

## UW FT Combined Program

### Executive Summary - 3/31/2022

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
<b>Finance Transformation Combined Program</b>	Mark Richards Chris Mercer	UW	↓ <sup>(A)</sup>	●	●	●	↓	●	\$171,977,000	\$339,906,000
<b>Functional</b>	Paula Ross	Program	↓	●	●	↓	●	●	\$17,493,924	--
<b>Technical</b>	Gail Rogers	Program	↓	●	↓	●	●	●	\$26,040,587	--
<b>Change Management</b>	Jeff Bishop	Program	↓	↑	●	●	↓	↑	\$4,844,015	--
<b>Project Management</b>	Elise Barho	Program	↓ <sup>(B)</sup>	●	↓	●	●	↓	\$4,255,819	--

#### Enterprise Systems Remediation

<b>UW Medicine</b>	Sarah Cantwell	●	●	↓	↑	●	●	\$10,089,623	--
<b>Research Administration</b>	Ryan Green	↓	↓	●	●	↓	●	\$6,592,004	--
<b>Finance Readiness Program</b>	Jeanne Marie Isola	↓	↑	↓	●	↓	●	\$5,866,683	--
<b>Integrated Service Center</b>	Greg Koester	●	●	●	●	●	●	\$1,337,102	--
<b>UW-IT</b>	Rob McDade	↓	↓	●	●	●	↓	\$4,665,388	--

#### Departmental Systems Remediation (Campuses, Schools, Colleges, Departments, Auxiliaries)

<b>Unit Readiness</b>	<i>Overall readiness of academic, medicine and administrative units</i>	●	The Systems Design Support (SDS) retirement sessions have begun. Outside of the SDS sessions, the program has not fully defined responsibilities and processes for engaging with campus on topics such as testing and cutover.
<b>Side System Remediation</b>	<i>Overall status outside the Core Program and Enterprise Systems</i>	●	Some campus units are behind in their deliverables and escalations are proceeding to assist them. Also working with Units to help determine best E2E cycle. Only one of 30-40 systems that need to integrate with Workday has engaged with the Program.

**9 separate projects under one Combined Program,  
plus 2 areas of work across the campus**

Notes:
<p>(A) The total cost and budget for the project include the initial Readiness project (\$23M). Also included in the central budget are Contingency, Reserves and Executive Director funds; and underspending within sub-projects will be moved to Reserves in the central budget on a monthly basis.</p> <p>Overall Program health changed by one point.</p> <p>(B) Four FTE were transferred from EPMO to the Functional Pillar. The budget and actuals – including history – for those staff were transferred as well.</p>

UWFT Combined Program Executive Summary - 3/31/2022

**Finance Transformation Combined Program**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Finance Transformation Combined Program	Mark Richards Chris Mercer	UW	15	2	3	3	4	3	\$171,977,000	\$339,906,000

Functional	Paula Ross	Program	15	2	3	3	4	3	\$17,493,924	--
Technical	Gail Rogers	Program	16	2	4	3	3	4	\$26,040,587	--
Change Management	Jeff Bishop	Program	13	1	3	2	4	3	\$4,844,015	--
Project Management	Elise Barho	Program	13	2	3	2	3	3	\$4,255,819	--

*Enterprise Systems Remediation*

UW Medicine	Sarah Cantwell		17	4	4	2	4	3	\$10,089,623	--
Research Administration	Ryan Green		16	3	3	3	4	3	\$6,592,004	--
Finance Readiness Program	Jeanne Marie Isola		16	2	4	3	4	3	\$5,866,683	--
Integrated Service Center	Greg Koester		12	2	2	2	3	3	\$1,337,102	--
UW-IT	Rob McDade		15	3	3	3	3	3	\$4,665,388	--

*Departmental Systems Remediation (Campuses, Schools, Colleges, Departments, Auxiliaries)*

Unit Readiness	<i>Overall readiness of academic, medicine and administrative units</i>	Y	The Systems Design Support (SDS) retirement sessions have begun. Outside of the SDS sessions, the program has not fully defined responsibilities and processes for engaging with campus on topics such as testing and cutover.
Side System Remediation	<i>Overall status outside the Core Program and Enterprise Systems</i>	Y	Some campus units are behind in their deliverables and escalations are proceeding to assist them. Also working with Units to help determine best E2E cycle. Only one of 30-40 systems that need to integrate with Workday has engaged with the Program.

The program remains in YELLOW status. The program is ready to transition from Configuration and Prototype to the Test Stage. We expect the focus of the first end-to-end cycle to be on the Workday Financials application. Integrations and reports will be rolled into testing when ready with the majority currently scheduled to occur in cycles two and three. We will continue to monitor and adjust the cycle schedule if necessary to ensure that adequate testing occurs. We are estimated to exceed our budget planned for this fiscal year as a result of our increased usage of contractors to staff critical vacancies. We expect the budget pressure around staffing to continue for the next several months. Schedule pressure is increasing as we prepare to enter the Test Stage. The teams are beginning to see delays directly related to open positions. We continue to mitigate with contractors and will continue to monitor.

Updated 04/11/22, by Christopher Mercer

**Notes:**

(A) The total cost and budget for the project include the initial Readiness project (\$23M). Also included in the central budget are Contingency, Reserves and Executive Director funds; and underspending within sub-projects will be moved to Reserves in the central budget on a monthly basis.

Overall Program health changed by one point.

UWFT Combined Program Executive Summary - 3/31/2022

**Functional**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Functional	Paula Ross	Program	15	2	3	3	4	3	\$17,493,924

**OVERALL STATUS:** The UWFT Functional pillar continues to be in yellow status due mainly to resource constraints. While the team is understaffed, they made significant progress in closing design decisions that impact configuration as well as completing unit testing. The team's focus will now shift to end to end testing, end to end process documentation and functional support for our partners across the program.

**Major Accomplishments:**

- Completed the Tenant 3.0 build and data validation
- Realigned the operating model team and associated process transformation team to ensure work is happening in support of all levels of shared support and the customer support model.
- Closed out 98% of our open design decisions that impact configuration
- Completed unit testing
- Reviewed over 200 new requirements
- Completed workshops related to account posting rules and claim on cash
- Developed end to end test scenarios

**Key Upcoming Milestones:**

- Complete cycle 1 of end to end testing
- Develop end to end process documentation
- Close out remaining open design decisions
- Complete configuration and all testing related to Release 1 of Adaptive
- Work with UW Medicine to understand needs related to Operating model

**Staffing Resources:**

- Continue to recruit for functional team vacancies

**Issues and Risks:**

- Recruitment of qualified candidates is an exceptional challenge at this time. Contract resources are being used as a stop gap continue the momentum of work (at increased cost)

*Completed by Paula Ross 4/18/2022*

UWFT Combined Program Executive Summary - 3/31/2022

**Technical**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
<b>Technical</b>	Gail Rogers	Program	16	2	4	3	3	4	\$26,040,587

**OVERALL STATUS:** The technical team has 13 workstreams including: Data Platform (2), Reporting, Gap Applications, Remediating HR/P Workday, Finance Data Repository (FDR), Remediations of UW-IT systems, Retirement of systems, Student Database (SDB), Identity and Access Management, Service Management, Data Conversions, and Campus Outreach. The teams are making great progress in getting data from Workday out to other systems through the Enterprise Data Platform (EDP) - many areas are working on the 7th release of Financial Web Services (FWS). We continue to complete 16 gap applications, modify ServiceNow (UW Connect) to support the operating model and Workday processes, remediation of SDB, planning for the 4.0 tenant, and developing a joint data repository for Academy and UWM customers. We have begun the Systems Design Support (SDS) program for assisting systems retirements. Huron's Employee Compensation Compliance (ECC) contract was signed and the team is now moving forward with the work to get it ready for E2E Test cycle 3. With the change of deployment dates for One WA, the team needs to replan the AFRS solution (State financial system used for tracking finances for all State agencies).

**Major Accomplishments:**

- Config tenant 3.0 completed
- EDP Finance Web Service release 7 completed
- EDP Operational Data Store (ODS) release 5 completed
- FTT scope for E2E test cycle 1 completed, test scenarios completed
- Huron ECC contract signed
- Successful completion of the second technical conference with 250 participants, 13 sessions and 35 speakers

**Key Upcoming Milestones:**

- Planning for tenant 4.0
- Integration designs for ECC effort reporting tool
- Execution of SDB E2E cycle 1 test cases
- Hire critical resources for development, quality assurance and business analysts
- Replan AFRS integrations with the state

**Issues and Risks:**

- Some campus units do not have the resources or design information necessary to complete remediations. We are working with the units to understand their delivery dates and escalate where assistance is needed (**significant risk**)
- eFECS replacement (ECC) is starting very late and has risks around integration, cross-era reporting, and timeline
- Solution for cross-era reporting has not been completed which impacts the conversion, reporting, and remediation teams across enterprise systems teams
- Requirements for UW Connect workflows to support Workday E2E processes are not complete and the team cannot design or develop. Additionally, the E2E test scenarios currently do not include UW Connect
- It is unknown what technical scope impacts there will be for the Sup Org replacement
- End to End testing scope and technical support needs are unknown for the next 2 cycles
- A cutover lead for each pillar has recently been requested and hiring will need to begin for that resource
- FTT has 41 dependencies on design decisions that are not made and some are not scheduled to be completed until May
- Currently only 1 customer system has connected to the EDP for inbound Workday transactions (30-40 are expected)

## Change Management

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Change Management	Jeff Bishop	Program	13	1	3	2	4	3	\$4,844,015

**OVERALL STATUS:** We are on track with all OCM work except finalizing Change Impacts which is due to Design work being behind. We plan to finalize Change Impacts in April/May. We have not been able to fill the four training developer roles and will now use that budget to add additional Deloitte offshore developers. We have launched the go-live readiness checklist approach and tools for each unit, called "Unit Readiness Tracking".

**Major Accomplishments:**

- Finalized **Change Readiness Assessment** Survey analysis, findings and unit action plans
- Conducted the third **Workday Core Concepts Session**, focused on Security
- Conducted second **UWFT Roadshow** session
- Launched **Unit Readiness Tracking**, which units use to manage and track the tasks they need to do to be ready for go-live
- Finalized the **Workday Curriculum**
- Started **Workday and Adaptive R1 course designs**
- Identified and launched the **UW Medicine Change Agent Network**

**Key Upcoming Milestones:**

- **Begin Shared Environment course designs**
- Finalize **Change Impacts** and Summary documentation
- Identify Academy and UWM **Power Users**
- Conduct first **Finance Literacy** session
- Conduct first **What's Changing** Session

**Issues and Risks:**

- **RISK:** Process & System Design is still not 100% complete and has impacted our ability to finalize change impacts. We will now conduct impact "sprint" sessions in Apr/May after design decisions have been closed.

Jeff Bishop, April 7, 2022

UWFT Combined Program Executive Summary - 3/31/2022

**Project Management**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Project Management	Elise Barho	Program	13	2	3	2	3	3	\$4,255,819

**Overall Status:** The EPMO has developed a standard set of dashboards and tools for the UWFT Program. As we progress through Configuration and Prototype (C&P) the PMO will develop and monitor the exit criteria and sufficiency for this C&P stage. New metrics and dashboards will be added to provide visibility into status of the next stage of work, which is Test. A Test Lead has been onboarded and will bring together testing from all pillars and for all test phases e.g. End-to-End, Performance, Payroll, Regression, UAT and Operational Readiness.

**Major Accomplishments:**

- Presented the Configuration and Prototype Closure report to the UWFT Sponsors and got approval to proceed into the Test Stage.
- End-to-End (E2E) Cycle 1 Testing started, as planned, on April 3, 2022. Logistics established across the program.
- Developed a comprehensive Test dashboard used across the UWFT Program to track status, issues, and plans
- Tennant 3.0 build complete

**Key Upcoming Milestones:**

- Complete E2E Cycle 1 testing.
- Detailed test schedule developed for Cycles 2 and 3
- Sign-off on Payroll Test plan
- Tenant 4.0 build

**Staffing Resources:**

- EPMO is on plan for resources. Adjustment to staffing in process to fill gap in test team due to attrition.

**Issues and Risks:**

- Risks and Issues for EPMO are rising as we exit C&P and start Test. Test is dependent on the completion of development work across all pillars.

*Elise Barho, April 11, 2022*

**Notes:**

(B) Four FTE were transferred from EPMO to the Functional Pillar. The budget and actuals – including history – for those staff were transferred as well.

UWFT Combined Program Executive Summary - 3/31/2022

**UW Medicine**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
UW Medicine	Sarah Cantwell	Enterprise Systems	17	4	4	2	4	3	\$10,089,623

**OVERALL STATUS:** The UWFT UW Medicine Program (UWM) remains in yellow status and continues to execute against program timelines in spite of staffing challenges. Key milestones and dependencies were identified as part of integrated planning; this will inform the overall critical path for the program and identify areas of risk.

**Major Accomplishments:**

- We onboarded several new resources, including a Testing Lead, Organizational Change Management Lead, and UWFT UWM PMO Lead.
- The Functional team used as-is flows to define a full list of Medicine requirements, complete a gap analysis of existing requirements, and submit new requirements to the Program.
- Over 200 new requirements have been submitted across all end-to-end process areas.
- Significant progress was made for several key system remediation/integration efforts (Epic, Kronos, HealthPay24 and others) but with more than 70 systems being retained in the future state, there is substantial work ahead in the next quarter to meet End-to-End test cycle goals.
- Began change impact assessment
- Finalized which systems will participate in End-to-End testing, and when each of these will be ready for testing

**Key Upcoming Milestones:**

- Completing Cycle 1 End-to-End testing scenarios.

**Staffing Resources:**

- Staffing remains a high priority. Sarah Cantwell, UWM Pillar Lead left UWM in late March. Dale Matheson has stepped in as Interim Pillar Lead while a search for a replacement continues. Additionally, we are onboarding several new resources in the next quarter.
- Getting qualified applicants for FTE roles continues to be a challenge, but we've had good success finding contract-to-hire candidates through vendor partners.
- We are continuing to process budget requests to fill and maintain key roles.

**Issues and Risks:**

- Inability to fill limited-term FTE roles with qualified candidates in the timeframe needed. Contractors may need to be hired to move work forward while we continue to look for qualified FTEs (at some increased cost).
- Lack of integrated plan with dependencies and critical path makes it difficult to plan/forecast deliverables, workloads, and resource allocation.
- Finance Data Repository alignment remains a Risk as the UWFT-DAWG team continues to build out the reporting process that uses that data.
- Open issues are being managed. However some risks and delayed decisions may increase this rating (cross era reporting, customer support alignment, locations, etc.)

Dale Matheson 4/11/22

## Research Administration

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Research Administration	Ryan Green	Enterprise Systems	16	3	3	3	4	3	\$6,592,004

**OVERALL STATUS:** RA continues to be challenged with hiring and retention. We have requested and been granted additional funding to hire five contractors to help recover. The screening/interview process is in progress and we look to fill these positions within the next 10 days.

We have identified the following critical assumptions and dependencies and are monitoring and mitigating those along with risks and issues:

- Financial Data Model (FDM) & data mappings 100% completed in order to finish development by the start of E2E Testing - in progress (RA to enter E2E in July)
- Financial Data Repository (FDR) - Grants data completed in order to finish development by end-to-end testing - in progress (RA to enter E2E in July)

*Note:* some key dependencies for ongoing success in operations of research administration continue to be deferred because of UWFT work (e.g. Compliance Systems Integration & Unique Researcher ID (ORCID)).

**Major Accomplishments:**

- Reviewed and approved End to End Testing Plan
- Award Intake form (first iteration) completed
- Sponsor data made available to SAGE

**Key Upcoming Milestones:**

- Commence SAGE Budget Work
- Complete SAGE: Award Set up development and Integrations
- Continue to refine eventing and queueing

**Staffing Resources:**

- Unexpected resource departures have decreased working capacity - contractors are onboarding for short term and we continue to recruit long term hires (continuing challenge)

**Issues and Risks:**

- ORIS operational needs and requirements continue to exist creating resource contention with UWFT remediation work.
- Critical assumptions and dependencies with FDM and FDR, as noted above.
- Critical Operational impacts continue to impact velocity.

Ryan Green, April 8, 2022



## Finance Readiness Program

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Finance Readiness Program	Jeanne Marie Isola	Enterprise Systems	16	2	4	3	4	3	\$5,866,683

**OVERALL STATUS:** FRP currently consists of four major workstreams that include Technical readiness, Operational readiness, Communications, and our PMO. All of our workstreams are progressing and dashboards/reports have been developed in collaboration with the EPMO to help track and monitor the work. FRP has been working closely with other pillars to understand, collaborate, and support the cross-functional work amongst the teams that impact the larger program and UW Finance. This works includes the Support Model, End-to-End (E2E) business process design and mapping, and Systems testing and integrations.

**Major Accomplishments:**

- Defined and kicked off 11 FRP project plans that incorporated 58 system remediations and four gap applications required for "go-live"
- CFDW 0.3 release was completed and available for system remediation, Award Portal and Umbers remediation continue to keep progressing
- Hired and onboarded five new employees including our Communications Lead, Retirement PM, Change Management Lead, and Program Ops Analyst
- Mapped over 4000 current state data fields to new Workday FDM data fields
- Partnered with Functional team to pilot business process document to support UW Finance readiness and change management activities

**Key Upcoming Milestones:**

- Defining and operationalizing the customer service model
- Hire the key E2E Test lead, Training lead, and QA tester
- Develop E2E business process documents in coordination with Functional team

**Staffing Resources:**

- Recruiting for Test Lead, QA Tester, Training lead, three Business Analysts, one Project Manager
- All open positions have all been drafted and posted. FRP is actively recruiting to fill all roles and working diligently with vendors to recruit potential contract to hires.

**Issues and Risks:**

- Insufficient time to get E2E BPD completed in timely manner
- Delays in key milestones have led to surges in cycles 2 & 3 of testing, not enough resources to cover all the work
- Data validation in tenants
- Design requirements for system remediations

Tiffany Quatmann April 8, 2022

## Integrated Service Center

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Integrated Service Center	Greg Koester	Enterprise Systems	12	2	2	2	3	3	\$1,337,102

**OVERALL STATUS:** The ISC is yellow primarily due to resource constraints and shifting responsibilities in the UWFT E2E Cycle 1 testing

**Major Accomplishments:**

- Payroll Parallel Testing Planning is going well
- HRP Reports Remediation -
  - Completed impact analysis for known impacted reports
  - Designed updates for low performing HR/P reports identified as having significant performance issues

**Key Upcoming Milestones:**

- Continue to work with program teams to coordinate and integrate all pillar program project plans.
- Awaiting decisions regarding support model scope and program deliverable ownership.

**Staffing Resources:**

- Similar to all departments across the university, the ISC continues to experience attrition and the subsequent recruiting and on-boarding that impacts our resourcing. Our project work continues to be fluid and heavily dependent upon state statutes and regulations.
- ISC UWFT Test Lead hiring took months longer than expected. Expected start date is May 2, 2022. So far ISC has been able to absorb the UWFT E2E Testing work, but if unplanned work surfaces, both ISC and UWFT testing could be at risk due to resource impact.

**Issues and Risks:**

- House Bill 2669 testing overlaps with UWFT Cycle 1 End-to-end testing in the month of May. Previously mentioned resource risks put UWFT E2E and HB2669 testing at risk. Complications in either space could have negative impact on the other space if resources end up overly restricted. We are monitoring and will escalate as needed.

*Greg Koester 04/18/22*

UWFT Combined Program Executive Summary - 3/31/2022

UW-IT

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
UW-IT	Rob McDade	Enterprise Systems	15	3	3	3	3	3	\$4,665,388

**OVERALL STATUS:** Schedule and scope continue to be areas of concern, primarily with Service Management and reporting requirements largely still undefined, as well as increasing unplanned demands for integrations (such as eFECs replacement). Work is happening, or starting to happen, to address these concerns, but the risks remain. Other areas are continuing to see steady progress and to meet milestones as planned. Much focus has been given to identifying outstanding design decisions and dependencies, and both the Design and Technical teams are working collaboratively to address the most pressing / biggest blockers, but the Functional team's focus on addressing configuration design for the 3/31 deadline deprioritized other design decisions. As with the last report, the most significant area of concern with respect to possible net-new requirements is in Operations / Support Model. We continue to be lean on resources, and have had setbacks with staff departures. Work continues to fill openings in priority order, but the need to leverage contractor resources has reduced the budgeted rating accordingly.

**Major Accomplishments:**

- Integrations team delivered on all Quality Gate goals, again
- Student system ready for participation in limited Cycle 1 End to End testing
- Finance Data Mart (nee: FDR) first hand-off from Deloitte to UW completed successfully

**Key Upcoming Milestones:**

- Point to Point testing for integrations with various remediated campus systems
- Operations Model Proecess Transformation Team (PTT) delivering decisions to enable/unblock work in Service Management

**Staffing Resources:**

- Backfills for key departures and additions for testing support - EDW SQL Developers and Business Analysts
- Staff turnover is creating additional hiring risks and loss of subject matter expertise

**Issues and Risks:**

- Continued progress on dependencies on FT decisions, but lingering outstanding decisions as we enter into End-to-End Testing cycle can have cascading impacts and possible work priority disruptions
- Operating Model for FT is still in the process of being determined / communicated and this will impact several technical services
- In areas where transformation and increased institutional maturity is required, ownership of solutions and responsibility for decision making is not clear (e.g. who owns enforcing "consistency of reporting across the organization", which is one of the intended goals of implementing the Financial Data Mart (nee: Finance Data Repository (FDR) project).
- Staffing turnover, especially of key subject matter experts, is compounding risks
- For integrations, the potential of late discovery of requirements during Point to Point testing effort may needs stop gap approaches as we complete End to End Testing Cycle 1 and get ready for Cycle 2.

Rob McDade - 07-APR-2022

## Campus Engagement

Campus Engagement	Description	Overall Risk & Health	Status
<b>Unit Readiness</b>	<i>Overall readiness of academic, medicine and administrative units</i>	Y	The Systems Design Support (SDS) retirement sessions have begun. Outside of the SDS sessions, the program has not fully defined responsibilities and processes for engaging with campus on topics such as testing and cutover.
<b>Side System Remediation</b>	<i>Overall status outside the Core Program and Enterprise Systems</i>	Y	Some campus units are behind in their deliverables and escalations are proceeding to assist them. Also working with Units to help determine best E2E cycle. Only one of 30-40 systems that need to integrate with Workday has engaged with the Program.

**OVERALL STATUS:** Units are responsible for dispositioning systems and planning/completing remediations and retirements for their systems. The Systems Design Support (SDS) retirement sessions have begun. The Technical Change Management (TCM) team has a tracking portal to understand the progress being made by the units.

- Some systems are struggling to complete design deliverables and the TCM team continues to reach out to help, including another conference with detailed information and will be holding additional workshops to support the units in various topics.
- The program Testing team and TCM are working with Units to help determine in which E2E cycle they'll participate. The TCM team is also helping connect units to the Enterprise Data Platform (EDP), Testing, and other resources.

**Major Accomplishments:**




- Completed a second technical workshop attended by 250 people with 13 sessions and 35 speakers
- Tracking and reporting on the progress for all unit remediations
- Established fields in the portal for collecting unit information on system test completion dates, complexity, impact of systems
- The TCM team has begun retirement Systems Design Sessions with the units to help with retiring systems

**Key Upcoming Milestones:**

- The testing team will work with units to define the scope of cycles 2 and 3 as well as training units on how to track defects
- The cutover team will begin work with units to begin the cutover planning process

**Issues and Risks:**

- Some campus units do not have the resources or design information necessary to complete remediations and have missed some planning deadlines. We are working with the units to understand their delivery dates and escalate where assistance is needed.
- Some estimates exceed the end of End-to-End testing and the team is working to understand whether End-to-End testing is necessary for those systems. It may be possible to enable integration testing to thoroughly test without those systems needing to complete End-to-End testing with Workday
- The program has not fully defined responsible teams and processes to engage with units on detailed E2E testing and cutover
- An expected 30-40 systems will need to integrate with the Enterprise Data Platform (EDP) to get data into Workday. Only one of those systems has engaged with the EDP and the teams continue to escalate.
- The TCM team has begun retirement Systems Design Sessions with the units to help with retiring systems.

* Oversight Level Key	** Project Health Key
1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.	 Project is on time, on budget, and within defined scope, with minimal issues. <b>Overall Risk Rating where 5-10 is Green</b>
2. OCIO approval required and regular project reporting. Quality Assurance (QA) reporting required, maybe internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight.	 Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays, cost or scope changes. <b>Overall Risk Rating where 11-17 is Yellow</b>
3. High severity and/or high risk, subject to full TSB oversight, which includes TSB approval, written reports to the TSB, periodic status reports to the TSB by the agency director and staff, and submission of other reports as directed by the TSB. External QA reporting required.	 Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope. <b>Overall Risk Rating where 18-25 is Red</b>

**Note for UW Medicine: project oversight levels 2 & 3 report to UW management.**

### \*\*\* IT Project Risk Ratings (summed to calculate Overall Health Rating)

Current Risk Rating	Use the scales below to rate current performance on Schedule, Scope and Budget (select appropriate number for each)...
Budget, Schedule, Scope	<ul style="list-style-type: none"> <li>1 = Performing better than project plan; ahead by 5% or more (for Schedule and Scope only)</li> <li>2 = Performance is on plan</li> <li>3 = Behind plan, but within 5% of original targets. For Budget: over <b>or</b> under spending, but within 5% of plan.</li> <li>4 = Behind plan between 6% to 10%. For Budget: over <b>or</b> under spending by 6-10%, and likely to use or using contingency.</li> <li>5 = Greater than 10% behind plan. For Budget: over <b>or</b> under spending by &gt; 10%, and more than half of full FT Program contingency is projected to be used.</li> </ul>
Current Risk Rating	Use the scale below to rate current performance on Resources
Resources	<p>People with the necessary expertise are....</p> <ul style="list-style-type: none"> <li>1 = in place, or high likelihood of being available as specified in the Resourcing Plan.</li> <li>2 = There are some minor gaps in resourcing, but can be overcome with minor alternations of the Resourcing Plan, with no significant impact on schedule, budget or deliverables.</li> <li>3 = somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables.</li> <li>4 = There are gaps in resourcing, with moderately high risk to schedule, budget or deliverables. Mitigation plans in place, or will be soon.</li> <li>5 = not in place, or low likelihood of being available per the Resource Plan. Significant impact on schedule, budget or deliverables, without mitigation plans in place.</li> </ul>
Current Risk Rating	Use the scale below to rate current impact of Issues and other factors relevant to the project (select one number for this measure)
Issues, Risks, & Project Dependencies	<ul style="list-style-type: none"> <li>1 = No risks or issues identified at this time</li> <li>2 = Some identified but minor, no impacts anticipated</li> <li>3 = Some that could impact the project are being managed, with minimal impact anticipated</li> <li>4 = Significant risks/issues/other factors identified but not yet managed</li> <li>5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope</li> </ul>