IT Directors Meeting Notes: April 6, 2018
1:00-2:30 pm
375 McKenzie Hall

Voting Member | Area Represented | Present (Y/N)
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Jessie Minton | CIO/Vice Provost for Information Services | Y
Shandon Bates | Lundquist College of Business | Y
Dennis Bishop | School of Law | N
Jim Bouse | Enrollment Management | Y
Duncan Barth | UO Libraries | Y
Chris Butler | Athletics | Y
Guy Eckelberger | School of Music and Dance | Y
Ben Brinkley | College of Arts and Sciences | Y
Nick Maggio | Research, HPC | N
Mark McCulloch | Business Affairs | Y
Kevin McGlinchey | Campus Operations | N
Mark Miller | Finance and Administration | Y
Cleven Mmari | Student Life | Y
Charles Powell | Research Office | N
Gary Sullivan | A&AA/SOJC | Y
Kevin Williams | University Advancement | Y
Jeff Woodbury | Education | Y
Patrick Chinn, Ex-Officio | Information Services | Y
Noreen Hogan, Ex-Officio | Information Services | N
Leo Howell, Ex-Officio | Information Services | Y
Kristin Smith (ex officio, note-taker) | Information Services | Y

Guests: Jeff Jones, Russell Rubrecht, Eric Fullar, Susan Bowman, José Dominguez, Andy Vaughn

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| UC Project Update - Eric, Russell, and Susan | • The UC project team gave an update on the project.  
• **Current state**: There are 6500 phones and 292 life safety phones on campus, providing voice, conferencing, IM/presence, unified messaging, collaboration and call center services. Looking at a campus-wide platform for all services.  
• **Risks of no changes**: Current system is reaching end of life and end of support. Staying with Avaya does not get the efficiencies needed. | |
### Next Steps:
A needs assessment began in 2017. Ready to release an RFP to hire a UC consultant. Consultant will assist in completion of the needs analysis, design platform architecture, provide guidance selecting a vendor, and assist with the technical implementation. Expected to be a long-term engagement.

### Features requested:
Greater integration among communication tools, full-featured mobile integration, feature parity across all platforms, robust and easy to use secure web conferencing/screen share tool, and voice message transcription.

### Questions/comments:
- Yes, slides can be shared with units
- Will probably not stay with Avaya. Their focus is changing and does not align with the university’s needs.
- Are we integrating solutions that are already in place? Unsure, the consultant will provide guidance.
- Did the needs analysis take into account the way people use services? Yes, understood that people do not want to be tied down.
- Are the UC and email teams working together? Yes, working with Jeff Jones.
- What is the timeline? There is a hard timeline of 3 years for the telephone replacement portion of the project. Would like to have a consultant selected within 90 days.
- What is the cost model? Need an in-depth assessment of the market. The use case is different in every unit, will need to change the charge model.

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### Campus Email Project Update

- The campus email project officially kicked off on 3/1/18. Susan Bowman is the PM; currently recruiting across campus for the project team.
- Requirements gathering needs and wants:
  - **Needs:** Litigation hold compliance, records retention, litigation hold & public records self-service, and enhanced security requirements.
  - **Wants:** Student email for life (alumni forwarding), reduced duplication of services (email and calendaring), universal user experience, and a consolidated collaboration platform.
- Campus currently has two centrally offered email systems, Exchange 2013 and IMAP/Webmail.
- Guiding principles moving forward: Need a smooth transition; a 4-year attrition model for students, and reasonable, adequate time for staff/faculty. Also looking at feature enhancements that provide more value to end users.
- Future: Move all staff/faculty/students to Exchange online, cloud based email and calendaring platform. Provides 50 GB mailbox, is fully cloud based (not reliant on campus infrastructure) is litigation hold compliant, allows public records self-service and enhanced security features
- **Next steps:**
  - All: Contact Jeff Jones with any questions.
1. Alumni email forward, June 2018.
2. Migration off IMAP to Exchange
3. Begin user provisioning directly into Exchange online. This is when the 4-year timer begins.
4. Begin the on premise Exchange migration. (Could happen sooner than later.)
5. Remaining email migrated to the cloud
   • Questions:
     o Will device scanning change? Currently uses SMPT, no changes right now. The team will look into this.
     o Is there any reason not to put people in Exchange right now? The team is prepping the environment, exploring the possibility. Right now, there is no capacity for IMAP to an on-prem solution. New students go to Exchange online, existing stay on IMAP for 4 years. Downside is having students on 2 different platforms.
     o How will this change for Emeriti? They will be grouped into the last category. The experience is identical to exchange on-prem.
     o Is there an option for older students to move to Exchange online? Yes, there is an opt-in. All students currently have O365.
     o Once people are in the cloud, will they have additional functions? Yes, other features open up.
     o What about list administration? Not in scope for this project.
     o Is there LTI (Learning Tools Interoperability) for Canvas? The team will look into this.
   • Email proposal has been presented to the SLT, and has the support of both the president and the provost. The team is working on a communication to campus.

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### CRM

- CRM project was presented to the SLT, and has the support of the president and provost to move forward. However, the team does not want to move forward without investing in ongoing staff to support it well across campus.
- There are different CRMs currently used across campus, will need to think about integration of those into a new model.
- Next steps: RFP to the Deans for feedback by 4/20, publish by 5/1. When costs are known, will communicate to units.

### Updates

- Mark McCulloch: Concur went live 3/27; they just processed the first reimbursement. Traveler trainings are scheduled for April, in large forums. (Training will be recorded.) Reminder: your name must match your passport in Banner; if it doesn’t, must make a name change in Banner.
- Questions:
  o What if you are already a TripIt Pro user? Both TripIt Pro and the Concur app are free to download. Users are able to link the two through the website (not through the app.)
### EAB Presentation

- Can set up multiple approvers
- Can allocate your expenses to different projects/trips.

**Duncan Barth:** Will be attending the IT Directors meetings as the interim Director of Library Services. The search for new director is underway; Sara B. has retired.

### UO has an EAB (Educational Advisory Board) membership, which gives all faculty and staff access to their services. Each person needs his/her own account; information is available at eab.com. Once an account is created, members have access to the IT Forum, webinars on demand, on-site presentations, the daily briefing, newsletters, and all research.

- Best-practice research: Available on many topics, including metrics that are actionable, replicable, scalable and quantifiable.
- IT Forum: Presents lessons from shared challenges across the industry. Research agenda for ’17/18 included enterprise integration, organization and talent, risk management, data and analytics. This year the focus is on metrics.
- Four areas of expertise: Becoming a data informed institution, information security and awareness, IT management and leadership, and diagnostic support.
- Functional collaborative: Group of peers hold webinars to discuss what research they are interested in, problems they are facing right now. Then the EAB does research on that topic. Provides the ability to network with people in other institutions, customized research.

### Questions:

- How much detail do you get into with EAB research? If members have a specific ask, they have a service called ask-EAB. Members are always welcome to call as well.

### All: Email Kristin if you need help setting up an account.

**Recorder:** klsmith