




Business Operations Forum 9/18/18

- **IT Update** - Chip Lenno
 - **IT Contract Approval Process** - Mary Mauro & Jennifer Stone
 - **Security Awareness** - Mary Mauro
 - **IT Project Request and Approval Process** - Jennifer Stone
 - **IT Ticketing Application (Q & A)** - Pamela Cunha
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IT Update

- Current Projects

- Digital Signatures
- OASIS “upgrades”
- Windows 10
- Web Publishing

- Upcoming Projects

- CRM (Client Relationship Management)
- CSUMB App



IT Contract Approval

Technical Review by IT

- Need for a new process
- Issues and Risks IT is looking for include:
 - Accessibility
 - Data security (sensitive data)
 - Cost savings
 - Best practices
 - Potential impacts to IT resources (authentication, integration, support)
- [IT Contract Approval Service Page](#)



Review Process:

- **Technical Review Includes:**
 - Contract Review for any new or modified contract/service
 - CSU General Provisions
 - Voluntary Product Accessibility Template (VPAT)
 - Compliance with Accessibility laws
 - Data Security - Confidential & Sensitive Data ([link to KB](#))
 - IT Supplemental Provisions
 - IT Risk Assessment
- **IT Approval:**
 - Approved in TeamDynamix
 - BSS emailed approval with approved IT Supplemental Provisions
 - Requestor advised of approval



Requestor Steps :

Before submitting a new or modification to an existing contract:

1. Determine if the software of the service touches the campus IT network
2. Provide the following to the Vendor:
 - VPAT
 - CSUMB General Provisions
 - IT Supplemental Provisions *
 - IT Risk Assessment *
3. Collect from the Vendor:
 - VPAT (and IT Risk Assessment *)
 - List of any concerns with the General Provisions and /or IT Supplemental Provisions *
 - Vendor contract or agreement requirements with terms and deliverables
4. Complete IT Contract Review Form and attach:
 - VPAT (and IT Risk Assessment *)
 - Vendor contract
5. Provide clarification by replying to ticket requests via email, if necessary.
6. IT will:
 - Review Contract, VPAT and IT Risk Assessment
 - Finalize contract provisions and forward to BSS

* If sensitive data is involved



Security Awareness



- October is National Cyber-Security Awareness Month
 - Campus Security Awareness Campaign will Focus on Phishing, Phones, Passwords
- Physical Security (ICSUAM Policy 8080)
 - Don't Expose Yourself to Risk or Leave Your Property Unattended
 - Report Lost or Stolen Property and Campus ID Cards
- Security Training (ICSUAM Policy 8035)
 - SumTotal Transition from Skillport October 29
 - Data Security and FERPA
- Records Retention and Disposition EO1031
 - <https://www.calstate.edu/recordsretention/>
- PCI (ICSUAM Policy 8090)



IT Project Prioritization Process



- What is a Ticket versus what is a Project?
- Why implement this process?
- Summary of new process
- Roles and Responsibilities
- Timeline:
 - Fall Intake (9/4 - 10/1/18)
 - Spring Intake (1/7 - 1/31/19)



Does this apply to me?

- Service (Ticket):

- Updates or changes to **existing services**.
- Examples include: update or modification to an existing service, fix software, hardware, voicemail, on-line report.
- Request using IT Ticket.

- Projects:

- “A project is defined as a temporary endeavor undertaken to create a unique work product, service, or result” and is “an effort of work that is estimated to require a minimum of 24 human resource hours to complete.”
- Is it a **new service**? (e.g. new contract management software).
- Does it have a start and an end? (e.g. Onboard new department in OnBase so department can use workflow).

- Not Sure? Ask PMO staff (IT_PMO@csumb.edu)




Summary of New Process

- Two Intake Cycles for new projects (fall and spring)
- Submittal requirements:
 - TeamDynamix Form
 - Completed Scope
 - MPP/VP approval
- Project proposals are scored using rubric by the IT Project Steering Committee
- Resources and timelines are estimated by the PMO
- Scored projects are reviewed by the Cabinet and approved/denied
- Funding is identified
- Approved projects are implemented (spring and fall)




Why Implement a New Process?

- Create a transparent decision-making process
 - Ensure that projects necessary to achieve strategic goals get priority
 - Collaboration across campus
 - Ensure that limited staff time is allocated to high priority projects
 - Thoughtful planning and resource allocation for identified projects
 - Public reporting of project decisions and status
 - Improve workflow, efficiency and project deliverables.
 - Mitigate unapproved requests, first-come, first-served or over-committing staff
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When to Submit a Project Request to IT

- ERSS - review with SIS first
 - Finance & University Personnel - review with ASM first
 - Request a Pre-Meeting with the PMO to discuss first
 - Submit project approach is approved by appropriate MPP / VP
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Roles and Responsibilities



- **Everyone** – Think strategically about department direction and what information resources may be required in the next 6-12 months to achieve initiative.
- **Department staff** – discuss future project plans internally and work out details with technical resources (SIS, ASM, IT).
- **SIS & ASM**
 - Work with departments and identify projects that are internal and which will require IT resources.
 - Submit Project Requests for portions of larger projects that require significant IT resources.
- **PMO**
 - Pre-meetings
 - Manage project intake process
 - Project management for all approved projects
- **KB Article:** <https://csumb.teamdynamix.com/TDClient/KB/Edit?ID=61539>



Timeline

- 9/4 – 10/1/18 – Project Intake Period
- 10/1 – 10/22/18 – Projects reviewed by PMO, Requestors and technical staff
- 10/29 – 11/16/18 – Projects scored by IT Project Steering Committee
- 12/10 – 12/21/18 – Cabinet Review and approval
- 1/7/19 – Project implementation

NOTE:

Some small projects (e.g. relating to OnBase that do not require Cabinet approval may be scheduled earlier, if staffing is available).



IT Ticketing System Update

- [Navigation](#)
- Searching for correct ticket
- My Favorites
- [Ticket Requests](#)
- Questions: IT_PMO@csumb.edu



Questions?

[Cheat Sheet: Submitting-Tracking Tickets](#)

