



IT Projects Update Forum

Wednesday, August 19

1:00 – 2:00 pm

Agenda

1) Welcome and Structure

- 1) We will take a few questions after each update- post additional questions in Chat and we may need to post Q&A later if run short on time

2) General Overview: OneBadger CRM

3) Project Briefs:

- 1) VoIP Phase 2
- 2) Data Center Strategy



Deep Dive Project Update

OneBadger CRM Overview

OneBadger CRM Engagement Layer



Delivering on UW–Madison’s strategic initiatives will require a **personalized, seamless relationship ecosystem** that enables the full lifecycle of engagement for all lifelong learners.

With the right ecosystem, UW–Madison can create powerful, customized engagement with every learner at every step of their educational journey.



What the Future Can Be...

...for Faculty & Staff

A reliable, fast way to get a comprehensive picture of each learner's experience and a 360 degree circle of support

The screenshot shows a Salesforce interface for a student named Sophia Student. The dashboard is divided into several sections:

- Profile:** Sophia Student, Class of 2022, BS Computer Science. Last Advising Appointment: Fri, October 18, 2019.
- Alerts:** Open Alerts (5) and Resolved Alerts (8). A table lists open alerts with columns for Alert #, Priority, Type, Reason, Related, and Created.
- Insights:** A section titled 'Insights' with a 'Watch List' button and 'Top Factors' including LMS logins, Absences, New Alerts, Major, Adv. Appts., and Other factors.
- Contact Information:** Student ID, Email (sophia.student@wisc.edu), Phone (310-745-1188), Birthdate (5/15/1999), FERPA status, and Housing (On-Campus).
- Feed:** A section for sending messages via Email, Call, Chat, or Facebook.
- Recommendations:** A recommendation to 'Apply Probation Risk Success Plan Template'.

...for Learners

A personalized, seamless experience that begins with their very first UW–Madison interaction and continues throughout their learning journey

The screenshot shows the Sophia Student mobile app interface. The home screen features a welcome message, a search bar, and a 'SCHEDULE AN APPOINTMENT' button. Below this, there are sections for '3 Open Alerts' and an 'Agenda' showing 'Physics Office Hours' from 8:00 AM to 8:30 AM at the AMP LIBRARY.

Where We Started

2018

Division of Continuing Studies
Recruitment

- Marketing automation
- Single platform to complete tasks, receive alerts, access necessary data
- Scalable – more programs and users

Office of Admissions and Recruitment
Prospect Management

- Automated data matching and duplication processing
- Targeted marketing to prospects and applicants
- Processed approximately 100,000+ cases for support

2019

Growing Support for Salesforce



40+ groups across campus

“We have no idea how many collective issues a student may have. The issues may be across academics, housing, health services...and each department only knows its issues. How do we help a student who might really need our help?”

“We struggle to support individuals straight through from the time they’re a prospective student, then a student, then eventually an alum.”

“I’m working in Excel. There’s no easy way to get a big picture view.”

“It’s hard to see everything we need to know about a student. We have to have five interfaces open. Even that ends up not working.”

“If a student has a question about something outside my department, I have no way to warmly pass that student to the appropriate team and make them aware of the student’s concern. My students just repeat themselves over and over.”

2020 - Early Adopters Across Three Orgs

Salesforce Org

Clinical Placement



School of Education
UNIVERSITY OF WISCONSIN-MADISON



Salesforce Org

Strategic Partnerships



**Office of
Business Engagement**
UNIVERSITY OF WISCONSIN-MADISON



Shared DCS / OAR Salesforce Org

UW-Madison Online



Continuing Studies
UNIVERSITY OF WISCONSIN-MADISON

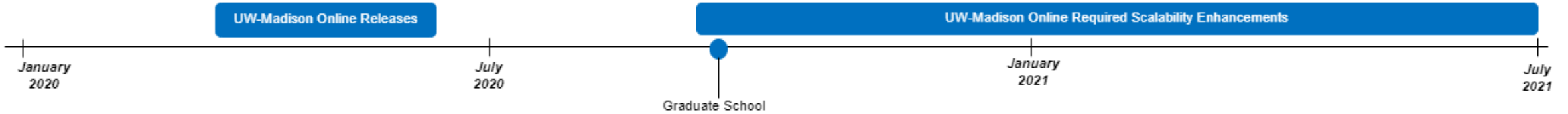


**Graduate School
Recruitment**

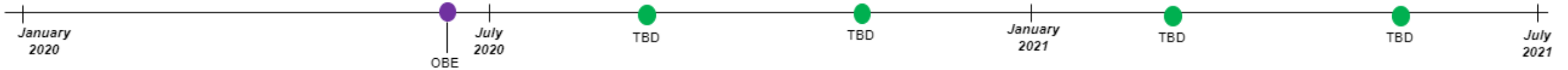


Salesforce Orgs and FY21 Timelines

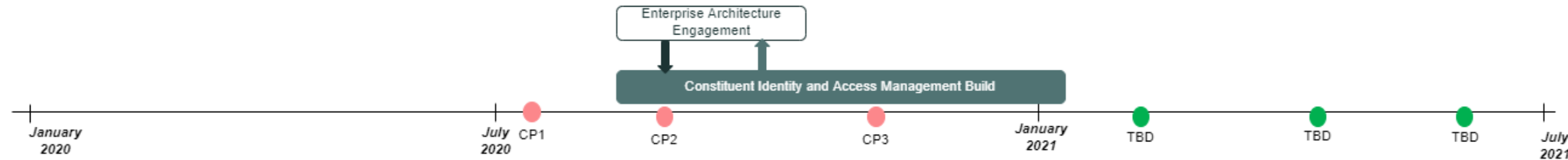
DCS / OAR (Recruitment)



OBE (Strategic Partnerships)

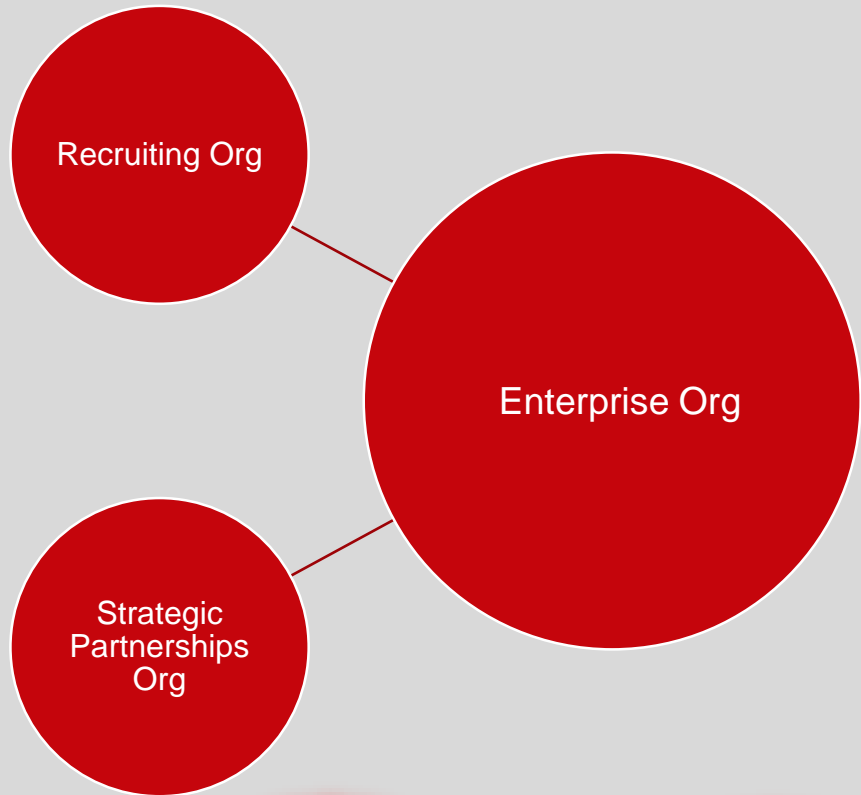


Clinical Placement (Enterprise and CIAM)



- School of Education enhancements and iSchool
- Additional groups TBD

CRM Enterprise Program – Future State



Enterprise Org Strategy Benefits:

- Shared data
- Simplified integrations
- Common processes
- Centralized administration and development
- Reduced cost (support, licenses)

All enterprise program plans are subject to budget approval

Evaluation
and
Readiness
Assessment

Governance
Model

Administrator
Support

Training

Change
Management

Q&A





Project Briefs

VoIP Phase 2

Data Center Strategy

VoIP Phase 2 and CloudFax Service

- Phase 1 Review
- Phase 2 Scope
- Update on CloudFax Service
- Life Safety and Alarm Lines
- Remaining Work



VoIP Phase 1 Review

- Voice over Internet Protocol (VoIP)
- Migration of analog AT&T Centrex to Cisco VoIP
 - Over 21,000 lines transitioned
 - Out-of-scope lines designated for Phase 2



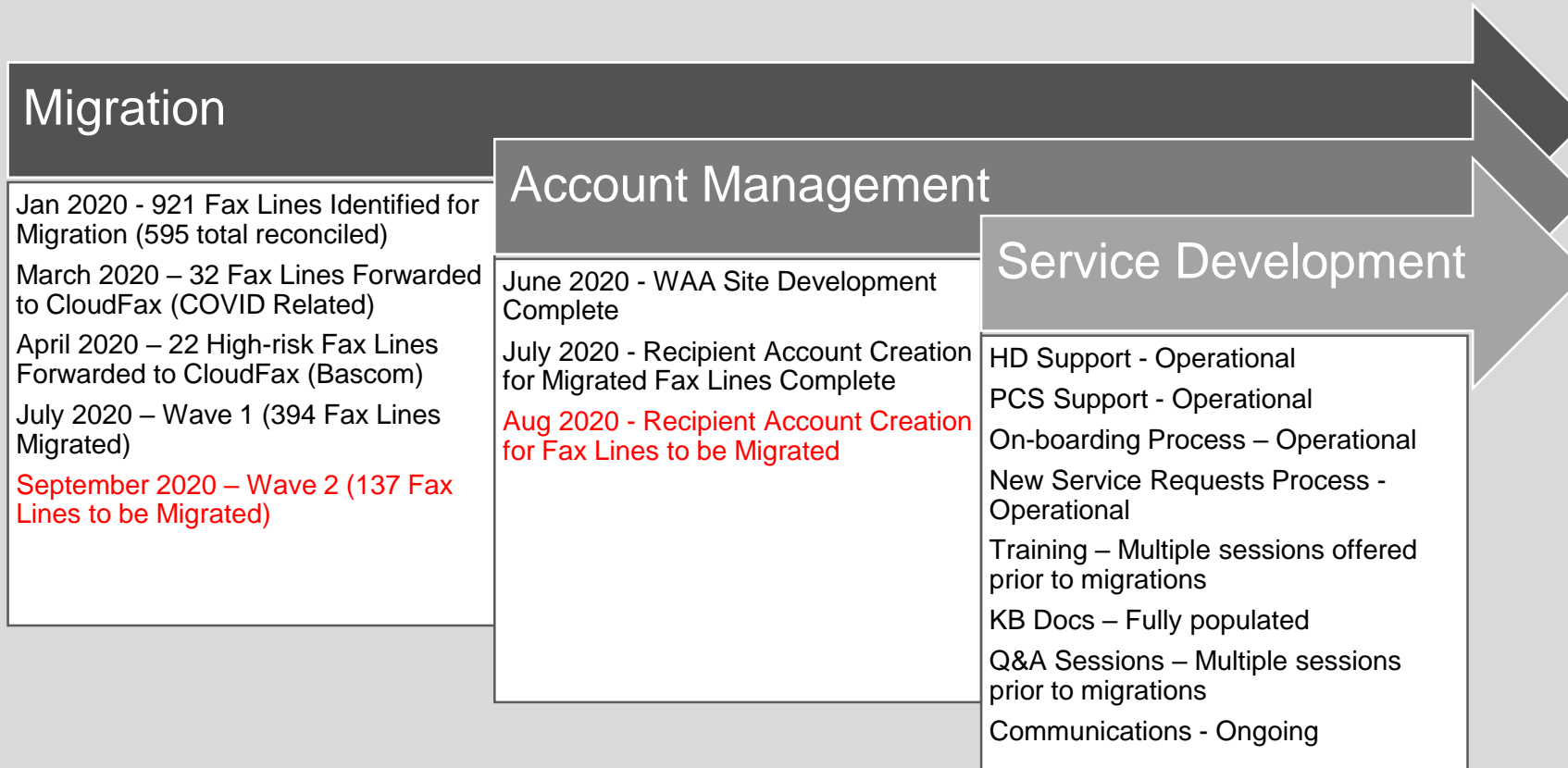
VoIP Phase 2 Scope



Types of lines designated for Phase 2

- Fax lines
- Life safety lines
 - Elevator lines
 - Blue light and emergency lines
 - Alarms
- Other lines
 - Migrating from Centrex to Cisco VoIP
 - Migrating from other legacy solutions to Cisco VoIP

CloudFax Service



Migration

Jan 2020 - 921 Fax Lines Identified for Migration (595 total reconciled)

March 2020 – 32 Fax Lines Forwarded to CloudFax (COVID Related)

April 2020 – 22 High-risk Fax Lines Forwarded to CloudFax (Bascom)

July 2020 – Wave 1 (394 Fax Lines Migrated)

September 2020 – Wave 2 (137 Fax Lines to be Migrated)

Account Management

June 2020 - WAA Site Development Complete

July 2020 - Recipient Account Creation for Migrated Fax Lines Complete

Aug 2020 - Recipient Account Creation for Fax Lines to be Migrated

Service Development

HD Support - Operational

PCS Support - Operational

On-boarding Process – Operational

New Service Requests Process - Operational

Training – Multiple sessions offered prior to migrations

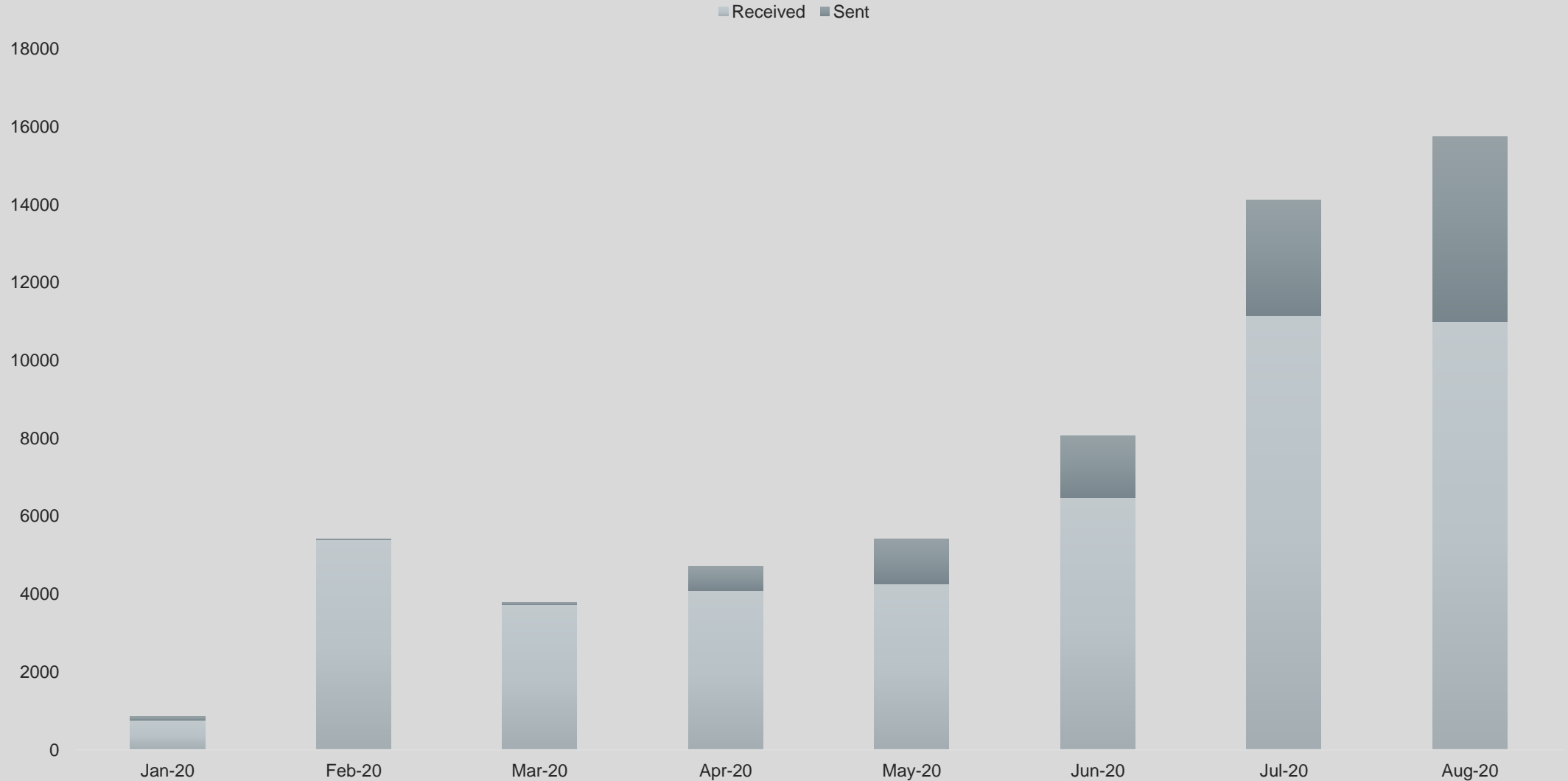
KB Docs – Fully populated

Q&A Sessions – Multiple sessions prior to migrations

Communications - Ongoing

CloudFAX Service

CloudFAX Usage Jan-Aug 2020



CloudFax Service

3435

**Total Licensed Fax Senders
(as of 8/15/2020)**

400 of 537

**Total Recipient Fax Lines
currently using the CloudFax Service
(as of 8/15/2020)**

CloudFax Service

	<u>Number</u>
Initial list of numbers. July 2019.	921
Migrated to CloudFax pre-July 27th 2020 Migration.	6
Migrated to CloudFax July 27th 2020.	394
Will be migrated to CloudFax week of September 28th 2020.	137
Future migrations to CloudFax.	43
Remaining numbers not migrating to CloudFax.	341
WSLH will migrate to their fax service.	40
UW Hospital will migrate to their fax service.	19
WFAA will migrate to their fax service.	9
USDA will migrate to their fax service.	5
Network Services will port as VoIP spare.	215
Network Services will port as active VoIP voice number.	5
Network Services ported as VoIP spare.	29
UW Health migrated to their fax service.	2
Remaining on analog line.	17
	0

VoIP Phase 2

Life Safety and Alarm Lines

- Elevators (FP&M Electric Shop)
- Blue light phones
 - Free-standing (e.g. Lakeshore Path)
 - Parking structures (UW Transportation Services)
- Alarm lines
 - Centrally monitored (UWPD)
 - Departmental (e.g. freezer alarms)



VoIP Phase 2 Remaining Work Adjustments and Timelines



- COVID-19 pandemic
 - Remote work and soft phones
- Extension restructuring
- Bascom/Lathrop Utility Project
 - Construction continued during Safer at Home Order
- Call Centers
- As many remaining lines as possible will transition during 2020-2021

VoIP Phase 2 and CloudFax Service Campus Migration Partners



- Please respond to inquires about remaining and “unknown lines”
- Please respond to CloudFax Service deadline to opt out by end-of-day Thursday (8/20)

VoIP Phase 2 and CloudFax Service



DoIT Data Center Strategy

- DoIT Data Centers are aging and significant investment is indicated for long-term viability.
- Prior to seeking further investment, DoIT contracted with Clifton, Larson, Allen LLP (CLA) from October 2019 – January 2020 to perform a data center strategy assessment.
- Partnership with State of Wisconsin Department of Administration and Oneneck, LLC has been approved by VCFA, DoIT, and FP&M, with consultation with partners.
- DoIT will be working with constituents to migrate the majority of infrastructure to one of the colocation partners over the next two years.



CliftonLarsonAllen LLP is a professional services network and the eighth largest accountancy firm in the United States. It was established in 2012 with the merger of two U.S. firms: Clifton Gunderson LLP and LarsonAllen LLP. It is a member of the Nexia International accounting network. [Wikipedia](#)

What to Expect

- Multi-year migration of DoIT Hosted Systems to State of Wisconsin and OneNeck colocation facilities
- Campus network infrastructure remains on campus
- DoIT will work with partners on timing; equipment refresh cycles are ideal
- There is no plan to increase rates for the foreseeable future
- Data is still protected whether it is at OneNeck, DOA, or CSSC
- Increased resilience, geographic diversity, physical security and virtual elimination of water-related risks

Milestones

- MOU between DoIT and DOA Division of Enterprise Technology – Fall 2020
- Network design and build-out – Fall 2020
- Rack, power distribution, and space planning is under way
- Migration plans:
 - "Fitness Test" system Fall 2020
 - Service migration planning
 - Quick wins
 - 18-24 month migration phase Fall 2020 – June 2022



Thank You

Recording/Slide Deck available at:

<https://it.wisc.edu/it-projects/projects-initiatives/>

Survey:

https://uwmadison.co1.qualtrics.com/jfe/form/SV_cJ9i9evltT5qLXf