IT Projects Update Forum

Wednesday, May 27
Agenda

1) Welcome and Structure
   1) Use Chat for questions; we will take a few questions after each update- we will post Q&A later to the website.

2) Project Briefs:
   1) Research Drive – Mike Layde
   2) Endpoint Security – Tamara Walker
   3) Endpoint Management – Tamara Walker
   4) Box Discovery – Dawn Karls
   5) WiscLists- Cathy Riley

3) Deep Dive Project Update: Interoperability Initiative – Tom Jordan
Project Briefs

ResearchDrive, Endpoint Security, Endpoint Management, Box Discovery, WiscList
### ResearchDrive Goals and timeline

- Predictable data storage resource for all research PIs
- Support for research workflows including HIPAA/CUI compliance
- Secure alternative to hard drives, lab servers, etc.
- Scalable and adaptable campus resource

<table>
<thead>
<tr>
<th>Month</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>December 2019</td>
<td>ResearchDrive launched</td>
</tr>
<tr>
<td>Spring 2020</td>
<td>Outreach, adoption planning, and on-boarding</td>
</tr>
<tr>
<td>June 2020</td>
<td>ResearchDrive support for Restricted Data</td>
</tr>
</tbody>
</table>
Progress and Outcomes

ResearchDrive
6 PB Storage Allocation

- SharedDrive
  1 PB
- Depts - 0.5 PB
- PI - Restricted Data
  1 PB
- PI - Collab
  0.5 PB
- PI - Self Service
  3 PB

Partnerships
- Research Support
- Research Cores
- Computing Centers
- DoIT
Impact and Benefits
ResearchDrive Roadmap

• **Compliance** - Continued alignment with the HIPAA program and CUI

• **Research Cyberinfrastructure** - Improved integration with Research Cores, research computing centers, and public cloud services (AWS, Azure, GCP)

• **Research Data Management Platform** - Globus will offer a secure data management platform including data transfer and sharing between research storage and computing resources including ResearchDrive, Box, AWS, as well as campus IT systems.
Endpoint Management & Security

Project Overview

Curate and deliver a set of flexible endpoint management and security tools, supported by core campus IT organizations and used by distributed IT organizations, to achieve the goals stated in the UW System Information Security Program, and to enable compliance with UW System and UW–Madison information technology policies.
Endpoint Management & Security

Goals

• Enable campus to *manage* university-owned devices
• Enable campus to *secure* university-owned devices and personally-owned devices
• Develop a consolidated campus service
  • Sustainable budget and support model
  • Serves all of campus
  • Incorporates modern endpoint management and security tools
  • Translate administrative policy/best practices into security controls and required reporting
Endpoint Management & Security

Goals

• Develop a campus governance structure that incorporates ongoing feedback and process improvement

• Do not extend the contract again for Symantec Endpoint Management.

• Meet UW-System Administration performance targets for AMP
Timeline

Q2 2018 — Discovery
Tool inventory & requirements elicitation

Q3 2018 — Tool research
Vendor research, peer benchmarking, RFI process

Q4 2018 — Budget model & purchasing
FY19 funding, FY20 budget, RFP

Q3 2019 — RFP completed
Cisco AMP purchased by UW System

March 2020 — Phase 1 completed

July 2020 — Implementation begins
Previous licenses expire
**Endpoint Management & Security**

**Phase 1 Accomplishments – Planning Campus Solution**

- Developed project team and campus stakeholders
- Developed use cases for university-owned devices requiring endpoint security and endpoint management
- Evaluated solutions for personally owned devices,
- Created a communication plan and website for information
- Assessed project risks and mitigation strategies
- Developed campus service model design proposal
- Developed roadmap for implementation
- Developed the financial model for implementation and campus service
Endpoint Management & Security

**COVID-19 Pause**

- Received one-time funding for the projects
- Split Endpoint Management and Endpoint Security projects due to difference in monetary scale
- Reduced scope and scale of deployment for both projects to reduce costs
- Reworked implementation strategy
Endpoint Security

Where are we now?

- Cisco AMP selected to replace Symantec Antivirus on university-owned endpoints.
- Cisco AMP is actively being deployed for compatible devices.
- Other solutions TBD for use cases not covered by AMP
Endpoint Security

Where are we now?

- Faculty & Staff personally-owned devices
  - Symantec license ends July 31, 2020
  - Trend Micro selected as security solution for MacOS, iOS, Android
  - Windows Defender recommended for Windows OS

- Student personally-owned devices
  - Symantec license expires June 24, 2020
  - Gatekeeper built-in protection recommended for MacOS.
  - Sophos and Avast recommended as possible additional protections for MacOS
  - Windows Defender recommended for Windows OS
Endpoint Security

*Impacts*

- Symantec Antivirus being replaced with AMP on university-owned endpoints

- Faculty, staff, and students will be required to remove Symantec Antivirus from personally-owned machines and replace it with the recommended security tools.

- Communications to faculty, staff, and students regarding personal security software to begin soon
Endpoint Management

Where are we now?

• Refining implementation strategy based on one-time budget (FY21)
  • Eliminated consulting
  • Significantly reduced training
  • Reduced/shifted licenses being purchased to maximize investment

• Confirming commitment to service funding (FY22-23)

• Contract negotiations pending

Project website:  https://it.wisc.edu/it-projects/endpoint-management-security-project/
Box

Project Overview

Dec 2019

- Box announced changes to pricing model for Hi-Ed, eliminates unlimited storage
- Contract is renewed 1 year at current cost $240,000
  - Must reduce storage footprint from 960TB to 285TB to keep spend flat beyond 2020
  - Projected 2021 cost at current storage: $750,000 (not including 1TB growth per day)

Feb 2020

- Box Task Force assembled to develop strategies to reduce footprint in Box and contain costs.
- Box Evaluation Project kicks off: https://it.wisc.edu/it-projects/box-evaluation-project/
Box

Project Overview

Mar 2020

• Task Force Outreach – develop a better understanding of use cases and impact
  • Campus listening sessions
  • Survey (2,900+ responses)
  • Interviews

• COVID-19 response efforts shift task force approach
  • Mindful of pressures IT was under during emergency response
  • Focused on delivering short-term recommendations to provide the university additional time to reduce footprint without incurring extreme additional cost.
Box

Project Deliverables

Apr 2020

Approved Task Force Recommendations

• Renegotiate 3 yr. contract with Box
  • Required to reduce storage to meet annual contract quotas

• Implement storage quotas
  • New accounts provisioned with 50GB quota
  • Existing accounts capped at current storage + buffer

• Engage top Box accounts in use case consultations

• Partner with Research Drive team to evaluate alternate storage options
Box

Next Steps

• Broad campus communications – watch for emails, TechNews, website updates
• Storage quotas effective June 15, 2020
• **Phase 2:** Box Evaluation Project ➔ Box Storage Reduction Project

Thank you to the Box Task Force members for serving on this project and to all university stakeholders that shared their use cases to help inform our recommendations.
WiscList

Project Overview

• Current service on aging software with reliability and user interface issues

• Strategy - Use existing campus services to provide enhanced functionality, minimize cost, and reduce service redundancy

Project Goals

• Provide a more robust, reliable, and modern service

• Enable email list users to continue to realize the benefits of using email lists

• Provide migration processes that are not disruptive to WiscList users across campus
# WiscList

<table>
<thead>
<tr>
<th>Migration Milestones</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>WiscList Main - Manual migration <em>available</em> for list owners</td>
<td>June 1 – December 21, 2020</td>
</tr>
<tr>
<td>ClassLists - List creation in Google Groups (similar to current process)</td>
<td>June 2020</td>
</tr>
<tr>
<td>WiscList Custom - Automatic migration of lists</td>
<td>July - August 2020</td>
</tr>
<tr>
<td>AdvisorLists - List creation in Google Groups (similar to current process)</td>
<td>July - August 2020</td>
</tr>
<tr>
<td>List Library – Automatic migration of lists. No process change for most users</td>
<td>July - August 2020</td>
</tr>
<tr>
<td>Marketing lists - Engagement with list owners for Eloqua transition</td>
<td>Current – December 21, 2020</td>
</tr>
</tbody>
</table>
WiscList

Progress/Accomplishments

• Migration button for migrations from WiscList Main into Google Groups available June 1, 2020
• Wisc Account Administrator Interface updated for Google Groups creation
• Google API integration for uploading large lists into Google Groups
• ClassLists creation ready for June
• MyUW eMail lists widget ready for release on June 2, 2020

Up next

• Data-driven lists implementation
• Manifest integration
WiscList

Benefits we have already experienced
  • Early migration of select lists enabled faster campus communication pathways during COVID-19 response
  • The Google API is available to campus IT staff

Benefits with the full transition
  • Reduction in delays in email delivery
  • Ease of use in a modern administrator interface
  • Robust and reliable service
WiscList

Campus Impact

- More robust, reliable, and modern service
- Small impact to university stakeholders as most individuals receive email via these lists and do not administer them
- Straight-forward migration process for list administrators
- Targeted training, lunch & learns, and documentation will be provided to list administrators

WiscList Migration Project Website https://it.wisc.edu/it-projects/wisclist-migration-project/
Deep Dive Project Update

Interoperability Initiative
What is Interop?

• A more thoughtful approach to how we “plug things in” to the UW ecosystem

• A focus on looking across system silos to understand and improve customer experiences and outcomes

• A vision for enabling access to the right services at the right times, and for the right reasons.
Current Integration Landscape

- System-Centric
  - Each system an island
  - No structure between systems

- Tactical
  - Many point solutions that do not fit well together

- Inflexible
  - Change is difficult and slow
  - Many missed opportunities

- Fragile
  - A change to one is a change to many
  - Every change has a ‘blast radius’

- Incoherent
  - Very difficult for users to navigate
  - Impossible to effectively manage and report on access
Interop Areas of Focus

Data Interoperability
- Aligning data with business language
- Consistent presentation of data
- Alignment with campus data governance processes

Integration Platform
- Platform for data ETL between systems
- Connectors available for many commercial systems

Identity Governance and Administration (IGA)
- Role-based access control
- Rule-based / request-based provisioning and deprovisioning
- Automated grant and removal of access on lifecycle changes

Integration Best Practices
- Guidance to integrators and developers
- Standards for procurement and implementation of new services

Onboarding and Registration
- Consumer Identity and Access Management (CIAM)
- Lightweight registration
- Social Login Integration
- Alignment with CRM functions
- Expanded populations

API Infrastructure
- Platform for real-time, API-based integrations
- Infrastructure to manage API security and access control
Sustainable “Plumbing” for Apps

- Exchanging meaningful business data between applications
- Enabling and managing user access
- Creating a sustainable integration practice
- Security by design
- Reusable patterns
- Tools and Infrastructure
# Profile (Wireframe)

## Personal Info

**Basic info, such as your name and photo, that is used at UW Madison**

### Profile

| Photo | Meagan Holman
|-------|-----------------
| Legal name | Megan Holman
| Preferred name | Megan Holman
| Birthday | April 15, 1990
| Pronoun | She, Her, Hers
| Gender | Female
| Campus ID | 9011549567
| Personal Interests | Psychology, Hiking, Camping

### Contact info

| Email | meagan.holman@wisc.edu (primary)
|-------|-------------------
| Campus phone | 608-642-4818
| Home phone | 608-834-2238
| Campus address | 1234 EE Baylon St, #1234, Madison, WI 53706
| Home address | 1234 Elm St., Madison, WI 53704

## Data & personalization

**Your data, activity, and preferences that help make campus services more useful to you.**

### Campus roles

- **Faculty/Staff**: Active
- **Student**: Inactive
- **Campus Sustainability Committee Chair**: Active

### Applications with access to your information

- Microsoft Office 365
- JIRA
- Student Information System
- TextMe

### General preferences

- **Language**: English
- **Accessibility**: Screen reader: OFF, High-contrast off: OFF
Progress and Achievements to Date

- **Discovery**
  - Discovery Sprint
  - Campus engagements
  - Peer research

- **Initiative Kickoff**
  - Campus kickoff
  - Staff engagement
  - Team / process organization

- **Market Analysis**
  - RFI for infrastructure components
  - Gartner / Unicon engagements

- **Begin Implementation**
  - License procurement
  - Partner selection
  - Infrastructure build-out

- **Initiative Planning**
  - Budget estimation
  - Staffing estimation
  - Executive approval

- **Solution Design**
  - Architecture / design
  - Requirements analysis
  - Technical strategy

- **Product Selection**
  - Identity – Salesforce, midPoint
  - Integration – Informatica Cloud
  - API – RFP required
Interop Architecture

Salesforce Community Cloud as CIAM Platform
• Self-registration, social login, lightweight onboarding
• Tailored community experiences
• Common repository of person and account information

Enterprise grouping
• Role-based access control
• Delegated administration

Enterprise provisioning
• Access control across multiple infrastructures
• Improved deprovision and audit capability

Integration Platform
• Common tools and methods for integrating applications
• Support for contemporary integration patterns (API, event)

Domain-based Design / Integration
• Alignment with campus data strategy
• Isolation from technical change
### 2020 Interop Timeline

#### Key Activities – June / July

- Salesforce Community Cloud Implementation Vendor Selection
- API Manager RFP completion
- Unicon (midPoint implementation partner) SOW and kickoff
- MVP for Informatica Cloud
- ERP/Interop Task Force
Challenges and Risks

- Scope / Scale
- Staying ahead of ERP initiatives
- Balancing UW-Madison and UW System
- Aligning with related efforts
- Campus data governance efforts
- CRM / OneBadger
- Organizational change management
- Continuing operational demands
- Legacy systems complexity
Thank You

Feedback Survey -
https://uwmadison.co1.qualtrics.com/jfe/form/SV_50VZBOgj3SbS6u9

Forum recording and Q&A will be posted to -
https://it.wisc.edu/news/spring-it-projects-update-forum-coming-may-27/

For more information about IT Project and Initiatives, visit -
https://it.wisc.edu/it-projects/it-initiatives-major-upgrades/