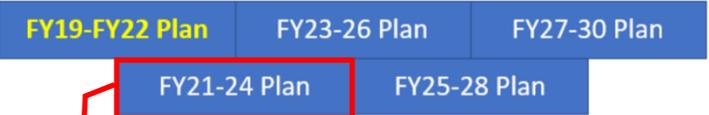


The Division of Finance IT Services (ITS) team is pleased to provide a summary of major accomplishments as we embark on year two of our four-year strategic plan. Our current plan, issued in early 2018, is undergoing a recalibration for reissuance during the FY21-24 period.

As our team completes our primary technical objective of migrating the legacy SFS computing network into the prevailing Finance network, resources will be shifted to focus more on (i) information security infrastructure and training, (ii) our new IT Orientation and customer tech education sessions, and, (iii) continued modernization of existing technologies like remote access, file storage, and collaboration tools.

Each four-year strategic plan captures two years of planned work, followed by two years of forecasted work that is pending finalization and funding. The strategic plan is reviewed, revised, and reissued every two years with an updated four-year plan.



FY21-24 Strategic Plan under development now for publication in 4Q20

DoF IT Orientation Topics

- Overview of how IT is organized
- Getting help & tech support
- IT policies and procedures
- Information security, privacy, FERPA compliance
- User accounts and logging in
- Your PC & printing infrastructure
- Office 365, Outlook email, Listserv distributions
- File storage and collaboration options
- PennNet network overview, remote access
- Traveling tips
- Personal computing devices
- PennNet phone system
- Teleconferencing options
- Conference rooms
- KnowledgeLink, LinkedIn Learning
- Required training
- IT perks at Penn
- Tech Ed sessions
- Helpful references

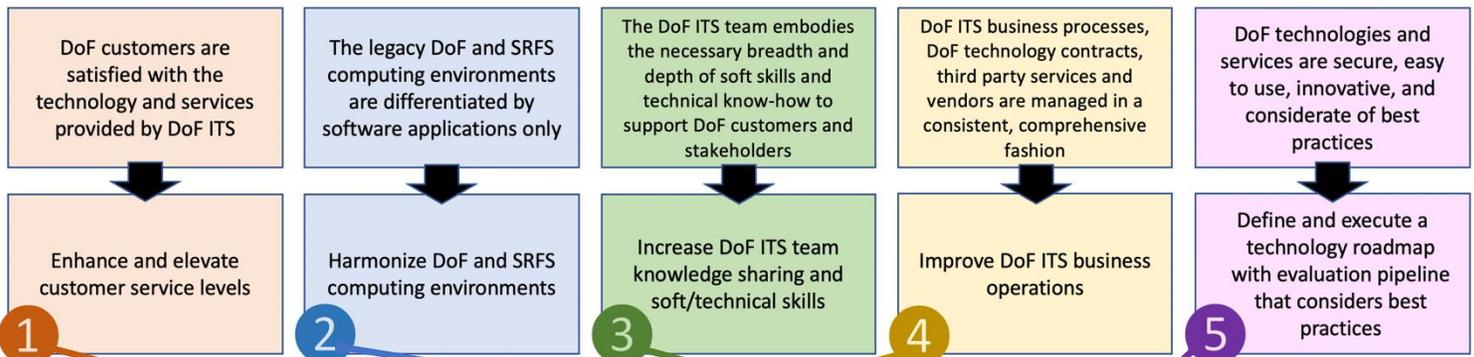
Customer “Tech Ed” Sessions

- Outlook / Office 365 Tips and Tricks
- File Storage and Collaboration Options
 - Network Drives, Box, OneDrive, MS Teams, Secure Share
- Box and Box Drive Detailed Overview
- Remote Access Options, Do’s and Don’ts
- BlueJeans Teleconferencing Overview
- Microsoft Teams for Collaboration and Instant Messaging
- PennKey and Password Management Best Practices

Interested in these topics?
Ask to sign up for the next available training session

Strategic Plan Reissue

As ITS closes out major strategic objectives and actions, like harmonizing the legacy DoF and SRFS computing environment, replacement objectives will be defined to address the evolving technology needs of our customers. **Our revised four-year strategic plan will be issued in 4Q20.**



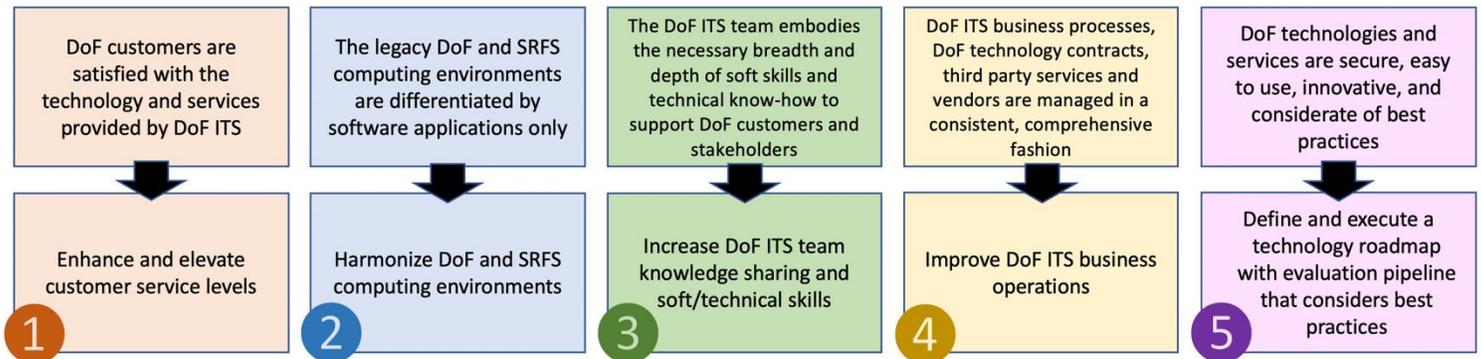
**Work Continues in Updated
FY21-24 Strategic Plan**

Nearing Completion

Over

FY19-20: Major Accomplishments

Five Strategic Objectives ⇨ Five Strategic Actions



1. Enhance and elevate customer service levels.

- Completed team **customer service training**
- Currently configuring a **new helpdesk ticketing system** to replace the FootPrints system in early calendar 2020
- Enabling an email support option: **Email your support requests** instead of completing online web forms for tickets
- Implemented customer service and infrastructure **performance metrics with key performance indicators**
- Defined **new IT Orientation session** to be held monthly, beginning in October, 2019 – open to all staff
- Defined **customer Tech Education sessions** to be held starting in 3Q20

2. Harmonize DoF and SRFS computing environments.

- Shutdown and **migration of the SFS network to the Finance network**; slated for completed by January, 2020
- **Rebuilding network and data storage infrastructure** hosted at the Pennovation Data Center by January, 2020
- Modernized and **upgraded all legacy SRFS computers** and user network accounts
- **Increased reliability of remote access** (VPN and VDI) for all users

3. Increase DoF ITS team knowledge sharing and soft/technical skills.

- Deployed a process to assign **primary and backup support staff** for the majority of ITS-supported technologies
- Partnered each staff member to work on a **year-long joint accountability and solution development** strategy
- Rolled out campus **IT Academy online training curriculum** for all ITS staff members

4. Improve DoF ITS business operations.

- All **IT contracts shifted into a central repository** for ongoing management
- **Implemented project planning tool** (SmartSheet®) and methods for all ITS-managed projects
- Incorporated **all critical systems into the campus Security, Privacy and Impact Assessment (SPIA)** tool
- Completed a **comprehensive Business Impact Analysis (BIA)** in support of Penn's Mission Continuity planning

5. Define and execute a technology roadmap with evaluation pipeline that considers best practices.

- Drafted a **5-year infrastructure roadmap** to better plan technology replacements, upgrades, and staffing needs
- **Evaluating prevailing campus best practices** before defining and executing new DoF technology strategies
- Now planning staff resources for a continuous **rolling two year pipeline of identified project work**

For a comprehensive list of projects completed by our team, visit:

www.finance.upenn.edu/ITS/CompletedWork