Why Kuali?

Why consider a change?
- The regulation is ever-evolving and needs to be updated and enforced.
- The current system is outdated and inefficient.
- The current lack of transparency and accountability.
- The need for increased collaboration among stakeholders.

What have we accomplished so far?
- Kuali Foundation Established
- Kuali Core Services in the Cloud (Beta)
- Kuali Foundation governance model
- Kuali Core Services in production
- Kuali Foundation community growth

What are the next steps?
- Implementing Kuali in production
- Enhancements to core Kuali services
- Collaboration with the Kuali community
- Continuous improvement and innovation

It’s not so much about how much we spend or invest, it’s all about HOW and WHERE we CHOOSE to invest.
I'm a little confused?

- How much will we spend on Kuali over the next 5-10 years?
- The PS contract is about 1.2 million. Is it increasing or decreasing?
- Why are we implementing Kuali Student when products like KFS and Coeus are far more stable and mature?
- Why does the CIO keep referring to implementations and upgrades at the University of California System and the University of Minnesota? Is he just trying to scare us?
- Is the PeopleSoft HR/Student Split on the UIT project list?
- Are we implementing KSAP and Registration on PS tables? Why?
- Why not just keep developing our own home-grown custom Java applications?
- Won't we just have to customize Kuali like we did PeopleSoft?
Why consider a change?

• The PeopleSoft contract is expiring and needs to be evaluated and re-negotiated.
• The cost of ownership of administrative applications is increasing.
• We have new leadership at the University and in UIT which is leading to a new culture and new strategic directions.
• Our customization level and evolutionary architecture are resulting in increasing break-fix and failure points.
What have we committed so far?

- Kuali Foundation Membership.
- 1 FTE commitment to the Kuali Rice Project.
- Kuali Student (KS) "Founder" level investment - 10 FTE commitment to KS product development.
- Human Resources doing a proof of concept for Kuali Time & Attendance.
- OITC direction to implement Kuali Student Academic Planner and Registration.
What are the next steps?

• Implement KSAP and Registration.
• Evaluate Kuali Financial System (KFS) and Coeus as options for our financial systems application strategy.
• Evaluate Kuali Human Resources (KPME) as an option for our human resource application strategy.
• Complete Kuali Time & Attendance proof of concept and establish direction for Time & Attendance.
• Plan and prepare for the PeopleSoft Student/HR split and subsequent HR upgrade to version 9.2.
• Evaluate KS Curriculum Management as an option for our curriculum application strategy.
• ...
Business Rules
Data Models/Engine
UI/Presentation Layer
Tools & Architecture
Community Source

Think of it as selecting a toolkit and infrastructure on which we can build and adopt new solutions rather than selecting a suite of applications from a vendor.
It's not so much about how much we spend or invest, it's all about HOW and WHERE we CHOOSE to invest.
Why Kuali?

It's not so much about how much we spend or invest, it's all about HOW and WHERE we CHOOSE to invest.
Update on Service Management Platform

UIT Top 5 – Fall 2013

1. UIT Cost & Funding Model
2. Kuali Student Implementations
3. Service Management Platform
4. Process Analysis & Design
5. Identity & Vulnerability Management
Building a service culture
Service Management

- Necessary capability for UIT
- Embraces the ITIL framework
- NEEDED: a service management platform
ITSM Platform

- Services
  - Catalog
  - Cost definition & funding model
- Customer self-service
- Order fulfillment processes
- Incident, problem, and change management
Why this tool?
- ITSM-based
- Modular design
- SaaS
- Significant higher ed uptake
  - Yale, UCLA, Ohio State, Emory, BYU
- Will help us deliver better customer service
- Will help us rethink how we design and deliver services
Early rollout

- July 2013: Service fulfillment, KB articles beta test
- Service provider experience
- Customer experience
our SMP tool

- Beta services available
  7/1/13
  - Call recording
  - Classroom technology installation
  - Department VPN
  - File storage
  - Firewall change
  - IP address management
  - Load balancer
  - Network change
  - Virtual server
  - Wireless monitoring
## Service fulfillment

<table>
<thead>
<tr>
<th>Item</th>
<th>Opened</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom Technology Installation</td>
<td>Aug-27-2013 03:23 PM</td>
<td>Oct-21-2013 04:23 PM</td>
</tr>
</tbody>
</table>

### Stage

- **Approved**
- Waiting for Quote (Completed)
- Waiting for Equipment (Completed)
- Waiting for Installation (In progress)
- Waiting for Customer Approval (Pending - has not started)
- Completed
"My experience has been good so far. ServiceNow has made improvements to its UI. It is more intuitive and easier to understand. Overall, the experience for the front end user is improved by removing a lot of the guesswork”

Elliot Fenech, Common Infrastructure Services
Your process + our platform yields an improved customer experience
“We moved from one building to another, so we needed to activate ports. I think I did it three or four different times. The first time I called the Help Desk and she walked me through it, but then when I went back in again it was very self-explanatory.”

Vicki Skelton, Neurosurgery supervisor
The Plan
Here’s what is coming up ...

**Service Catalog**
- Service Definition
- Governance approval
- Related services, KBs identified
- 60+ Services to be added
- 90 days

**Service Fulfillment**
- Fulfillment process work
- Optimize process and build workflows into SMP
- Reports
- Status
- 120 days

**Knowledge Articles**
- Refine existing articles
- 250 distilled from 750
- Create new articles as needed
- 120 days

**Manage Incidents**
- Process work
- Identify integration needs
- Optimize & build workflow into SMP
- Build UI for customer experience
- 150 days

**Problem, Change, Configuration**
- Problem Management
- Change Management
- Configuration Management
- Dates TBD
Integration Plans

- ITS will continue to use ServiceDesk
- UIT ordering will be done through ServiceNow
- UIT and ITS will collaborate on integration approach
- Integration objectives
  - Incorporate process analysis from outset
  - Minimize duplicative operational work
  - Minimize integration development and testing
  - Minimize cost
What’s next?

• Service catalog & fulfillment
  - Workshops to refine service definitions & fulfillment workflow
  - Build services and workflow into the SMP
  - 60+ Services
What’s next?

• Knowledge base
  - Refine existing KB articles
  - Define and add new articles
  - 250+ articles
What’s next?

- Incident management
  - Replace current ServiceDesk workflow
  - Release beta early 2014
And then …

• Problem management
• Change management
• Configuration management
Thanks to the SMP team

Rob Birkinshaw
Jill Brinton
Jasmin Davis
Shellie Eide
Elliot Fenech
Bill Johnson
Earl Lewis

Scott Lloyd
Steve Maloy
Paula Millington
Peter Panos
Chris Pfeiffer
Josh Wall
Service Management
A key capability for UIT
What is it?

- SMP is a key strategic driver for UIT
- ServiceNow is the chosen tool for SMP
- ITS will continue to use ServiceDesk
- UIT and ITS will collaborate on integration approach
- Integration objectives
  - Incorporate process analysis from outset
  - Minimize duplicative operational work
  - Minimize integration development and testing
  - Minimize cost
What is the plan?

• Many UIT staff have attended ITIL training
• SMP is the next logical step in the adoption of ITIL
• ServiceNow - integrated platform designed specifically to support ITIL framework
• Will help us deliver better customer service
• Will help us rethink how we design and deliver services
• We've stumbled but quickly getting back on track
What is the plan?

- Service catalog
- Service definition workshops
- Josh Wall scheduling these with service owners
- Get services into the SMP
- Knowledge base
- Cleanup what's there
- Add things that we need but aren't there
- Incident management
- Get baseline replacement for ServiceDesk running
- Go-live early next year (Jan-Feb 2014)
- Problem, change and configuration management are next
Building a service culture
Building a service culture
IT Service Management

Design
- Vendor Management
- SLA
- Service Catalog
- Availability

Build
- Configuration
- Testing and Validation
- Release & deployment
- Knowledge Management
- Change Management

Run
- Incident Management
- Event Management
- Problem Management

ITSM
Communication Update

UIT Strategic Communication Group
Office of the CIO

Cassandra Van Buren
Associate Director

Scott Sherman
Communications Specialist

Open
Communications Specialist
(posting position in a few days)
December 2013

StratComm unit created
• As-is assessment
• Good work to praise
• Room for improvement
  • Reactive
  • No central comm strategy, coordination
  • Un(der)trained communicators
  • Not often aligned with UIT strategic initiatives, goals
  • Email-centric, confusion of lists
  • Inability to effectively target audiences
  • Website content out-of-date, incorrect; design not UX friendly
  • Little/no use of social networking platforms
Progress – 11 months

StratComm = communicate, reinforce UIT’s organizational mission, strategy, goals

- UIT-wide comm strategy, orchestration, consulting, training & tools, iterative improvement
- Internal and external communication
- Strategic vs. operational
- StratComm planning group formed
  - Reps from all service units
Progress – 11 months

UIT Outage Channels

- Email lists (ITP, Network Outages)
- Twitter [https://twitter.com/UofUIT](https://twitter.com/UofUIT)
- Facebook [https://www.facebook.com/pages/UIT-University-of-Utah/334174539957315](https://www.facebook.com/pages/UIT-University-of-Utah/334174539957315)
- Reddit [http://www.reddit.com/user/UofUCampusIT](http://www.reddit.com/user/UofUCampusIT)
- Google+ [https://plus.google.com/113615309196043595853/posts](https://plus.google.com/113615309196043595853/posts)
- Webpage [http://it.utah.edu/services/networking/outages.html](http://it.utah.edu/services/networking/outages.html)
- Yammer [https://www.yammer.com/uofuitprofessionals/](https://www.yammer.com/uofuitprofessionals/)
- Twitter [https://twitter.com/CHPCOutages](https://twitter.com/CHPCOutages)

Research IT

- Twitter [https://twitter.com/ResearchIT_UofU](https://twitter.com/ResearchIT_UofU)

Center for High Performance Computing (CHPC) Updates

- Twitter [https://twitter.com/CHPCUpdates](https://twitter.com/CHPCUpdates)

Teaching and Learning Technologies

- Facebook [https://www.facebook.com/uofult](https://www.facebook.com/uofult)
- Twitter [https://twitter.com/uofult](https://twitter.com/uofult)

Operational comm improvements

- Regular org chart updates & change highlights
- Outage comm (IRT, incident, CAB, planned)
  - StratComm handled for past 11 months
  - More streams, more comm
  - IT Professionals list civil, more professional and productive
Coming Up

Upcoming operational comm changes

• StratComm to re-focus on strategic level
• BlackBoard Connect as IRT, incident comm tool
Progress – 11 months

Strategic Comm improvements, projects

communicate, reinforce UIT’s organizational mission, strategy, goals

UIT Values

Transparent
Collaborative
Responsive
Accountable
Reliable
Progress – 11 months

Strategic Comm improvements, projects

- Leadership group identified core values keywords
- Comm consulting, planning, implementation
- Comm plan for faculty & academic admin re: UIT, IT governance
- Internal communication plans for service units
- Budget Book – systematic cataloguing of milestones
- Special comms
  - Crisis comm, personnel changes, DMails, threat comm, special reports, papers, memos, policy changes
- Press releases, media relations
- All Hands comm
- Surveys
- Website strategy & maintenance – CIO & UIT
- Coordinate comm strategy with Service Management Platform group, UC, ISO, EHS, HSC PA, UMC …
Coming up

• UITL podcasts starting this month
• One-pagers, posters, other materials
• Monthly IT governance digests

**Node 4**

• columns, articles, pictures
• “thank you” section & prize drawings
  • E.g. Ute sports tix, UMFA Family Membership, Red Butte Garden tix, Kingsbury Hall tix …
Self-Serve Information

• Governance •

cio.utah.edu
portfolio group member rosters
meeting agendas
meeting summaries

• UIT newsletter/podcasts •

cio.utah.edu/node4

• Organizational charts •

it.utah.edu/leadership/orgcharts

• Other UIT information •

it.utah.edu
new website coming soon
Direct Communication

Discuss questions, concerns, and ideas

Find a mentor, be a mentor

UIT managers, associate directors, members of the UIT leadership group