (Cynthia Cobb, 11/07/21)</li> </ul>	07/01/18, 12/31/19	100% Percent complete	100%	<b>Achieved</b> As of 11/07/21

7.2.2.3 UIC Affiliations and Configurator (Cynthia Cobb)	07/01/19, 06/30/20	100% Percent complete	0%	<b>Deferred</b> As of 08/22/19
<i>Comments:</i>				
• UIC is not interested in this at this time. (Cynthia Cobb, 11/07/21)				
7.2.2.4 XAS replacement (Cynthia Cobb)	07/01/19, 06/30/20	100% Percent complete	5%	<b>Not Started</b> As of 01/24/20
<i>Comments:</i>				
• Capital programs and myDisclosure use XAS—XAS is our external facing system which will eventually be replaced with IAM affiliations. We've had early discussion and have only just begun this due to resource constraints on both sides. (Cynthia Cobb, 11/07/21)				
7.2.3 Midpoint work--livesync replacement and UIC new student mechanism (PPMO)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 08/22/19
<i>Comments:</i>				
• This was deployed on 11/07/20. (Cynthia Cobb, 11/07/21)				

## 8 Continue to increase the quality and speed of solutions by developing and improving upon our methodologies and processes

### 8.1 Implement methodology, resource management, and project service improvements that increase our speed to service (PPMO) (06/30/21)

Measure: Percent complete  
Target: 100%

100%

**Achieved**

*Comments:*

• In FY20 and early FY21 PMO have enhanced its project scheduling and resource management processes to include regular reviews by AITS LT to identify resource constraints and control project start dates. There are no additional enhancements planned for FY21. (Cynthia Cobb, 12/03/20)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
8.1.1 Implement a phased approach for all build projects (PPMO)	07/01/19, 06/30/21	No KPI set Percent of build projects with a release within 6 months	0%	<b>Deferred</b> As of 12/03/20
<i>Comments:</i>				
• Deferred until FY22 due to emergency pandemic related projects. (Cynthia Cobb, 11/07/21)				
8.1.2 Identify a phased approach model for projects (PPMO)	07/01/19, 06/30/21	100% Percent complete	0%	<b>Deferred</b> As of 12/03/20
<i>Comments:</i>				
• This was deferred due to emergency projects related to the pandemic. (Cynthia Cobb, 11/07/21)				
8.1.3 Improve resource management (PPMO)	07/01/19, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 12/03/20
<i>Comments:</i>				
• In FY20 and early FY21 we created a better process for ongoing resource management that involved regular AITS LT review and better control over the starting of projects. This goal is 100% complete for this FY. (Cynthia Cobb, 12/03/20)				
8.1.4 Reduce decision making delay (PPMO)	07/01/19, 06/30/21	100% Percent complete		<b>Deferred</b> As of 12/03/20
<i>Comments:</i>				
• 1/17/20: This work has not started due to increased project load and the lack of availability of PMO staff to determine actions that could improve this process. Only a small set of projects are impacted by decision making delays. Our approach is to develop a set of tools that can be used on these projects.				

We will identify projects that are likely to experience these issues and make sure the PMs and SMEs are familiar with the tools. We will measure this effort as percent complete this year, and once the tools are available, we may measure this in other ways. (Cynthia Cobb, 09/03/20)

8.1.5 Improve customer engagement commitment (PPMO)

07/01/19,  
06/30/21

Limit the number of projects that have customer availability listed as reason for overages

4

**Deferred**  
As of 12/03/20

Comments:

- 1/17/19: This work has not started due to increased project load and the lack of availability of PMO staff to determine actions that could improve this process. (Cynthia Cobb, 09/03/20)

8.1.6 Better prioritize in progress work (PPMO)

07/01/19,  
06/30/21

100%  
Percent complete

0%

**Deferred**  
As of 12/03/20

Comments:

- 1/17/20: This work has not started due to increased project load and the lack of availability of PMO staff to determine actions that could improve this process. (Cynthia Cobb, 09/03/20)

**8.2 Prepare for upcoming technology changes that will require PMs and PPM leaders to become adept change management practitioners and leaders (PPMO) (06/30/21)**

**Measure:** Percent complete  
**Target:** 50%

10%

**Deferred**

Comments:

- This was deferred due to emergency projects related to the pandemic. (Cynthia Cobb, 11/07/21)

**8.3 Increase and measure the quality of our project outcomes (PPMO) (06/30/21)**

**Measure:** Percent of projects that have met their predefined success measures

25%

**Deferred**

Comments:

- This was deferred due to emergency projects related to the pandemic. (Cynthia Cobb, 11/07/21)

**MAINTAIN RELIABLE ENTERPRISE-CLASS SERVICES STRATEGIC INITIATIVES & SUPPORTING GOALS**

**9 Maintain enterprise systems integrity, reduce risk of system failures, and improve disaster recovery processes**

**9.1 Maintain infrastructure components to ensure reliability and performance of enterprise systems (AA) (04/01/20)**

**Measure:** Percent of enterprise systems priority level 1 maintenance items implemented

100%

**Achieved**

*Comments:*

• 100% of the servers (Windows, Linux, Solaris) maintained by AITS are currently under a vendor supported version and receive regular maintenance updates. An ongoing project has been created to keep the Operating System up to date before it falls out of support. An Application Roadmap has been built to identify at risk applications. (Cynthia Cobb, 10/28/21)

**Target:** 100%

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
9.1.1 Replace RRB Emergency Cooling / Glycol Project to ensure integrity of the enterprise data center (AA)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 05/03/19
9.1.2 Upgrade storage arrays to current technologies and needed capacity (AA)	07/01/18, 03/01/21	100% Percent complete of storage arrays replacement	100%	<b>Achieved</b> As of 10/28/21
9.1.3 Update physical security controls of enterprise spaces - upgrades include surveillance, and card readers (AA)	07/01/18, 07/01/21	100% Percent complete	100%	<b>Achieved</b> As of 10/28/21
9.1.4 Assess Banner hardware and make replacement decision (ITSO)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 08/22/19

**9.2 Modernize the DR and BCP plans and processes to meet high availability and recovery needs of the university (AA) (06/30/21)**

**Measure:** DR Plans are revised and tested

75%

**On Target**

*Comments:*

• 11/27/21: Disaster Recovery tabletop exercises with all IT players has been held. A separate BCP effort for the System Offices is being completed by another unit.

**Target:** 75%

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
9.2.1 Revise system architecture to provide DR capabilities through near real-time replication (AA)	07/01/18, 06/30/21	80% Priority 1 systems replicated across data centers	80%	<b>On Target</b> As of 10/28/21

*Comments:*

• The bulk of the new infrastructure is in place to support the new DR architecture to support real-time

replication using SRDF. Testing of the new solution is expected to take place in late Fall 2021 and into Spring 2022. (Cynthia Cobb, 10/28/21)

9.2.2 Redevelop the AITS DR / BCP plans to reflect new RTO and DR architecture (ITSO)	07/01/19, 06/30/21	100% Percent complete	80%	<b>Off Target</b> As of 10/28/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>The architecture plans have been modified to take advantage of product features in new SAN arrays specifically designed for DR. Formal architecture plans are being designed and produced by EAC. The Huron engagement is underway, and the first phase is complete, and the second phase is underway and on target (Nyle Bolliger, 10/28/21)</li> </ul>				

9.2.2.1 Engage implementation partner to co-develop new DR plan and program (Brian Schoudel)	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 10/28/21
<p><i>Comments:</i></p> <p>11:28:22: First engagement with Huron complete and new program and draft plan is complete. (Brian Schoudel, 09/03/20)</p>				

**9.3 Ensure that enterprise systems are kept at the forefront of technology and follow industry best practices to minimize the risk of failure and optimize performance (AA) (06/30/21)**

*Comments:*

- Current numbers are Linux 97%, Solaris 86%, and Windows 80%. Note Windows number will go up shortly once migrations to new hardware are complete. (Cynthia Cobb, 10/28/21)

**Measure:** Percent of systems maintained at or near current release (average of hardware, OS, and application compliance)

**Target:** 85%

85% **Achieved**

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
9.3.1 Develop dashboards to provide insight into the aging of hardware and operating systems and applications (AA)	04/01/19, 09/30/19	100% Percent complete of dashboard and reporting mechanisms	100%	<b>Achieved</b> As of 08/22/19
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>08/22/19 - Tableau dashboard completed <a href="https://tableau.admin.uillinois.edu/views/ServerandOperatingSystemAnalysis/ServerNames">https://tableau.admin.uillinois.edu/views/ServerandOperatingSystemAnalysis/ServerNames</a> (Brian Schoudel, 09/03/20)</li> </ul>				
9.3.2 Develop IT Roadmap and architectural vision to identify and plan for efforts to maintain the viability of enterprise systems (AA)	07/01/18, 06/30/21	100% Percent of plan developed and actively being managed	100%	<b>Achieved</b> As of 10/28/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>IT Roadmap was developed by the AITS Enterprise Architecture Committee and is now in regular cadence of review and updates to it. (Cynthia Cobb, 10/28/21)</li> </ul>				
9.3.3 Upgrade AITS Windows, Linux, Solaris, and networking hardware to meet industry standards for hardware supportability and performance (AA)	07/01/18, 06/30/21	85% Percent of hardware meeting or exceeding support standards	95%	<b>Achieved</b> As of 10/28/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Current numbers are Linux 96%, Solaris 79.4%, Windows 77.9 (Brian Schoudel, 09/03/20)</li> </ul>				

**9.4 Modernize and update facilities to provide a collaborative and safe work environment (ITSO) (06/30/21)**

*Comments:*

- As Return to Office post-pandemic continues, significant changes to the AITS workspaces continue. With a large number of resources opting to work remotely full-time or hybrid,

**Measure:** Percent complete  
**Target:** 90%

90% **On Target**

emphasis has been placed on updating the Gerty facility as office space is consolidated from HAB, AOB, MAB, Z-building, and RRB into Gerty. Major restroom renovations are underway in Gerty to take advantage of the limited numbers of staff currently in the building. Collaboration areas and hotel spaces are being built to better support collaborative work when employees are in the office. Technology updates include more electronic collaboration boards and equipment compatible with tools such as Teams. Touchless features have also been installed to promote safety and increased hygiene practices (Nyle Bolliger, 10/28/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>9.4.1 AOB office remodel (ITSO)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>This effort remains deferred as long-term RTO plans are implemented. AOB may only be used for a small number of hotel spaces for AITS employees with no permanent staff residing there. As a result, no further investments in space will be made at this time. (Nyle Bolliger, 10/28/21)</li> </ul>	04/01/19, 06/30/21	100% Percent complete	20%	<b>Deferred</b> As of 10/28/21
<p>9.4.2 HAB facility remodel (ITSO)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>2020-01-29 Phase 3 completed. Open House celebration scheduled in mid-February to highlight the new space. Work is underway. Phase 1 will be completed by mid-August. Phase 2 is underway. Phase 3 is in scoping and planning stage. (Nyle Bolliger, 09/03/20)</li> </ul>	04/01/19, 12/31/19	100% Percent complete	100%	<b>Achieved</b> As of 01/29/20
<p>9.4.3 Invest in video conferencing technologies and installations in AITS workspaces (ITSO)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>The collaboration monitors previously purchased are being deployed in collaboration spaces instead of individual offices. This is in alignment with the RTO plans adopted by AITS. Significant upgrades to video conferencing equipment were made prior to COVID which included large interactive displays and updated cameras. The equipment in conference rooms is being updated to be compatible with Zoom and MS Teams. (Nyle Bolliger, 10/28/21)</li> </ul>	07/01/18, 06/30/20	90% Percent complete	90%	<b>On Target</b> As of 10/28/21
<p><b>9.5 Develop a data center strategy to provide a roadmap for long term placement of AITS systems (ITSO) (06/30/21)</b></p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Excipio has completed their evaluations of data center spaces across the university and submitted recommendations. AITS is working with Technology Services in Urbana and Technology Solutions in Chicago to develop a long-term roadmap for data centers and the needs of enterprise systems. AITS is also part of the university-wide effort to consolidate data center spaces and share these facilities across the system. AITS has also adopted a strategy of looking for Software as a Service solutions first when replacing systems. This will help reduce the data center footprint over time. (Nyle Bolliger, 10/28/21)</li> </ul>		<b>Measure:</b> Data Center Strategy Reviewed and Accepted. <b>Target :</b> 100%	100%	<b>Achieved</b>
<b>10 Increase our agility and responsiveness to System needs by leveraging cloud technologies</b>				
<p><b>10.1 Cloud strategy and planning (Cloud and ESA) (06/30/21)</b></p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Oct 2021 - See detailed comments for each sub-initiative. (Chris Barton, 10/21/21)</li> </ul>		<b>Measure:</b> Percent complete <b>Target:</b> 100%	66%	<b>Achieved</b>
SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS

10.1.1 Establish cloud implementation roadmap (Cloud and ESA)	07/01/18, 01/17/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 – Pilots and research at AWS, Azure, and Oracle Cloud concluded. AITS has adopted a Cloud Considerate strategy (as opposed to Cloud First). Primarily utilizing Software as a Service (SaaS) offerings. Infrastructure as a Service (IaaS) generally remaining on premise. Cloud vs on-premise placement are determined by factors such as features, flexibility, and speed. (Chris Barton, 10/21/21)</li> </ul>				
10.1.2 Develop multi provider cloud strategy (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 – For IaaS, AITS has selected Azure as its primary provider, and AWS as an approved alternate provider. Database migrations to the cloud are no longer being considered, which eliminates the need for an integration strategy between multiple providers. (Chris Barton, 10/21/21)</li> </ul>				
10.1.3 Establish cloud cost management process (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Monthly cost reporting for AWS and Azure subscriptions is in place. In addition, a monthly reconciliation report has been developed to align cloud costs with the billings received by AITS. (Tony Kerber, 11/17/20)</li> </ul>				
10.1.4 Identify cloud funding and budget model (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 - Initiatives are adequately funded using the ITSO budget or from other special sources of funds such as ITPC funds. This approach is well aligned with the current scope of activities and migrations. There is no longer a cloud first strategy which eliminates the need to convert from capital expenditures to operating expenses. (Chris Barton, 10/21/21)</li> </ul>				
10.1.5 Create cloud adoption framework (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 - Previously achieved. (Chris Barton, 10/21/21)</li> </ul>				
10.1.6 Create cloud staff training and staffing strategies (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 – No additional specific training is needed as part of the cloud program. Employees will obtain cloud skills through routine training within AITS as necessary. (Chris Barton, 10/21/21)</li> </ul>				
10.1.7 Internal cloud audit (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 Previously achieved (Chris Barton, 10/21/21)</li> </ul>				
10.1.8 Complete cloud strategy document (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Oct 2021 Previously achieved (Chris Barton, 10/21/21)</li> </ul>				
10.1.9 Develop cloud portfolio (Cloud and ESA)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 06/24/19
<p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Portfolio has been developed. Document is periodically reviewed and updated. (Chris Barton, 09/03/20)</li> </ul>				
10.1.10 Establish cloud governance (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p><i>Comments:</i></p>				

• Oct 2021 – Services are managed using ITPC, the AITS Leadership Team, and UI ITLT committees, and the AITS Cloud Leadership group. (Chris Barton, 10/21/21)

## 10.2 Cloud architecture and DevOps processes and tools (Cloud and ESA) (06/30/21)

Measure: Percent complete

70%

Off Target

Target: 100%

### Comments:

• Oct 2021 – This initiative has been transferred to AITS Application Development & Support under Marla McKinney. Pete Herrig has a dual reporting line to Marla to facilitate this effort. Tracking of this work will be closed as part of this cloud program (Chris Barton, 10/21/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>10.2.1 Container development, maintenance, and deployment standards (Cloud and ESA)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>• Oct 2021 - Kubernetes is no longer being investigated in favor of the on-premise Jenkins pipeline. Docker is being utilized in several locations on-premise and is fully supported by the Linux team. (Chris Barton, 10/21/21)</li> </ul>	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>10.2.2 Business continuity requirements established (Cloud and ESA)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>• Oct 2021 - Each cloud service will need to have a System Recovery Plan (SRP) generated. This work is formally taking place as part of the AITS/Huron BCP/DR initiative where this work will now be tracked, and/or as part of the existing AITS SaaS on-boarding process. (Chris Barton, 10/21/21)</li> </ul>	07/01/18, 06/30/21	100% Percent complete	0%	<b>Off Target</b> As of 11/07/21
<p>10.2.3 Develop use cases and deployment process for primary providers (Cloud and ESA)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>• Oct 2021 Previously achieved. (Chris Barton, 10/21/21)</li> </ul>	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>10.2.4 Application latency study (Cloud and ESA)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>• Oct 2021 - A Kubernetes investigation is no longer needed (see Container development above). A previous latency study with AITS Application Development &amp; Support and Jeff Heckel has confirmed that latency at Azure and AWS offers ample performance for web applications. (Chris Barton, 10/21/21)</li> </ul>	07/01/18, 06/30/21	85% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>10.2.5 Infrastructure as code practices (Cloud and ESA)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>• Oct 2021 - For Azure, less formal IaC practices that permit division of labor and increased autonomy have been piloted and validated. Instead of all code being pushed centrally, AITS practitioners can make changes using their tools/methods of choice, and an automated process downloads the configuration and monitors all Azure changes centrally. An audit of the monitoring process will be performed as a separate work request. (Chris Barton, 10/21/21)</li> </ul>	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>10.2.6 Implement DevOps processes (Cloud and ESA)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>• Oct 2021 - This initiative has been transferred to AITS Application Development &amp; Support under Marla McKinney. Pete Herrig has a dual reporting line to Marla to facilitate this effort. Tracking of this work will be closed as part of this cloud program. (Chris Barton, 10/21/21)</li> </ul>	07/01/18, 06/30/21	100% Percent complete	0%	<b>Off Target</b> As of 11/07/21



10.2.7 Integrate test process into automation pipeline (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	0%	<b>Off Target</b> As of 11/07/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 - This initiative has been transferred to AITS Application Development &amp; Support under Marla McKinney. Pete Herrig has a dual reporting line to Marla to facilitate this effort. Tracking of this work will be closed as part of this cloud program. (Chris Barton, 10/21/21)</li> </ul>				

10.2.8 Guidelines for provider placement based on workload (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 – For IaaS, AITS has selected Azure as its primary provider, and AWS as an approved alternate provider regardless of workload type. Databases should remain on-premise. (Chris Barton, 10/21/21)</li> </ul>				

10.2.9 Workload placement for particular initiatives (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 - Our preferred cloud service providers in order of preference are Azure, SaaS providers (generally software vendors), and if necessary, AWS. (Chris Barton, 10/21/21)</li> </ul>				

### 10.3 Cloud implementation (Cloud and ESA) (06/30/21)

**Measure:** Percent complete  
**Target:** 100%  
25% **Deferred**

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
10.3.1 Roll out Azure as a production service (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 – Azure has been fully launched as production service. The API Management Service (a.k.a. AITS API Gateway) is our first official offering which is managed by Jared Crowe and the Integration Competency Center. (Chris Barton, 10/21/21)</li> </ul>				
10.3.2 Deploy pilot applications (Cloud and ESA)	07/01/18, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/21/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 – The API Management Service was launched successfully and promoted to production. The Application Insights (SiteScope replacement) service was unsuccessful and replaced by Uptrends. A Kubernetes pilot was withdrawn. (Chris Barton, 10/21/21)</li> </ul>				
10.3.3 Migrate systems (Cloud and ESA)	07/01/18, 06/30/21	100% Monthly cloud spend, Number of cloud applications KPIs	0%	<b>Deferred</b> As of 11/07/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 - This initiative is being withdrawn. The initial intent was to migrate any/all systems in general. The new intent is to think strategically and focus only on targeted systems. Along these lines, new SaaS systems are increasingly being implemented on a regular basis. Eliminating the data center will be re-evaluated in subsequent years and with input from the forthcoming data center strategy. (Chris Barton, 10/21/21)</li> </ul>				
10.3.4 Reduce data center footprint (Cloud and ESA)	07/01/18, 06/30/21	100% Number of VMs on premise KPI	0%	<b>Deferred</b> As of 11/07/21
<p>Comments:</p> <ul style="list-style-type: none"> <li>Oct 2021 - This initiative is being withdrawn. The initial intent was to migrate any/all systems in general. The new intent is to think strategically and focus only on targeted systems. Along these lines, new SaaS systems are increasingly being implemented on a regular basis. Eliminating the data center will be re-evaluated in subsequent years and with input from the forthcoming data center strategy. (Chris Barton, 10/21/21)</li> </ul>				

10.3.5 Meet or exceed on premise system performance (Cloud and ESA)

07/01/18,  
06/30/21

100%  
Percent of cloud  
systems with successful  
AITS load test KPI

0%

**Deferred**  
As of 11/07/21

Comments:

• Oct 2021 – This initiative is being withdrawn because it pertains to cloud applications that are no longer being migrated from on-premise. Note newly deployed SaaS applications are evaluated and adjusted to meet performance requirements. (Chris Barton, 10/21/21)

**11 Continue to protect system office computing infrastructure and user platforms**

**11.1 Implement Illinois Security program (Cloud and ESA) (06/30/21)**

**Measure:** Percent complete implementation of Illinois Security Program

10%

**On Target**

Comments:

• Oct 2021 -- Process in progress to implement 18 standards. Document and review framework now in place. New controls have been added such as 2FA VPN. The Illinois Security Program is also being revised by Technology Services. (Chris Barton, 10/21/21)

**Target:** 10%

**11.2 Manage active audit engagements and open audit findings (Cloud and ESA) (06/30/21)**

**Measure:** Percent Complete

100%

**Achieved**

Comments:

• Oct 2021 – There were three findings from FY20: GLBA risk assessment, Cybersecurity, and Workstation/Servers. The GLBA risk assessment has been completed resulting in 9 recommendations. The external auditor is also reviewing IT general controls related to Banner and Epic. (Chris Barton, 10/21/21)

**Target:** 100%

**11.3 Enhance protection mechanisms for sensitive information stored within computing systems (Cloud and ESA) (06/30/21)**

**Measure:** Percent Complete

66%

**On Target**

Comments:

• Oct 2021 – Implemented detection/blocking of attacker network reconnaissance scans. Blockhole router now in place. Newly in progress: Backup retention improvements, tightening server perimeters, and more secure server administration. (Chris Barton, 10/21/21)

**Target:** 66%

REMAIN PREPARED AND RESPONSIVE TO UI SYSTEM NEEDS  
STRATEGIC INITIATIVES & SUPPORTING GOALS

12 Research and development to ensure our readiness to quickly respond to new technologies and System needs.

12.1 Conversational AI Platforms (ADS) (06/30/20)

Measure: Number of customers wanting to use the Chatbot

5

Achieved

Comments:

• We've deployed 2 chatbots: OBFS Pay My Bill and an experimental one for the AITS Service Desk. We have worked with 3 other clients (UIC service desk, UIUC HR, and UIUC Career Center.). UIC service desk effort was abandoned due to a technical limitation, and the two UIUC groups determined they were not ready to implement. (Cynthia Cobb, 11/07/21)

Target: 3

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>12.1.1 Deploy AITS Service Desk chatbot V1.0 (ADS)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>The AITS Service Desk chatbot was deployed on July 18, 2019, to web page <a href="https://www.aitis.uillinois.edu/get_help/frequently_asked_questions">https://www.aitis.uillinois.edu/get_help/frequently_asked_questions</a>. The chatbot has been removed from this website because of low volume but it was an excellent way to test the features of a chatbot without impacting many users. Chatbots will be rolled out to other pages and trained for new topics as needed. (Marla McKinney, 10/13/21)</li> </ul>	07/01/18, 07/18/19	100% Percent complete	100%	Achieved As of 10/13/21
<p>12.1.1.1 Complete AITS Service Desk experimental beta chatbot (Marla McKinney)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>The AITS Service Desk Chatbot was moved to production. The chatbot has been removed from this website because of low volume but it was an excellent way to test the features of a chatbot without impacting many users. (Marla McKinney, 10/14/21)</li> </ul>	07/01/18, 06/30/19	100% Percentage Complete	100%	Achieved As of 10/13/21
<p>12.1.1.2 Document Software Development Lifecycle (SDLC) process for Chatbots and publish on a website (Marla McKinney)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>The Software Development Lifecycle process was evaluated throughout the AITS Service Desk experimental chatbot project. A formal SDLC process has been documented. The SDLC process has been published on a website for easy access. (Marla McKinney, 10/14/21)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	100%	Achieved As of 10/13/21
<p>12.1.1.3 Work with UIC to determine if their help desk can use the experimental chatbot (Marla McKinney)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>This initiative was put on hold because the chatbot could not be implemented with their current Content Management System (WordPress). (Marla McKinney, 11/17/20)</li> </ul>	04/15/19, 09/30/19	100% Percent complete	90%	Deferred As of 10/14/21
<p>12.1.2 Work with other customers to expand use of chatbot (ADS)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>UIC work has been deferred due to technical limitations with current web site. Pay My Bill chatbot has been deployed in production and is in maintenance mode. Other clients were initially interested but determined that they weren't ready or didn't want to implement a chat bot at this time. (Marla McKinney, 09/03/20)</li> </ul>	04/01/19, 06/30/21	100% Percent complete	100%	Achieved As of 11/16/20
<p>12.1.2.1 UIC Chatbot for Service Desk (Marla McKinney)</p> <p>Comments:</p> <ul style="list-style-type: none"> <li>This work has been deferred due to technological challenges with UIC's web content system. (Marla McKinney, 09/03/20)</li> </ul>	04/01/19, 03/31/20	100% Percent complete	90%	Deferred As of 07/13/20

12.1.2.2 Evaluate chatbot for Pay My Bill (OBFS) (Marla McKinney)	07/01/19, 04/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/13/20
<i>Comments:</i>				
• Chatbox is in production on Pay My Bill website and continue to help Business Owner to maintain and update content for the chatbot. (Marla McKinney, 09/03/20)				
12.1.2.3 Evaluate Chatbot for UIUC Career Center (Marla McKinney)	08/01/19, 06/30/20	100% Percent complete	0%	<b>Deferred</b> As of 10/13/21
<i>Comments:</i>				
• Client not interested at this time (Marla McKinney, 11/16/20)				
12.1.2.4 Evaluate chatbot for System HR	04/01/19, 06/30/22	100% Percent complete	0%	<b>Deferred</b> As of 10/13/21
<i>Comments:</i>				
• HR is not ready to implement a chatbot. (Marla McKinney, 10/13/21)				
12.1.3 Design and develop support infrastructure for the chatbot (ADS)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 10/13/21
<i>Comments:</i>				
• We have the design and support infrastructure in place for the chatbot. We are using DialogFlow to develop the chatbots and we have a user friendly front-end that also provides metrics for the chatbots. (Marla McKinney, 10/13/21)				
12.1.3.1 Determine chatbot training and maintenance needs (Marla McKinney)	07/01/19, 04/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/13/20
<i>Comments:</i>				
• Training and maintenance needs have been identified so the business owners can help maintain the content of the Chatbot. AITS will support as needed. We also taught McKinley Health how to develop their own chatbot which can be found on mckinley.illinois.edu which they are very pleased. (Marla McKinney, 10/13/21)				
12.1.3.2 Build and publish fundamental chatbot response best practices (Marla McKinney)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/13/20
<i>Comments:</i>				
• MS Teams site has been developed to collaborate and share chatbot processes, best practices, and analysis information. (Marla McKinney, 10/13/21)				
12.1.3.3 Determine metrics needed to analyze the success of the chatbot (Marla McKinney)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/13/20
<i>Comments:</i>				
• Currently getting reports on Bot performance using Kommunicate and DialogFlow reports. (Marla McKinney, 09/03/20)				
12.1.3.4 Evaluate Security of chatbot such as conversational logs and privacy (Marla McKinney)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/13/20
<i>Comments:</i>				
• Security for current deployment model has been reviewed by the Assurance group in AITS. (Marla McKinney, 09/03/20)				
12.1.4 Research Unified Personal Assistant - Voice-based and authentication capabilities (ADS)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 10/13/21
<i>Comments:</i>				
• Evaluating a vended chatbot solution (Unified) to see if it can meet our needs for some of the AI features we have been researching. Decision was made not to move ahead with Unified due to contract and cost issues. (Marla McKinney, 09/03/20)				

## 12.2 Robotic Process Automation (RPA) (ADS) (06/30/21)

**Measure:** Number of RPA applications requested

56

**Achieved**

Comments:

• A total of 22 RPA solutions have been implemented and 5 are in process. We also engaged on 29 other requests that were either withdrawn by the client or were not good candidates for automation. (Marla McKinney, 11/07/21)

Target: 20

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>12.2.1 Research Robotic Process Automation (ADS)</p> <p>Comments:                      • Several peer universities have been contacted to discuss their RPA journeys. RPA conferences have been attended. Gartner Technical Profession resources have been used to understand the state of RPA and recommended approaches. (Marla McKinney, 09/03/20)</p>	04/01/19, 02/28/20	100% Percent complete	100%	<b>Achieved</b> As of 10/14/21
<p>12.2.1.1 Engage Gartner as a SME and establish recurring participation for RPA strategy (Tony Kerber)</p> <p>Comments:                      • Initial meeting with Gartner was held on May 22, 2019, to discuss RPA. Gartner has been engaged on a recurring basis going forward to assist with vendor selection and contract negotiation. (Tony Kerber, 09/03/20)</p>	05/01/19, 06/30/20	100% Percent Complete	100%	<b>Achieved</b> As of 07/13/20
<p>12.2.1.2 Determine resources and skills needed to support the RPA projects (Marla McKinney)</p> <p>Comments:                      • Intelligence Process Automation (IPA) group has been established. Two Business Process Automation (BPA) engineers and a Solutions Architect have been hired. These roles will work with existing BPI, Automation, and Integration groups to evaluate, develop, and deploy RPA solutions. IPA group has also incorporated business analysts and have consulted with other operational areas of AITS (Marla McKinney, 10/14/21)</p>	07/01/19, 06/30/20	100% Percent complete	100%	<b>On Target</b> As of 10/14/21
<p>12.2.1.3 Design and develop support infrastructure for RPA (Marla McKinney)</p> <p>Comments:                      • Infrastructure is in place to support RPA (Marla McKinney, 10/14/21)</p>	07/01/20, 06/30/21	100% Percent Complete	100%	<b>Achieved</b> As of 10/14/21
<p>12.2.1.3.1 Determine RPA Training and Maintenance Needs (Marla McKinney)</p> <p>Comments:                      • Preliminary online training has been completed in preparation for vendor training. Vendor provided training has been completed. Operational needs have been identified and, in some cases, addressed. An initial support model has been implemented and is being evaluated on a periodic basis (Marla McKinney, 10/14/21)</p>	07/01/20, 06/30/21	100% Percent Complete	100%	<b>Achieved</b> As of 10/14/21
<p>12.2.1.3.2 Determine Metrics needed to analyze the success of RPA (Tony Kerber)</p> <p>Comments:                      • A tableau dashboard was created in FY21 to communicate and monitor the value we are providing through IPA and RPA.                      • Some initial areas for measurement are: - Time saved - Steps reduced or automated - Error reduction - Customer satisfaction (Tony Kerber, 11/16/20)</p>	07/01/20, 06/30/21	100% Percent Complete	100%	<b>Achieved</b> As of 10/14/21
<p>12.2.1.3.3 Document RPA best practices (Tony Kerber)</p> <p>Comments:                      • A group called AITS-IPA-Group has been created in MS Teams. Instructions and best practices are being documented in the RPA Developers channel. (Tony Kerber, 11/16/20)</p>	07/01/20, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/14/21
<p>12.2.1.4 Contact peer universities and other businesses that have initiated or successfully implemented RPA (Tony Kerber)</p>	04/01/19, 02/28/20	100% Percent complete	100%	<b>Achieved</b> As of 07/13/20

Comments:

- Have met with University of Michigan, Rutgers University and University of Maryland. Publications and materials from University of Melbourne and Notre Dame have been reviewed. Private organizations have been engaged at various conferences to understand their implementation efforts. (Tony Kerber, 09/03/20)

12.2.2 Communicate RPA initiative to System Offices and gather potential use cases (ADS)

06/03/19,  
06/30/21

100%  
Percent complete

100%

**Achieved**

As of 11/07/21

Comments:

- In FY20, CFO leaders were communicated with, and potential use cases were gathered in the FY20 senior leadership retreat.
- BPI is collecting both Intelligent Process Automation (IPA) and Robotic Process Automation (RPA) use cases. For RPA they are flushing out pertinent information for the next set of RPA development use cases. (Tony Kerber, 11/17/20)

12.2.3 Evaluate, select, and implement RPA solution (ADS)

09/02/19,  
10/30/20

90%  
Percent complete

100%

**Achieved**

As of 10/14/21

Comments:

- RPA solution has been implemented and the IPA group is actively creating solutions. (Cynthia Cobb, 11/27/21)

12.2.4 Establish a center of excellence to determine best practices and provide governance (ADS)

01/06/20,  
06/30/21

100%  
Percent complete

100%

**Achieved**

As of 11/07/21

Comments:

- Portfolio management activities, including governance, were designed and are currently in use. (Cynthia Cobb, 11/07/21)
- A virtual team called Intelligent Process Automation (IPA) has been created. The team is tasked with the intake and evaluation of use cases, solution design, development, and governance. (Tony Kerber, 11/17/20)

12.2.5 Develop and implement System Office RPA applications (ADS)

06/01/20,  
06/30/22

100%  
Percent complete

100%

**Achieved**

As of 10/14/21

Comments:

- A total of 16 bots have been implemented for System Office use cases. Other automation requests are being evaluated as possible RPA opportunities. (Marla McKinney, 10/14/21)

12.2.6 Complete Bot Build Statement of Work (ADS)

08/03/20,  
08/06/21

100%  
Percent complete

100%

**Achieved**

As of 10/14/21

Comments:

- Bot build engagement has been completed. Marla McKinney, 10/14/21

### 12.3 Research Blockchain technology (ADS) (06/30/20)

**Measure:** Percent Complete

100%

**Achieved**

Comments:

- Meetings were held with University of Maryland and MIT to discuss their blockchain implementation. Blockchain was evaluated within the context of the University of Illinois. At this time, it was determined that Blockchain technology and practical use was too immature to pursue. Continued research will be tabled until some future point in time. (Marla McKinney, 09/03/20)

**Target:** 100%

### 12.4 Form an Innovation Team (ADS) (06/30/19)

**Measure:** Innovation Team KPI  
TBD

100%

**Achieved**

Comments:

- The Innovation Service Team has been formed. Innovation Service charter and business plan will be developed over the next couple of months. Initial mission and vision have been completed along with innovation life cycle. (Marla McKinney, 09/03/20)

**Target:** 100%

**12.5 Research Biometric Technology such as Facial, Voice and Fingerprint (ADS) (12/30/19)**

**Measure:** Percent complete  
**Target:** 100%

100%

**Achieved**

*Comments:*

- We have done some research with biometrics, facial recognition and voice using Google Lens and Apple products but have not identified practical use cases to date. (Marla McKinney, 10/13/21)

**13 Support the development of a system wide strength in data analytics**

**13.1 Provide leadership and education on the use of data and analytics. Pursue partnerships that leverage our efforts across the universities (DS) (06/30/21)**

**Measure:** Number of data analytics partnerships that result in new solutions  
**Target:** 4

1

**Off Target**

*Comments:*

- A System Data Governance program has been initiated and a cross-functional team has come together with a charge from Paul Ellinger and Avijit Ghosh. We also engaged with the new UIC CIO on partnerships and data governance at UIC after he had a few months to acclimate to his new role. He has expressed interest in using data more effectively and is interested in how data governance can enable that. The CFO report portal was completed and made available for System leadership use. It was also great to deliver on the UIUC data summit, and the feedback gathered there has been invaluable in defining future initiatives. We haven't seen any further activity in the Computing and Data Group of Discovery Partners Institute. While individual items that make up this goal were achieved the overall goal is off-target due to leadership changes and the impact of COVID-related work taking a higher priority. (Cynthia Cobb, 10/25/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>13.1.1 Co-lead University of Illinois at Urbana Champaign Data Summit (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• The summit was very well received and had close to 200 attendees. It informed strategic planning efforts around Data Science. (Dimuthu Tilakaratne, 09/03/20)</li> </ul>	07/01/18, 09/01/18	100% Percent complete	100%	<b>Achieved</b> As of 06/26/19
<p>13.1.2 Assist University of Illinois at Chicago CIO, with developing an Information Management program (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• We are starting discussions with the new CIO, Matt Riley to engage him in the vision of data governance at UIC. He has expressed interest and is looking forward to working with us. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	07/01/18, 06/30/21	75% Percent complete	50%	<b>Off Target</b> As of 10/25/21
<p>13.1.3 Explore developing a University System Enterprise Information Management program (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• The work on the portal to present System Office executive reporting is complete. A System Data Governance program was initiated, and a cross-functional team has come together with a charge from Paul Ellinger and Avijit Ghosh. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	02/01/19, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/25/21
<p>13.1.4 Collaborate with Discover Partners Institute initiatives as they become defined (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• There has been no further activity within the Computing and Data Track of DPI that we have been involved in (Cynthia Cobb, 10/25/21)</li> </ul>	02/01/19, 06/30/21	100% Percent complete	50%	<b>Deferred</b> As of 10/25/21

**13.2 Provide a comprehensive and trusted data resource for the System (DS) (06/30/21)**

**Measure:** Increase in new data solutions KPI

9

**Achieved**

*Comments:*

• The projects to make UIS Slate Undergrad, UIUC Asset Inventory and Management, UIC Slate Undergrad, and StartMyResearch Proposal Transmittal data for analysis and reporting are complete. In addition, we provided a temporary reporting solution that enabled the S2P Contracts+ project to move forward. We are on target for the analysis and reporting work for the overall Source2Pay Program. This enhances the data available to the university community for planning and reporting in a self-service environment. We were able to make good progress on the items that make up this goal and served one of our fundamental values of making data available for self-service at the university. Although we are off target on the overall goal, we are only off by 1 solution. As with other goals, the impact of COVID-related work challenged forward progress on these goals. (Dimuthu Tilakaratne, 10/25/21)

**Target:** 9

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>13.2.1 UIC Slate (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• UIC Undergrad Slate data reporting solution was deployed on 10/24 (Dimuthu Tilakaratne, 09/03/20)</li> </ul>	07/01/18, 10/30/19	100% Percent complete	100%	<b>Achieved</b> As of 12/23/19
<p>13.2.2 STARTmyResearch (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• The Proposal Transmittal data has been added to the data warehouse and Proposal Universe in EDDIE. (Dimuthu Tilakaratne, 09/03/20)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/12/20
<p>13.2.3 iBuy (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• We have decided to defer this effort until the Source2Pay effort is further developed, (Dimuthu Tilakaratne, 09/03/20)</li> </ul>	07/01/18, 06/30/20	100% Percent complete	25%	<b>Deferred</b> As of 08/21/19
<p>13.2.4 UIS Slate Undergrad (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• UIS Slate Undergrad data and business intelligence solutions were made available for reporting/analysis on 10/21/21. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	01/01/20, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/25/21
<p>13.2.5 Legal Files (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Data acquisition is complete, and access has been granted to clients to use the solution. (Dimuthu Tilakaratne, 09/03/20)</li> </ul>	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 05/29/19
<p>13.2.6 AIM (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• Asset and Inventory Management data and business intelligence solutions were made available for reporting/analysis on 3/23/21. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	07/01/20, 06/30/21	75% Percent complete	100%	<b>Achieved</b> As of 10/25/21
<p>13.2.7 John Marshall Law School (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>• No requirements to bring this data have been identified. We will review again if necessary. (Dimuthu Tilakaratne, 11/17/20)</li> </ul>	07/01/20, 06/30/21	50% Percent complete	0%	<b>Deferred</b> As of 10/25/21



13.2.8 Source2Pay Program Data (DS)	07/01/20, 06/30/21	50% Percent complete	50%	<b>On Target</b> As of 10/25/21
<i>Comments:</i> <ul style="list-style-type: none"> <li>The data from Contracts+ Phase 1 reporting will be made available for analysis on 10/26/21. We are engaged with the Source2Pay program to provide analysis and reporting on ChromeRiver and Invoicing applications as their implementation projects proceed. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>				

13.2.9 Applicant Tracking System (Hiretouch Replacement) (DS)	07/01/20, 06/30/21	50% Percent complete	50%	<b>Deferred</b> As of 10/25/21
<i>Comments:</i> <ul style="list-style-type: none"> <li>No change--we do not believe we need a BI solution right now. (Cynthia Cobb, 10/25/21)</li> </ul>				

13.2.10 Ability LMS (DS)	07/01/20, 06/30/21	25% Percent complete	0%	<b>Deferred</b> As of 10/25/21
<i>Comments:</i> <ul style="list-style-type: none"> <li>Resources were not available to complete this due to higher priority projects. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>				

**13.3 Increase use of or improve the usability of the data warehouse so reliable data is easily accessible by all our universities, regional campuses, and Illinois Extension sites (DS) (06/30/21)**

**Measure:** Data warehouse usability projects completed KPI

5

**Off Target**

*Comments:*

We continue to make improvements to dashboards and deploy mobile versions with the improvements. The most recent change was an update of the enrollment dashboard, and we are on track for a fall deployment of a mobile version of the Miles Square Health Centers dashboard. These dashboards deliver on the president's vision to be more transparent with the impact of the university. Additionally, the shared metadata solution was implemented and some units at the university have taken advantage of it including the SHIELD programs. We are encouraging units to document their data systems and interest is growing. The UIC Institutional Research Office is investigating how to use the tool to document their dashboards. (Dimuthu Tilakaratne, 10/25/21)

**Target: 7**

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
13.3.1 Develop strategy for mobile friendly dashboards (DS)	07/01/18, 06/30/19	100% Percent complete	100%	<b>Achieved</b> As of 11/17/20
<i>Comments:</i> <ul style="list-style-type: none"> <li>The strategy for mobile dashboards has been defined, including how to present them on web pages. (Dimuthu Tilakaratne, 09/03/20)</li> </ul>				
13.3.2 Make System Data page and CFO dashboards mobile friendly (DS)	05/01/19, 06/30/21	35% Percent complete	75%	<b>On Target</b> As of 10/25/21
<i>Comments:</i> <ul style="list-style-type: none"> <li>We continue to make improvements to dashboards and deploy mobile versions as well. We have deployed a mobile version for the enrollment dashboard and are on track for a fall deployment of a mobile version of the Miles Squared Health Centers dashboard. (Dimuthu Tilakaratne, 10/25/21)</li> <li>We have deployed phone and desktop version of Advancement, R&amp;D and Financial Aid dashboards. We are working on tablet versions. (Dimuthu Tilakaratne, 11/17/20)</li> </ul>				
13.3.3 Complete CFO requested and BOT dashboards (DS)	07/01/18, 03/01/20	100% Percent complete	75%	<b>Deferred</b> As of 11/17/20
<i>Comments:</i> <ul style="list-style-type: none"> <li>This became a lower priority for our clients during the pandemic. (Dimuthu Tilakaratne, 11/30/21)</li> </ul>				
13.3.4 Complete upgrade of SAP Business Objects to maintain system support and add new features (DS)	07/01/18, 05/01/19	100% Percent complete	100%	<b>Achieved</b>

## Comments:

- The upgrade of SAP Business Objects to version 4.2 was completed by April 1st. (Dimuthu Tilakaratne, 09/03/20)

13.3.5 Review, obtain approval for and deploy a shared metadata solution for the System (DS)	07/01/18, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 11/17/20
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## Comments:

- The Data Cookbook with the university data warehouse data system has been deployed. (Dimuthu Tilakaratne, 11/17/20)

13.3.6 Implement netID authentication for Data Warehouse (DS)	07/01/18, 10/30/19	100% Percent complete	100%	<b>Achieved</b> As of 09/12/19
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## Comments:

- The netID authentication was deployed on 9/12. (Dimuthu Tilakaratne, 09/03/20)

13.3.7 Enhance operational academic registration data available from the data warehouse and universes (DS)	08/01/19, 06/30/21	100% Percent complete	50%	<b>Off Target</b> As of 10/25/21
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## Comments:

- Resources had to be re-allocated to focus on COVID-related data processing and visualizations. Additionally, unexpected work on the Source2Pay project that was raised to a higher priority has delayed projects on this type of data. (Dimuthu Tilakaratne, 10/25/21)

**13.4 Advanced analytics capabilities (DS) (06/30/21)****Measure:** Percent complete

100%

**Achieved****Target:** 100%

## Comments:

- The environment and tools to enable Advanced Analytics solutions have been set up and all staff engaged in the effort have participated in multiple training programs. We continue to enhance staff skills as necessary. As the initial use cases are completed, we continue to engage with units to discuss future advanced analytics needs. The first use case we worked on performed text analytics on sponsored projects abstract texts submitted by PIs to automatically categorize the work being done. This saves at least 20 minutes per abstract over 3,000 abstracts a year that in the past had to be manually reviewed to aggregate the type of sponsored projects undertaken at the university. There has also been a strong interest in the procurement management area and the use cases there continue to be worked on and expanded. (Dimuthu Tilakaratne, 10/25/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
13.4.1 Initiate ITPC Advanced Analytics analysis project (DS)	07/01/18, 11/01/18	100% Percent complete	100%	<b>Achieved</b> As of 11/17/20
Comments:				
• We received approval from ITPC in October to gather use cases. (Dimuthu Tilakaratne, 09/03/20)				
13.4.2 Complete ITPC advanced analytics analysis project (DS)	02/01/19, 09/30/19	100% Percent complete	100%	<b>Achieved</b> As of 09/12/19
Comments:				
• We have documented the use cases and written the final recommendation. (Dimuthu Tilakaratne, 09/03/20)				
13.4.3 Deploy advanced analytics solution and establish service (DS)	10/01/19, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 07/12/20
Comments:				
• The Sponsored Projects Abstract Classification solution was deployed, and the data was made available to clients through the data warehouse and existing universes. (Dimuthu Tilakaratne, 11/17/20)				

• We are testing tools and have begun development with an open-source solution called KNIME. We are also building our data science workflow as we develop our first solution. The workflow will be used to guide us on future efforts and inform clients on status. (Dimuthu Tilakaratne, 11/17/20)

13.4.3.1 Identify initial toolset (Dimuthu Tilakaratne)	07/01/19, 06/30/20	100% Percent complete	100%	<b>Achieved</b> As of 07/12/20
<i>Comments:</i>				
• After evaluating a set of tools like SAS, Alteryx and KNIME, we have decided to use KNIME since it meets the requirements of most of our use cases. If new use cases arise that KNIME cannot meet, we will re-evaluate. (Dimuthu Tilakaratne, 09/03/20)				
13.4.3.2 Procure tool (Dimuthu Tilakaratne)	01/01/20, 07/01/20	75% Percent complete	100%	<b>Achieved</b> As of 07/12/20
<i>Comments:</i>				
• KNIME Desktop and Server were procured. (Dimuthu Tilakaratne, 09/03/20)				
13.4.3.3 Deploy and Configure (Dimuthu Tilakaratne)	07/01/20, 11/01/20	100% Percent complete	100%	<b>Achieved</b> As of 07/12/20
<i>Comments:</i>				
• KNIME server has been deployed (Dimuthu Tilakaratne, 09/03/20)				
13.4.3.4 Establish service (Dimuthu Tilakaratne)	07/01/20, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 07/12/20
<i>Comments:</i>				
• We have decided to manage work by reviewing our current use case list gathered from the ITPC project and add use cases as necessary. Additionally, we have 3 client facing use cases in progress. We have also designed a roadmap for the future. (Dimuthu Tilakaratne, 09/03/20)				
13.4.4 Build team capabilities in Advanced Analytics (DS)	07/01/19, 06/30/21	100% Percent complete	100%	<b>Achieved</b> As of 10/25/21
<i>Comments:</i>				
• All staff participating in this effort have participated in multiple training programs. We will continue to build skills as necessary. (Dimuthu Tilakaratne, 10/25/21)				
13.4.5 Prototype an Advanced Analytics solution (DS)	07/01/19, 09/30/19	100% Percent complete	100%	<b>Achieved</b> As of 11/07/21
<i>Comments:</i>				
• We completed prototypes in text analytics using the Stanford Topic Modeling Toolkit. We were able to classify sponsored projects abstracts and TEM notes to identify common themes. (Dimuthu Tilakaratne, 09/03/20)				

**13.5 Investigate next generation solutions to enable streamlined and integrated data analytics including cloud hosted options (DS) (06/30/21)**

**Measure:** Percent complete  
**Target:** 100%

75%

**Off Target**

*Comments:*

• We reviewed over 30 vendor tools to build an understanding of next-generation data analytics tools. We then facilitated a Systemwide requirements gathering effort and generated a comprehensive set of consolidated requirements and use cases. We are currently working on proofs of concept with vendor tools evaluating them against our requirements and use cases. We are near complete with the data virtualization proof of concept and midway through the data lakes/data warehouse proof of concept. We have also initiated work on the data visualization/report delivery and data movement proofs of concept. Our stakeholder group includes close to 100 members of the Universities and System Offices and a smaller but representative advisory group has been established as well. We have been flexible in our timeline for the effort to enable stakeholders to take the time needed to think about the requirements that are important to them and evaluate future solutions to their satisfaction as well. While we expected to have completed the project this year, we are 75% complete and expect to reach completion by February 2022. The ultimate goal is to develop a roadmap for the next-generation data analytics platform for the university. (Dimuthu Tilakaratne, 10/25/21)

SUPPORTING PROJECTS OR ACTIVITIES AND TASKS	START/END DATE	TARGET, MEASURE	ACTUAL	STATUS
<p>13.5.1 Data visualization and delivery platforms (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Based on the completed market scan and user requirements, we have begun work on proof of concepts with vendors to test their solutions against our requirements and use cases. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	07/01/19, 06/30/21	100% Percent complete	50%	<b>Off Target</b> As of 10/25/21
<p>13.5.2 Data Migration (ETL or ELT) solutions (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Based on the completed market scan and user requirements, we have begun work on proof of concepts with vendors to test their solutions against our requirements and use cases. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	07/01/19, 06/30/21	100% Percent complete	50%	<b>Off Target</b> As of 10/25/21
<p>13.5.3 Data Virtualization (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Based on the completed market scan and user requirements, we began evaluating vendor solutions against our requirements and use cases. We are nearing the completion of this work. Outstanding our performance testing and a legal agreement with one vendor before we can test their solution. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	07/01/19, 06/30/21	100% Percent complete	75%	<b>Off Target</b> As of 10/25/21
<p>13.5.4 Data Architecture (Database, Data Lakes, Storage, etc.) (DS)</p> <p><i>Comments:</i></p> <ul style="list-style-type: none"> <li>Based on the completed market scan and user requirements gathering, we are working on proofs of concept with vendors to test their solutions against our requirements and use cases. (Dimuthu Tilakaratne, 10/25/21)</li> </ul>	07/01/19, 06/30/21	25% Percent complete	50%	<b>On Target</b> As of 10/25/21

## 14 Grow and retain a talented workforce that's keeping up with industry changes and is committed to supporting the System's strategic priorities

### 14.1 Establish professional development funding to match higher education average levels (HCM) (06/30/21)

*Comments:*

The total professional development budget for FY22 reflects comparative average levels with higher education institutions. Funding was allocated for each AITS division based on current FTE. A percentage of the budget was also assigned to accommodate strategic initiatives across the organization. (Suzi McLain, 11/03/21)

**Measure:** Professional development budget average per person meets industry average

\$870

**Off Target**

**Target: \$1,200**

### 14.2 Improve professional development planning, tracking, and strategic impact assessment (HCM) (06/30/21)

*Comments:*

A new and improved method of planning and tracking professional development was established in October 2021. Utilizing Monday.com boards give us the capability to submit, review, approve, and track professional development opportunities for our staff, while monitoring allocated funds. We can strategically plan priority areas of focus for future professional development planning while ensuring the appropriate teams and individuals benefit from relevant training events. Many professional development opportunities are still virtual due to the continuing pandemic. (Leana Coffey, 10/21/21)

**Measure:** Completed professional development action and tracking aligned to strategy/initiatives/priorities

100%

**Achieved**

**Target: 100%**

### 14.3 Engagement (HCM) (06/30/21)

Comments:

• Employee engagement continues to be a high priority for AITS in FY22. A staff survey revealed approximately 47% of employees prefer to work fully remote and 48% prefer a hybrid work environment, leaving only 5% in the traditional “work from office” setting. Giving our staff the flexibility to choose their ideal work arrangement improves employee satisfaction, but also increases the importance of a robust employee engagement program. Utilizing platforms such as MS Teams enables employees to connect with colleagues in various ways. It is used professionally during team meetings, with many groups utilizing advanced capabilities to further interact. It is also used socially as employees share casual posts highlighting topics important to them on the “Just for Fun” and “Employee Wellness” channels. The Human Capital team routinely conducts pulse surveys at AITS business meetings to gauge how employees are handling the “new normal” work arrangements. Employees who chose to work in the office were thrilled to gather for a casual outdoor cookout in September 2021. Employee morale continues to be high as 16.3% of employees responded in our last pulse survey they are “enthusiastic” about working at AITS and 59.8% are “happy” to work here for a total of 76% giving a positive response. The Human Capital team continues to seek ways to make employees feel a part of the team, no matter their work location. (Leana Coffey, 10/21/21) (Cynthia Cobb, 11/03/21)

**Measure:** Positive impact on employee engagement as measured by quarterly pulse surveys and other methods

76% of staff are happy or enthusiastic about working at AITS.

**Achieved**

**Target:** We look to maintain or increase engagement and positive pulse survey results each year.

### 14.4 Strategic workforce planning (HCM) (06/30/21)

Comments:

• The Human Capital team is working with Decision Support to further analyze HR data to assess retirement risk and evaluate demographics of our workforce. We continue to meet quarterly with leadership team members to facilitate succession planning and assist with creating strategies ideal for all levels of risk plans. (Leana Coffey, 10/21/21)

**Measure:** Strategic workforce management plan complete and operational

100%

**Achieved**

**Target:** 100%

## 15 Continue to be an engaged partner across the System

### 15.1 Improve awareness of value AITS provides to the universities (TAM) (06/30/21)

Comments:

• AITS participates on numerous campus level committees and in campus collaboration events such as ITPF. We did not set a KPI for this goal, so we do not know at this point whether we’ve improved the awareness. (Cynthia Cobb, 11/27/2021)

**Measure:** Awareness of AITS KPI TBD

No KPI set, activity deferred

**Deferred**

**Target:** KPI not set

### 15.2 Continue to actively participate on university and system office committees and governance groups (AFM) (06/30/21)

Comments:

• There are dozens of operational groups at the university, regional and national level with AITS employee participants. Some of these groups include: Information Privacy Security and Compliance Council, Information Security Working Group, and UIC ITLC various committees, PAPP, Return to Office, Accessibility, Data governance efforts, ITSM. Our committee count in 2019 was 15. This year, in 2021, AITS had 109 representatives participating on more than 20 different committees. We are marking this as achieved for this period as this is a continuing activity. (Jenny Ehrthaller, 11/27/2021)

**Measure:** Count of committees and groups

20

**Achieved**

**Target:** > 15 (2019 actual)

### 15.3 Continue to actively search and pursue collaboration opportunities (AFM) (06/30/21)

Comments:

• In FY20 and FY21 AITS collaborated with large programs including RPA for System Offices, Shield IL, Source2Pay, Accessibility, DR and BCP, TDX (ITSM), ITLT subcommittees, and we continued our normal committee, governance, and educational activities as noted below. (Cynthia Cobb, 11/07/21)

**Measure:** Count of collaboration activities

8

**Achieved**

**Target:** >3 (2019 actual)

**15.4 Participate in system-wide educational programs and seminars such as IT Pro Forum and Chicago Community Series (AFM) (06/30/21)**

**Measure:** Count of presentations

21

**Achieved**

*Comments:*

- 21 presentations were completed in FY21 by AITS staff at these events. We are marking this as achieved for this period as this is a continuing activity.  
(Cynthia Cobb, 11/07/21)

**Target:** Not set

**15.5 Continue to provide professional training, workshops, and development activities in areas such as process improvement, project management, and decision support topics (AFM) (06/30/21)**

**Measure:** Count of individuals trained

512

**Achieved**

*Comments:*

- During FY20 and FY21, the PMO was forced to pause training as we were pulled onto various emergency projects. Despite this, AITS provided training for over 500 staff.  
(Cynthia Cobb, 11/07/21)

**Target:** 500

# THANK YOU

AITs would like to thank all of our dedicated partners across the University of Illinois System whose daily contributions allow us—**together**—to meet our goals and deliver on our commitment to continuous improvement of our customer experiences.

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