Brown Bag Presentation
Centralization - November Update

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Thursday, November 17, 2016
Introduction

- To date, 50 IT professionals representing 4 UGEN units, 4 schools and the College of Arts and Sciences have become part of [U]Tech.
- An additional 23 IT professionals representing 3 UGEN units and 3 schools will transition by the end of the calendar year.
- Cross-institutional team identified 760 servers for relocation, virtualization or decommissioning; moved 41 to date.
- Efforts underway to document services and complete a university-wide skills inventory of IT professionals.
Goals

- Critical improvements to the university’s information security and business continuity efforts
- Remove barriers to the delivery of a consistent IT experience across the university
- Optimize the university’s IT investments by reducing redundancies and enhancing economies of scale in services and purchases
- Provide additional professional development opportunities for the CWRU IT professionals
Mission, Vision + Core Values
Mission

We support and enhance the academic and research mission of Case Western Reserve University through responsive service, enabling infrastructure, effective administrative systems and innovative solutions.
Vision

To be a preeminent organization that empowers CWRU's transformational teaching, learning and research.
Core Values - ASCII

Adaptability
Service Excellence
Collaboration
Innovation
Integrity
Guiding Principles

1 - Moving to a Culture of “We”
2 - Honoring What Is and Has Been.
3 - A New Destination
Strategy

- Learning the Landscape
- Building Awareness and Support
- Engaging People in the Change Process
- Using Power and Influence to Further Build Support
- Incorporation of Changes
- Demonstrating and Documenting Results
Campus Engagement

- Administrative Professionals Information Sessions; 4/21, 4/28
- Dedicated Website; Highlights/Archives Centralization Activities; case.edu/utech/centralize
- Projects LIVE - Monthly Broadcasts
- [U]Tech Orientation - UGEN, Law, Nursing, WSOM, SOM; August
- Law School Faculty/Staff Meeting; August
- Ongoing Updates to President’s Cabinet and Board of Trustees
Professional Development

- Greater opportunity for the growth and development for IT professionals
- Accomplishments/opportunities
  - Meetings between [U]Tech staff and the Deputy CIO
  - Goal-Focused Development Plan
  - Compiling Skills Database
  - MOR Advanced Leaders Program
Personnel Updates

2016 Personnel Transitions

<table>
<thead>
<tr>
<th>JAN 5</th>
<th>JULY 1</th>
<th>AUG 1</th>
<th>AUG 15</th>
<th>OCT 1</th>
<th>NOV 1</th>
<th>NOV 30</th>
<th>DEC 30</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial IT Work Guidelines</td>
<td>JAN 5 - MAR 23</td>
<td>Creating Unified IT Culture Guidelines</td>
<td>MAR 1 - JUN 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated IT Work Guidelines</td>
<td>MAR 12 - JUN 14</td>
<td>Professional Development Guidelines</td>
<td>MAR 1 - JUN 14</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Staff from Decentralized IT Transitioned into Utech by Month and Management Center

<table>
<thead>
<tr>
<th>Management Center</th>
<th>Research Admin</th>
<th>Student Affairs/ Campus Svs</th>
<th>Facilities</th>
<th>Library</th>
<th>Law</th>
<th>SOM - Academic and Administrative Computing</th>
<th>WSOM - ITG</th>
<th>Nursing</th>
<th>WSOM Classroom Tech</th>
<th>University Relations and Development</th>
<th>MSASS</th>
<th>Dental</th>
<th>CAS</th>
<th>CSE</th>
<th>Security Systems</th>
</tr>
</thead>
<tbody>
<tr>
<td># of Filled Positions</td>
<td>4</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>6</td>
<td>13</td>
<td>8</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td># of Open Positions</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Total # per Month</td>
<td>4</td>
<td>6</td>
<td>1</td>
<td>1</td>
<td>6</td>
<td>13</td>
<td>8</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Cumulative at Month End</td>
<td>19</td>
<td>46</td>
<td>50</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td></td>
</tr>
</tbody>
</table>

Does not include IT staff reporting to researchers nor two individuals in Public Safety
Service Management Updates

- Assessed and evaluated the current model to determine the best way to deliver services in a new, centralized environment
- Utilized information in developing the larger UTech organizational model
- Continuing to gather requirements while reviewing initial draft for evaluating a new service management platform
- Evaluating the initial draft of business case to decide best option for moving forward
Hardware + Infrastructure Update

Initiative: Centralization Server Moves
Executive Sponsor: Sue Workman

- **LAW Phase 2**: Jul 1 - Jul 31
- **MSASS**: Jul 1 - Sep 30
- **Nursing**: Aug 1 - Sep 30
- **WSOM**: Aug 15 - Nov 30
- **CAS - Admin**: Aug 24 - Dec 31
- **CAS - Research**: Sep 1 - Nov 30
- **UGEN**: Nov 1 - Jan 31
- **SOM - Admin**: Nov 1 - Jan 31
- **SOM - Research**: Nov 1 - Mar 31
- **Dental**: Sep 15 - Dec 31
- **CSE**: Jan 1 - Jun 30

2016
- July
- Aug
- Sep
- Oct
- Nov
- Dec
- 2017
- Jan
- Feb
- Mar
- Apr
- May
- Jun

Today
## Hardware + Infrastructure Update

### Servers Identified Outside Data Center*

<table>
<thead>
<tr>
<th>Management Center</th>
<th># of physical servers</th>
<th># of virtual servers</th>
<th># of physical/virtual servers moved</th>
<th># of physical servers identified to be shut down</th>
<th>Servers not under warranty</th>
<th>Operating System not supported</th>
<th>Square Footage Gained</th>
<th>Daily Estimate Wattage Identified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Science</td>
<td>15</td>
<td>11</td>
<td>10</td>
<td>2</td>
<td>3</td>
<td></td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>University General</td>
<td>35</td>
<td>0</td>
<td>3</td>
<td>2</td>
<td>7</td>
<td>2</td>
<td>16</td>
<td>750</td>
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<tr>
<td>Engineering</td>
<td>75</td>
<td>318</td>
<td>0</td>
<td>53</td>
<td></td>
<td></td>
<td></td>
<td>572</td>
</tr>
<tr>
<td>MSASS</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td>100</td>
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<tr>
<td>Law - Phase 2</td>
<td>0</td>
<td>17</td>
<td>17</td>
<td>7</td>
<td></td>
<td></td>
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<td>168</td>
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<tr>
<td>Medicine</td>
<td>85</td>
<td>54</td>
<td>2</td>
<td>59</td>
<td>7</td>
<td></td>
<td></td>
<td>225</td>
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<tr>
<td>Weatherhead SOM</td>
<td>5</td>
<td>21</td>
<td>0</td>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td>150</td>
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<tr>
<td>Dental Medicine</td>
<td>7</td>
<td>12</td>
<td>0</td>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td>TBD</td>
</tr>
<tr>
<td>Nursing</td>
<td>2</td>
<td>5</td>
<td>7</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td>TBD</td>
</tr>
<tr>
<td>Total</td>
<td>227</td>
<td>439</td>
<td>41</td>
<td>21</td>
<td>126</td>
<td>9</td>
<td>1,231</td>
<td>25,544</td>
</tr>
</tbody>
</table>

*The table above details the servers identified outside the Data Center, including the number of physical and virtual servers, the number of physical/virtual servers moved, the number of physical servers identified to be shut down, servers not under warranty, operating system not supported, square footage gained, and daily estimate wattage identified for each category.*
## Hardware + Infrastructure Update

### Project Status + Achievements

1. Nursing Completed, Sep 17  
2. MSASS Completed, Sep 22  
3. CAS-Admin Move, Oct 24  
4. Ongoing ORA Server Move to Data Center  
5. Received Server Census Data for CAS-Research/UGEN Departments  
6. Continued Migration of SOM Server Data to Data Center  
7. Completed Review Meeting with Dental School to Discuss Virtual Server Move  

### Near-Term Planned Activity (2 Weeks)

- Continue Census of the Remaining UGEN Departments  
- Test the VM to VM Migration Process for the Dental School PACS Server  
- Complete Server Move for Office of Research Administration  
- Continue Migration of SOM Server Data to KSL
Shifting Focus

- Shifting focus from “enterprise” to “distributed”
- Next steps
  - Examining service catalogs
  - Skills inventory
  - Social/Technical culture (i.e. requirements)
  - Project review
  - Financial review
Creating Capacity to Fuel Innovation
Discussion

What are the next set of conversations?
Questions + Answers