UW Enterprise IT Projects

Project Portfolio Executive Summary - 03/31/22

Project	Sponsor	Oversight Level*	Overall Risk & 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	🟡↓ (A)	🟢	🟡	🟡	🟡↓	🟡	$171,977,000	$339,906,000
Advancement CRM Replacement	Julie Brown Dan Peterson	3 - OCIO	🟡↓ (B)	🟢	🔴↓	🟢	🔴↓	🟡	$4,084,000	$4,100,000
UWM Data Analytics Warehouse	Mo Broom, Richard Goss	2 - UW	🔴↑ (C)	🔴	🔴	🔴	🟡↑	🟢↑	$4,199,000	$5,031,000
Electronic Document Management System Replacement	Anja Canfield-Budde	2- UW	🟢↑ (D)	🟢	🟢↑	🟢	🟢↑	🟡	$1,007,000	$3,006,000
Graduate School Admissions Modernization	Joy Williamson-Lott	2- UW	⚪ New	⚪	⚪	⚪	⚪	⚪	$0	$0
UWF AiMR	Tim Rhoades	1 - UW	🟢	🟢	🟢	🟢	🟢	🟢	$107,000	$403,000
Gradescope	Aaron Timss	1 - UW	🟢	🟢	🟢	🟢	🟢	🟢	$159,000	$265,000

7 projects — $181.5M | $352.7M

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.

(B) AdvCRM is trending down (by two points), and is in the process or re-baseling the budget, schedule and scope.

(C) DAWG has re-baselined Schedule and Scope to significantly improve health (by four points), and is in the process of adjusting budget.

(D) EDM has successfully re-baselined to bring health back to green (by eight points). Last quarter was yellow, and trending toward red.

04/26/22 *(over for Program Operations impacts)*

↑ Improvement over previous quarter   ↓ Setback from previous quarter

Program Operations	Executive Leadership	Program Area	Status	Major Projects Interdependencies Assessment	*Note: ISC and UW-IT resources are tracked within the major projects' budgets*
Integrated Service Center	Ann Anderson	Major Projects	🟢🟡	**Overall rating:** Green-Yellow. This rating relates to the impacts of UWFT and other new work requests to balance against current commitments. **Large Projects:** • **HB2669** – adding part-time employees to state civil service. Anticipated implementation July 1, 2022; testing scheduled to begin May thru June. • **UWFT** – The FT Program begins Cycle 1 of End-to-End testing on April 4. We are working through design recommendations in partnership with FT and have as a top priority to understand the impacts to ISC current configuration and stable processes. ISC teams have had a more active role in Cycle 1 testing than anticipated and hope to gain additional insights from the test results. (Details of the work in the FT Program are captured in the Combined FT report.) **Issues:** • Like all departments across the university, the ISC continues to experience attrition. The subsequent recruiting and on-boarding impacts our resourcing. • Our project work continues to be fluid and heavily dependent upon state statutes and regulations. • Critical to our success is the agreed upon process to submit new large project work for review by the Workday Committee for prioritization and, if needed, resourcing and funding.	
UW-IT	Andreas Bohman	Major Projects	🟡	**Overall rating:** Yellow • **Adv CRM** (UW-IT internal supporting project) – End date extended, with new go-live date still TBD. The closer the new ADV go-live date moves to FT go-live, the greater the risk of severely limited UW-IT resource availability. • **UW FT** – The amount of contributed labor required of UW-IT staff continues to increase; which could have an impact on normal operations; this is being closely monitored. Concerns around decision timelines and open questions remain. • **FT Post Go-Live** – A new Process Transformation Team (PTT) effort has started to scope and clarify the unit-level roles and responsibilities for ongoing operations, includes UW-IT representation. UW-IT is defining and sizing that work through an internal project. There will incur technical debt (future project work needed to remediate) The scope of that debt is not yet understood, but will likely be significant. • **Staffing Risks** – In addition to above, the two major projects, **UW FT** and **Adv CRM**, are at risk due to staffing.	

Completed Projects - Mar 31, 2020					
Project	Sponsor	Oversight Level*	Go Live Date	Project Completion Date	Total Project Cost ($K)
Clinical Trials Management System	John Slattery	2-UW	Sept 13, 2021	Dec 31, 2021	$12,257,000
MSIM Online Program Management	Anind Dey	2-UW	Mar 1, 2021	Dec, 2021	$226,000
Public Records	Ann Anderson	1-UW	Oct 20, 2021	Jan, 2022	$1,050,000

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		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

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
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	*Overall readiness of academic, medicine and administrative units*	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	*Overall status outside the Core Program and Enterprise Systems*	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.

Advancement CRM Replacement

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Advancement CRM Replacement	Julie Brown Dan Peterson	**3 - OCIO**	17	2	5	2	5	3	$4,083,922	$4,100,000

STATUS: The project is reporting red for schedule and resource due to the impact of multiple staff members who left last Fall and two more who will depart in April. Completion of deliverables is slow going, with many teams having to start and stop as a result of resource constraints, dependencies, and other institutional priorities. Team have analyzed several go-live scenarios that they are considering and will discuss with leadership next month. With that, budget and potential resource requests will also be under evaluation and discussion with leadership.

REQUIREMENTS: The Business Analyst team worked with Anthology and internal UW teams to validate and demo development of the gift-loading templates.

DEVELOPMENT/CONFIGURATION: Anthology continues to fix bugs identified in testing and work on development for approved change requests. Gift loading templates were demo to key stakeholders. The development of the gift loading templates may have impact to pre-existing work; full analysis to be done in collaboration with the BA team in the coming weeks.

DATA MAPPING & MIGRATION: The team continues to work on closing priority 1 and 2 data migration bugs as well as data load testing to improve timing for cutover data migration activity.

REPORTING: Data validation resumed for several Tableau dashboards (fundraisers, appeals/campaigns, and memberships) that were pending a data model refresh. Fine tuning development work and test prepping for pledge reminders and acknowledgements. Continued development work on Export+.

SYSTEM INTEGRATION: UW-IT teams shared with Advancement a schedule of their block-out windows for the remainder of the year. The Advancement team to consider this when building the new schedule. UW-IT also identified that the hardware warranty can be purchased with an absolute deadline of July 22, 2023.
The Business Analyst team have met with UWFT stakeholders to begin requirements gathering to connect the two systems which will be for after Tandem go-live.

TESTING: Functional testing completed for 33 out of 35 sprints, and on hold for two due to integration. Data validation test cases are completed for 38 out of 39 BPDs with some testing in progress, and E2E Gift parallel test planning is underway (targeting to start in May).

TRAINING: Team is continuing to develop learning content that will be added to SAP Litmos. No major issues encountered on the new training system.

CHANGE MANAGEMENT: Team continues to refresh the intranet with new articles about the project and began planning for a general Townhall in late May.

RISKS/ISSUES: Open positions to be filled: business application support, reporting analyst, training support, and data architect. Project schedule will need to be rebaselined and approved with new budget.

per Julie Ngo on 04-06-22

Notes:

(B) AdvCRM is trending down (by two points), and is in the process or re-baseling the budget, schedule and scope.

UWM Data Analytics Warehouse

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
UWM Data Analytics Warehouse	Mo Broom, Richard Goss	**2 - UW**	20	5	5	5	3	2	$4,199,000	$5,031,000

Since December 2021, the team has focused on stabilization/optimization of the DAWG product, bringing initial UWM Supply Chain information into the DAWG product, planning for re-building the DAWG Test Environment, the retirement of the EDW platform, and re-baseline of the program schedule. The rebaseline will help address the budget, schedule, & scope ratings. Budget values will be updated in the next reporting period to reflect the new baseline.

Recent Activity
• Upgraded or created new servers to continue to stabilize DAWG performance.
• Conducted analysis of the DAWG product with an external vendor.
• Identified and allocated the support roles required for the DAWG product support across teams in the UWM IT Services.
• Designed and rolled out intake and incident response processes for the DAWG product.
• Submitted request for hardware and software to rebuild the DAWG Test environment starting in FY22.
• Started migration of end users off of the UWM Enterprise Data Warehouse (EDW) and initiated the EDW retirement project.
• Alignment with the UWM ITS UW Financial Transformation related efforts as it relates to the DAWG product.

Next Major Milestones
• Continue re-baseline of program schedule to include capitalization task identification and roles & responsibility identification.
• Continue incremental improvements of the existing DAWG Test environment performance.
• Start planning for the installation and activation of a new DAWG Test Environment.

Risks/Issues
• Although mostly internal labor, program costs are beyond the planned budget for FY23. Establishing a new plan to address actual and future work. Re-baselining the program.
• Understanding of UWFT requirements as it impacts the DAWG product.

Updated by Tom Guthrie 4/7/22 <reviewed by Kristal Mauritz-Miller and Rich Selenis>

Notes:

(C) DAWG has re-baselined Schedule and Scope to significantly improve health (by four points), and is in the process of adjusting budget.

Electronic Document Management System Replacement

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Electronic Document Management System Replacement	Anja Canfield-Budde	2- UW	8	1	1	1	2	3	$1,007,459	$3,006,290

Project Objective: This is the final implementation/migration phase of a project to replace the underlying technology for UW-IT's enterprise Electronic Document Mangement (EDM) service. We are replacing the legacy Oracle WebCenter (on-premises) solution with the DocFinity solution, a cloud based product from Companion Data Services (CDS), and migrating existing customers to DocFinity.

Overall Status:
Status was red the past few months, due to ongoing lack of resources on the EDM team (resignations and recruiting challenges), and to the slower pace of completion of some of the design tasks on the part of the vendor (CDS). Those ongoing issues jeopardized the original completion date (May 2022). In addition, the project scope was much larger and more complex than previously estimated (the project work could not be estimated in detail before the implementation started). An extension to the timeline of one year was approved by UW-IT. This extension includes continuing operation of the legacy system for an additional year at a cost of $235K, as well as the UW-IT labor cost,which brings this project back to green. The new timeline to finish migration of existing 18 customers is Feb, 2023, and for decommissioning the legacy system, May, 2023.

Major accomplishments:
• Migration of first out of 19 existing customers, Environmental Health and Safety: Radiation Safety Office, migrated to DocFinity successfully on 3/28/22. Migration was preceded by verifying customer requirements, demo/training and User Acceptance Testing (UAT).
• System implementation with CDS's Professional Services wrapped up in February. This completed high involvement from the vendor's end but vendor representatives are still assisting with Records Management and Migration tasks.
• Remaining customer phased migration planning is in progress and team is validating proposed order of migration with customers in early April.
• Team is continuing to work in parallel on requirements, implementation and design for multiple customers.

Next Steps:
• Confirm detailed migration schedule for Phased Customer Migration with customers in early April, and continue planned migration work.
• Renew Oracle license for another year.
• Continue integrations/Application Programming Interface (API) work and re-engage impacted departments to complete development and testing.
• Plan and implement Advanced Capture in time for Procurement migration, per migration schedule needs.

Risks & Issues:
• Only one of EDM's three vacant position have been filled late in October with a new business analyst. There is an opening for another Business Analyst and hiring is in progress.
• The Quality Assurance/Software Development Engineer in Test position was vacated by a departure in September. Short term mitigations:
• myFD team is providing temporary testing assistance for accessibility work. – in progress Long term mitigations:
• Evaluate longer term need for Quality Assurance/Software Development Engineer in Test resources given our shift from a custom user interface to a SaaS-based solution.

Snezana Popovic. 4/5/2022

Notes:

(D) EDM has successfully re-baselined to bring health back to green (by eight points). Last quarter was yellow, and trending toward red.

Graduate School Admissions Modernization

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Graduate School Admissions Modernization	Joy Williamson-Lott	2- UW	0							

Overall Summary: This project is charged with implementing a full replacement of the MyGrad (in-house built) system and will provide graduate admissions capabilities for all graduate applicants to the UW across all three campuses. Key deliverables will include improvements in efficiency, automation, accessibility, mobile device compatibility, reporting capabilities, applicant experience, and technical support. The Graduate School will fund this project, with possible additional longer-term funding support to be considered from the Provost's office.

Major Accomplishments:
- Initiated the project
- Initiated the contracting process between UW Procurement and Technolutions
- Initiated the security review process with UW CISO, including finalizing security language in the contract and reviewing technical/design documentation from the vendor
- Initiated the accessibility review process with UW Accessibility Office, including the vendor's VPAT (Volunteer Product Accessibility Template) and our accessibility user testing
- Initiated the Privacy By Design review process with UW Privacy, including completing the Data Processing Agreement with the vendor
- Initiated project communications and oversight processes, including reactivating the GTAC (Graduate Technical Advisory Committee) in a project advisory capacity

Key Upcoming Milestones:
- Complete and sign the contract with Technolutions
- Meet and begin working with project and implementation management teams at Technolutions
- Access Technolutions documentation and training materials and begin planning staff training activities
- Begin integrations planning and activities
- Begin broader communications activities to stakeholders, including introducing the project at upcoming UW forums, committees, and staff meetings

Staffing Resources:
- We've identified the core project team, and UW-IT's Jeff Parks has joined the project to serve as project manager.

Risks & Issues:
- Risk: Resource capacity and availability may be a challenge given the scope of work involved. This risk will be addressed continuously and throughout the project.
- Risk: Some business processes will be changed based upon the structure of the system selected, so some of these changes won't be known until after that selection is finalized.
- Risk: Because of the admissions process and related business cycle, there is a specific time when process changes can be made with minimal impact. Missing the planned go-live date of July 2023 would mean the next viable option is a full year later (July 2024).
- Risk: There will be several integrations between Slate and third-party/external applications, as some programs and disciplines use national applications. These include iSchool MISM, Law/LSAC, Business/Consortium, and possibly Public Health/Sophos. Business users may also have additional unique needs that will have to be included in our planning. This risk will be managed by including separate requirements during planning, working directly with these programs, working with peer institutions we've identified who have completed comparable implementations, and by working with Technolutions and likely an independent Slate consultant to be selected by the Graduate School.
- Risk: The Graduate School currently has a data transfer process in place with UW-IT Student team. We have the staff knowledge within the Graduate School to make the necessary changes, but we will need some testing support from the UW-IT student team. Additionally Schools and Colleges with systems that connect to the Graduate Schools through APIs will have dependencies on the Graduate School in order to make their changes.

Jeff Parks, April 19, 2022   **New**

UWF AiMR										
Project	**Sponsor**	**Oversight Level***	**Overall Risk & Project Health ***	**Budget Rating**	**Schedule Rating**	**Scope Rating**	**Resource Rating**	**Risk & Issues Rating**	**Actual Cost**	**Budget**
UWF AiMR	Tim Rhoades	**1 - UW**	8	1	2	1	2	2	$107,209	$402,500

The Advanced Business Automation training for the technical team has been scheduled for late May, invitations have been sent out to participants. At the end of March, the project team will be holding on-site workshops with stakeholders around work management workflows in the future state. Type and Category is still being worked out and will be fundamental to developing the new workflows. AssetWorks has provided several module demonstrations to select stakeholders. More demonstrations are being planned to help build understanding on how the new system works and how we can adjust our processes to be more efficient with the updated technology. Data loading for the Test Environment will start this month.

Ann Wold 4/14/2022

Gradescope

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Gradescope	Aaron Timss	**1 - UW**	8	2	2	2	1	1	$159,000	$265,000

Project Overview: Paul G. Allen School of Computer Science and Engineering (CSE) Gradescope SaaS solution provided by Turnitin, LLC. The project originally expanded the use of Gradescope within CSE and three other academic departments (Chemistry, Math and Applied Math), but has since grown to also included Chemical Engineering, ECE, and Statistics. The project/licenscing takes advantage of the efficiency and benefits provided by integrating Gradescope with the Canvas Learning Management System (LMS). The project is structured around a "Growth License" that opens up access to other units more broadly over time for possible university-wide adoption. GradeScope integrates with Canvas LMS in three ways: Grade Scope's Applications Programming Interface (API), a Learning Tools Interoperability (LTI)-powered "pull" interface, and a "push" interface through the GradeScope web console.

Health/Status: Project on-track

Milestones:
• Completed year 2 of the 3 year growth license
• Currently fielding possible new partnership inquiries from the iSchool and Biology department

Next Steps:
• Finalize enrollment tabulations and budgetary distribution across 8 partnering units
• Pay Year 3 invoice against the BPO on May 1st
• Continue to develop promotional strategies with Gradescope's team to expand use across campus as we enter Year 3

Risks & Issues: None identified at this time

Rebekah Hansen - 4/11/2022

Completed Projects Summary - 03/31/22

Project	Sponsor	Oversight Level*	Go Live Date	Project Completion Date	Total Project Cost ($K)
Clinical Trials Management System	John Slattery	2-UW	Sept 13, 2021	Dec 31, 2021	$12,257,000
MSIM Online Program Management	Anind Dey	2-UW	Mar 1, 2021	Dec 31, 2021	$226,000
Public Records	Ann Anderson	1-UW	Oct 20, 2021	Jan 31, 2022	$1,050,000
UWT Slate	Mentha Hynes-Wilson	1-UW	Sept 1, 2021	Oct 30, 2021	$147,000

* Oversight Level Key
1. Overseen by UW management and staff.   Requires OCIO approval and reporting if over delegated authority.

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.

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.

** Project Health Key	
🟢	Project is on time, on budget, and within defined scope, with minimal issues. **Overall Risk Rating where 5-10 is Green**
🟡	Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays, cost or scope changes. **Overall Risk Rating where 11-17 is Yellow**
🔴	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. **Overall Risk Rating where 18-25 is Red**

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	1 = Performing better than project plan; ahead by 5% or more (Schedule and Scope only) 2 = Performance is on plan 3 = Behind plan, but within 5% of original targets. For Budget, over _or_ under spending within 5% of plan. 4 = Behind plan between 6% to 10%. For Budget, over _or_ under spending by 6-10%, and likely to use/using contingency. 5 = Greater than 10% behind plan. For Budget, over or under spending by > 10%, and more than half of contingency is projected to be used.
Current Risk Rating	Use the scale below to rate current performance on Resources
Resources	People with the necessary expertise are.... 1 = in place, or high likelihood of being available as specified in the Resourcing Plan. 2 = There are some minor gaps in resourcing, but can be overcome with minor alternations of Resourcing Plan, with no significant impact on schedule, budget or deliverables. 3 = somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables. 4 = There are gaps in resourcing, with moderately high risk to schedule, budget or deliverables. Mitigation plans in place, or will be soon. 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.
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	1 = No risks or issues identified at this time 2 = Some identified but minor, no impacts anticipated 3 = Some that could impact the project are being managed, with minimal impact anticipated 4 = Significant risks/issues/other factors identified but not yet managed 5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope