IT Forum

Moderator: Pam Lombardo, Director EH&S
January 8, 2013
Welcome and Introduction

Ron Cortez
Associate Vice Chancellor – Administrative Services
Administrative Services
Program Management Office
Project Update

Brian Richard
Four Systems

- Financial System
- Timekeeping (Kronos)
- UCPath
- Procurement Gateway
Timekeeping KRONOS: Draft Timeline

Wave 1
Nov 2012
Academic Senate • Some College Dean’s Offices • Chancellor’s Office • ITEC • TELE • Institute for Terahertz Science and Technology • Institutional Advancement Division • Library • Summer Sessions

Wave 2
Dec 2012
Academic Programs (EAP & Extension) • Athletics • College of Engineering (Dean’s Office) • College of L&S (Social Sciences, Humanities & Fine Arts, Academic Advising) • Earth Science • OP EAP • Faculty Club • ISBER • Office of Information Technology • IS&C • Ombuds • NRI

Testing
Jan 2013
Neuroscience Research Institute • Department of Environmental Studies

Wave 3
Feb 2013
System-wide EAP, IS&C, Ucen (Bookstore and Admin), parts of Student Affairs, (additional departments being added)

Additional Waves
Mar 2013
TBD
UCSB personnel have been actively participating in UC and campus-level committees throughout this process.

UCSB will complete the transition to UCPath on October 1, 2014.
Gateway: **Goal**

- Implement SciQuest
- Standardize purchasing processes
- Leverage collective buying power
- Save money
Communication

Website

www.pmo.ucsb.edu

Newsletters / D-List Memos

Email direct or anonymously via website
805.893.4105 • Brian.Richard@pmo.ucsb.edu
805.893.4219 • Matthew.Erickson@pmo.ucsb.edu

Facebook

Twitter

Departmental and staff

- UCPath Business Process Team (8.29.2012)
- UCPath Info Session for Extension/Summer Sessions (9.7.2012)
- UCPath Campus Advisory Committee (9.14.2012)
- Housing & Residential Services Town Hall (9.18.2012)
- UCPath Info Session - Morning (10.8.2012)
- UCPath Info Session - Afternoon (10.8.2012)
- UCPath Info Session - Morning (10.15.2012)
- UCPath Info Session - Afternoon (10.15.2012)
- Division of Research ORU Business Officer Meeting (10.16.2012)
- College of Letters & Science Chairs Meeting (10.17.2012)
- Division of Student Affairs Directors Meeting (10.18.2012)
- Chancellors Staff Advisory Committee (11.8.2012)
- Academic Business Officers Group (11.15.2012)
Administrative Services
IT Reorganization and IT Approach

Doug Drury, Ben Price, Brian Richard
Administrative Services

IT Governance

- Establish Budgetary Guidelines, Allocations
- Provide Campus and System Perspective to Strategic Direction

Campus IT Governance
- Collaborate on Strategic Concepts to Assess Feasibility
- Provide Feedback

IT Governance Board
- Chair – CTO
- Members – Department Directors
- Provide Resource, Feasibility Estimates
- Provide Status
- Communicate, inform, collaborate

IT Leadership Team
- Co-Chairs – AR/T Director, CTO, PMO Director
- Members – Selected Division IT Staff
- Prioritize, Approve, Monitor IT Investments
- Provide Budgetary Recommendations
- Provide Strategic Direction Recommendations
Administrative Services
IT Reorganization
Administrative Services
IT Approach

• Establish The Vision: Division governance structure will establish Administrative Services strategic IT vision and priorities. Campus governance structure will likely influence division governance structure

• Achieve The Vision: Administrative Systems PMO office will execute IT strategies using Division, UC and industry best practices for project management and system implementation. Division system engineering standard practices and procedures will be based on SEI and ITIL best practices

• Support The Vision: ARIT will provide lifecycle support and evolution based upon Division, UC and industry best practices. Division lifecycle support standard practices and procedure will be based upon ITIL best practices
Administrative & Residential Information Technology

- Administrative & Residential Information Technology (ARIT) is responsible for campus wide Enterprise Systems support and maintenance following the successful system implementation by the Administrative Services Program Management Office (PMO).

- PeopleSoft Financial System
- Kronos/UCPath
- UCSB Gateway eProcurement
Administrative & Residential Information Technology

- The ARIT organization is comprised of the following groups, providing IT resources for all departments of the UCSB Division of Administrative Services:
  
  - **Application & End User Support** (i.e. Line of Business Applications, IT Help Desk)
  - **Technical Infrastructure** (i.e. Server, Database, and Storage)
    - De La Guerra Data Center
    - North Hall Data Center
  - **Network and Security Infrastructure** (i.e. Fiber, Ethernet, Wireless, Firewall, IPS)
Campus IT Governance
The Information Technology Council

Tom Putnam
Campus IT Governance Structure

- Desired Outcomes:
  - A new IT governance structure
  - Works within our distributed IT infrastructure
  - Promotes greater coordination, communication, and support of the campus IT goals.
  - An outgrowth of the campus-wide Operational Effectiveness Initiative
Recognize Centers of Expertise

- Distributed across multiple IT organizations
  - Build communication and decision structures
  - Align IT planning with campus strategic objectives
- Ensure coordination of and confidence in shared, enterprise-wide IT efforts
- Enable distributed innovations and operations
- Contributing to overall IT service excellence
IT Council Reporting Structure

- IT Board
- IT Council
  - Working groups
  - Centers of expertise
## IT Council Membership

<table>
<thead>
<tr>
<th>Office</th>
<th>Seats</th>
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</thead>
<tbody>
<tr>
<td>Executive Vice Chancellor</td>
<td>5  (Proportionally allocated among business, academic, and technical representatives)</td>
</tr>
<tr>
<td>Administrative Services</td>
<td>2  (1 Business, 1 Technical)</td>
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<tr>
<td>Student Affairs</td>
<td>2  (1 Business, 1 Technical)</td>
</tr>
<tr>
<td>Institutional Advancement</td>
<td>1  (Business or Technical)</td>
</tr>
<tr>
<td>Research</td>
<td>1  (Business, Academic, or Technical)</td>
</tr>
<tr>
<td>Chancellor</td>
<td>1  (Business, Academic, or Technical)</td>
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# IT Council Membership

<table>
<thead>
<tr>
<th>Name</th>
<th>Title and Department</th>
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<tbody>
<tr>
<td>Lubo Bojilov</td>
<td>Executive Director &amp; CTO&lt;br&gt;Student Information Systems &amp; Technology</td>
</tr>
<tr>
<td>Doug Drury</td>
<td>Director Administrative Services IT&lt;br&gt;Administrative Services Information Technology</td>
</tr>
<tr>
<td>Chuck Haines</td>
<td>Director, Capital Development&lt;br&gt;Budget &amp; Planning</td>
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<tr>
<td>Karen Hanson</td>
<td>Assistant Vice Chancellor for Research&lt;br&gt;Office of Research</td>
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<tr>
<td>Dick Kemmerer</td>
<td>Professor&lt;br&gt;Computer Science</td>
</tr>
<tr>
<td>John Longbrake</td>
<td>Associate Vice Chancellor for Public Affairs&lt;br&gt;Office of Public Affairs</td>
</tr>
<tr>
<td>Bill McTague</td>
<td>Executive Director, Resource Planning &amp; IT&lt;br&gt;Office of the Vice Chancellor for Student Affairs</td>
</tr>
<tr>
<td>Tom Putnam (Chair)</td>
<td>Associate Vice Chancellor for IT and CIO&lt;br&gt;Office of Information Systems and Technology</td>
</tr>
<tr>
<td>Lisa Sedgwick</td>
<td>Executive Director for Academic Affairs&lt;br&gt;Office of the Executive Vice Chancellor</td>
</tr>
<tr>
<td>Martin Shumaker</td>
<td>Director, Business &amp; Financial Planning/ CFO&lt;br&gt;Housing Central Services</td>
</tr>
<tr>
<td>Denise Stephens</td>
<td>University Librarian&lt;br&gt;Library</td>
</tr>
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Establish Processes

- Establish a process for people to identify enterprise IT needs to the council
- Develop guidelines for IT Council involvement
  - Enterprise impact, need for coordination
  - Adds value, not weight
- Manage the life cycle of standing and ad-hoc working groups and subcommittees
- Maintain a definitive campus list of IT projects
- Communicate frequently with constituents
Cloud Hosting
Successful Vendor Selection
and Contract Startup

Brian Richard, Ben Price, Bruce Miller
Hosting

• What we did and why
• Goals of the RFP process
• Areas to consider in RFP Statement of Work
• UC Policy
Goals of the RFP process

• Clearly define requirements and expectations
• Eliminate ambiguity
• Set up the vendor for success by providing the best information and background
• Allow vendor flexibility to respond with the type of solution they are best able to provide
• Allow University to perform most equitable comparison of services and costs
• Clarity and Transparency of Process
Areas to consider in RFP Statement of Work

• General Information to assist the responder - scope, background, methodology, schedule
• Contractor Personnel - qualifications, expectations, right to remove, travel, notification
• Intellectual Property, Protection of information, Data Ownership
• University Furnished Property versus Contractor Furnished Property (e.g. licenses)
• Functional Requirements – including test environments
• Access Requirements – network access, authentication
• Security, Encryption, Monitoring, incident notification, log reviews, scans
• Service Level Agreements (SLA) and deliverable expectations
• Data Recovery, Restoration, Retention, Contingency Planning and Disaster Recovery
• Implementation/Transition Management Requirements
• Maintenance and Support Requirements
• Configuration and Change Management Requirements – coordination and deferral
• Reporting requirements for SLA and contract performance
• Cost Management Requirements – Estimates, Approvals, Invoicing and Detail.
• Terms and Definitions, references to relevant UC Policy and requirements
UC Policy

University of California Business and Finance Bulletins – IS Series

- IS-2: Inventory, Classification, and Release of University Electronic Information (rev. 5/18/11)
- IS-3: Electronic Information Security (rev. 2/3/11)
- IS-10: Systems Development Standards (rev. 5/18/01) – includes RFP advice
- IS-11: Identity and Access Management (7/27/07)
- IS-12: Continuity Planning and Disaster Recovery (7/27/07)

BUS-43, Appendix DS, Additional Terms and Conditions - Data Security and Privacy

HIPAA and PCI Compliance
UCSB Hosted Financial System Implementation

- Hosting Provider Technical Contact and Coordination
  - BUS-43 – Appendix DS compliance
  - Secure network topology and setup (IPSec 3DES)
  - Authentication model and Access privileges (LDAP / AD)
  - Setup all Non-Prod Service instances (Demo, Dev, Test)

- UCSB North Hall Data Center
  - Cisco ASA 5525-X Pair to provide:
    - Secure site-to-site VPN to Hosting Provider (IPSec 3DES)
    - Secure UCSB Staff Developer access to Financial System Support Systems
UCSB Hosted Financial System Network Topology
Connect Project Update

Jamie Sonsini
Office of Information Systems & Technology
January 2013
What is Connect?

Microsoft Office 365 at UCSB

Services in the Microsoft “cloud”

Services and Support at UCSB

Phase 1 – H1 2013

Phase 2 – To Be Discussed
The Road to Here?

IT Planning Group
Calendar Work Group
October 2010
Report to IT Board
January 2012
Proof of Concept Group
July 2012
Report to IT Board
July 2012
Phase 1 Connect Users

- **All-In (OIST I-Mail & IC-Dept Email Users)**
  Use Connect for Email & Calendaring
  Migrate Email to Connect

- **Calendar-Only (Oracle Calendar-Only Users)**
  Use Connect for Calendaring (only)
  Use Departmental Email Service

- **Cross-Calendar**
  Administrative Services, Student Affairs, & Communications Services
Phase 1 Connect Features

Email

Calendar

Contacts

Tasks
Connect Support

- **Departmental Support**
  Tier 1 Support

- **Service Support Group**
  (Admin Services, OIST & Student Affairs)
  Tier 2 Support
  Tenant Administration*

* Sharing U-Mail Tenant Administration
Campus Coordination

- **Connect Governance Group**
  https://it.ucsb.edu/groups/cgg

- **Connect Technical Coordination Group**
  https://it.ucsb.edu/groups/ctcg

- **ConnectTech-L Listserver List**
  88 Subscribed
From Here...

- **General User Presentations**
  - Introducing Connect – Nov 2012
  - Department Presentations – Available Now
  - Mar 2013: Calendaring and Scheduling with Connect

- **Technical Presentations**
  - Connect Client Options – Oct 2012
  - Feb 2013: Email & Calendar Migrations

- **Visit:**  WWW.CONNECT.UCSB.EDU
Break