

UW Enterprise IT Projects

Project Portfolio Executive Summary - 6/30/2022

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)						\$193,166,000	\$339,906,000
Advancement CRM Replacement	Julie Brown Dan Peterson	3 - OCIO							\$4,136,000	\$4,100,000
UWM Data Analytics Warehouse	Mo Broom, Richard Goss	2 - UW							\$4,435,000	\$5,031,000
Electronic Document Management System Replacement	Anja Canfield- Budde	2- UW							\$1,257,000	\$3,006,000
Graduate School Admissions Modernization	Joy Williamson- Lott	2- UW							\$30,000	\$545,000
UWF AiMR	Tim Rhoades	1 - UW							\$124,000	\$403,000
Gradescope	Aaron Timss	1 - UW							\$160,000	\$265,000

7 projects

\$203.3M

\$353.3M

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.






Program Operations	Executive Leadership	Program Area	Status	Major Projects Interdependencies Assessment	<i>Note: ISC and UW-IT resources are tracked within the major projects' budgets</i>
Integrated Service Center	Ann Anderson	Major Projects	●	<p>Overall rating: Yellow Although the ISC has numerous open projects, the largest projects are:</p> <ul style="list-style-type: none"> • House Bill 2669 - An act relating to adding part-time employees to state civil service; and amending current law. Some temporary part-time positions are changing to permanent part-time positions. Deployments completed June 29. Data conversion scheduled for August. • UW Finance Transformation – FT Program work and updates are captured in the FT Pillar updates (in the Combined FT Quarterly Report). • HR Hierarchies – As part of UW Finance Transformation in Workday, the UW's financial Organization Code (“Fin Org”) is being retired and replaced by a Workday Custom Organization (aka Alternative Hierarchy) to capture UWHR's institutional reporting hierarchy. <p>Issues:</p> <ul style="list-style-type: none"> • Similar to all departments across the university, the ISC is experiencing attrition and the subsequent recruiting and on-boarding that impacts our resourcing. The ISC lost five more staff members in the last quarter. • Our project work continues to be fluid and heavily dependent upon state statutes and regulations. Any new large project work is submitted and reviewed by the Workday Committee for prioritization and, if needed, resourcing and funding. • The yellow rating is based on the impacts of UW-FT we are working through, some unknown issues remain as the program continues their work and we anticipate design recommendations regarding impacts to our current configuration and processes. 	
UW-IT	Andreas Bohman	Major Projects	●	<p>Overall rating: Yellow</p> <ul style="list-style-type: none"> • Advancement CRM project has a new go-live timeframe for April 2023, exact date TBD. Monitoring for impacts due to overlap with FT deployment window. All UW-IT work is currently on track. • FT Post Go-Live: UWFT Sponsors are engaged in setting the direction of the sustainment model for the Workday platform after Workday Financials go-live. UW-IT is participating in brainstorming options and solutions. • UWFT: UW-IT's contributed labor to this program continues to increase, so we are closely watching the impact on operations. With many more UW systems moving into the last testing cycle, and many systems not yet scheduled for testing, UW-IT is concerned about our ability to address defects. 	

UW Enterprise IT Projects

* 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 of 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 of 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 of 18-25 is Red

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		14	2	3	3	3	3	\$193,166,000	\$339,906,000
Functional	Paula Ross	Program	15	2	3	3	4	3	\$19,734,168	--
Technical	Gail Rogers	Program	17	2	4	4	3	4	\$30,629,092	--
Change Management	Jeff Bishop	Program	5	1	1	1	1	1	\$5,645,183	--
Project Management	Elise Barho	Program	14	2	3	3	3	3	\$5,069,397	--

Enterprise Systems Remediation

UW Medicine	Sarah Cantwell		15	4	3	2	3	3	\$13,614,818	--
Research Administration	Suzanne May		16	2	4	4	3	3	\$7,737,499	--
Finance Readiness Program	Jeanne Marie Isola		16	2	4	3	3	4	\$6,977,697	--
Integrated Service Center	Greg Koester		14	2	2	2	4	4	\$1,812,445	--
UW-IT	Rob McDade		16	2	4	4	3	3	\$5,320,852	--

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

Unit Readiness	<i>Overall readiness of academic, medicine and administrative units</i>	Y	The program created an enhanced engagement plan for the units which enables prioritization of critical issues and allocates resources across pillars to address those items. Two testing resources have been assigned to the units. The Systems Design Support (SDS) retirement sessions have also begun. Cutover resources have not been allocated for the units.
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 as well as working with them to help determine which E2E cycle they will participate in. Few of the 30-40 inbound systems that need to integrate with Workday has engaged with the platform.

The program remains in YELLOW status. End-to-end testing for the July 2023 release began as scheduled last week. Adaptive User Acceptance Testing (UAT) is completed, and the team is now focused on Financial Data Model (FDM) translation mapping, reports and training in preparation for the August R1 deployment. Vacancies in key areas (within the program and in operations) are impacting some areas. The teams are reviewing scope with stakeholders and any potential changes will be routed through the appropriate governance.

Updated 07/22/22, 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.
--

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	13	3	2	2	3	3	\$4,135,981	\$4,100,000

OVERALL STATUS: The executive steering committee approved a new go-live date to be near April 2023, with the exact date to be determined closer to that month. Advance and the Advancement community, as well as external partners and stakeholders have been informed of the date shift. Budget and schedule are under review to reflect the new go-live date. A new budget is expected to be approved by our chief operating & budget officer (also the project co-sponsor). The team is also convening in August to review and adjust the cutover plan. Since the last report, the project team has filled five positions.

REQUIREMENTS: The Business Analyst team and the vendor (Anthology) are working on getting the gift-loading templates (matching files and membership work) to demo-ready state for review with stakeholders in mid-July.

DEVELOPMENT/CONFIGURATION: The vendor continues to fix bugs identified in testing and work on development for approved change requests. They supported the configuration of Azure Synapse on two of the Dynamics environments in order to retire Dynamics Export Service (DES). Azure Synapse on the last environment to determine success is currently underway. Vendor started work on writing audits.

DATA MAPPING & MIGRATION: Continuing work on closing priority 1 and 2 data migration bugs. A couple runs with full Advance (old CRM) data load to Tandem (new CRM) in the development environment were conducted and the team is now working on a full data load to the test environment. This process typically takes five days with coordination of effort from the data migration team, vendor, and UW-IT (one step of 13 steps). Office of Sponsored Projects grant work is now in progress. Team lead is working with HR to relist the data architect position under a different position title; exact title is to be determined.

REPORTING: Development and User Acceptance Testing is complete for several dashboards: membership, campaigns and appeals, stewardship recognition. Development is completed for three reports. Export+ (an international application reporting tool) is nearing completion for refactoring to work with Tandem. Continued progress on extract and script migration. Interim reporting lead appointed.

SYSTEM INTEGRATION:

- UW-IT teams shared with Advancement a schedule of their block-out windows for the remainder of the year, which will be considered when building the new schedule.
- UW-IT determined that the hardware warranty can be purchased with an absolute deadline in July, 2023.
- The Business Analyst team has met with UWFT stakeholders to begin requirements gathering to connect the two systems, which will take place after Tandem go-live.

TESTING: Functional testing completed for 33 out of 35 sprints, and on hold for two due to integration. Most functional test writing is completed for gift loading work. Data validation test cases are completed for 38 out of 39 Business Process Documents with some testing in progress. QA test position filled; onboarding is in progress.

TRAINING: Team is continuing to develop learning content that will be added to SAP Litmos (the training learning management system where our users will go to take their training). No major issues encountered on the new training system. The new training system was briefly demonstrated to our user audience at a CRM townhall and it was received positively.

CHANGE MANAGEMENT: Conducted a CRM townhall in June. Team reviewed go-live readiness survey results and planning is underway for additional demos in late Fall.

RISKS/ISSUES:

- Open positions to be filled: reporting lead, training support, and data architect.
- DES Conversion to Azure Synapse holding up system remediation work and report testing validation.

per Julie Ngo on 07-08-22

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	14	4	3	3	2	2	\$4,435,000	\$5,031,000

Overall Status: Over the quarter the project team has made significant progress in refining scope and deliverables with clearer path to project completion. Through detailed working sessions with the UWFT team, we came to an agreement that the financial and supply chain scope that was previously assumed to be part of the DAWG program would be owned by the UWFT team. Additionally, work that had been scoped as a third phase will be owned by Analytics operations and is no longer included in the project scope. This will allow the DAWG team to move up the project completion date a full year, from Dec 2023 to Dec 2022.

Recent Activity

- Initiated planning activities for DAWG test environment server rebuild to support additional Financial users targetting Dec, 2022 completion, and accounting for a six-week vendor delay.
- Created a task force for a 6-8 week focused effort to address root cause of DAWG performance issues and development of action plans (started June, 2022)
- Initiated task force effort, establishing roles/responsibilities, communications, and prioritization, with completion of action plan by Oct, 2022.
- Deactivated access of all remaining non-ITS users on the Data Analytics Enterprise Data Warehouse (EDW) platform in June, 2022
- Began decommissioning process of the EDW platform, with focus on taking 61 prioritized servers offline by mid-July. By meeting this goal, UW Medicine will save \$1.8 million in service fees

Next Major Milestones

- Decommission EDW initial 61 prioritized servers by mid-July, 2022
- Decommission EDW remaining 62 servers (103 in total) by Oct, 2022
- Complete action plan items for DAWG performance enhancements by Oct, 2022
- DAWG Test Environment rebuild by Dec, 2022

Risks/Issues

- Too early to know when the performance task force will be able to determine the cause of performance issues.
- Global supply chain issues have impacted the current schedule due to delayed data center hardware delivery. The arrival date for the new hardware for the DAWG test environment is not assured, potentially resulting in further schedule impacts. The team is in regular communication with the vendor.

Updated by Walt Baker 7/7/22 <reviewed by Eric Neil and Rich Selenis>

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	\$1,256,939	\$3,006,290
<p>Project Objective: This is the final implementation/migration phase of a project to replace the underlying technology for UW-IT's enterprise Document Management System (DMS). 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.</p> <p>Overall Status: Phased migration of current 21 customers started late in March, with successful migration of the Environmental Health and Safety: Radiation Safety Office in March. Team is on track to complete all customers migrations in one year (by Mar 2023), and Oracle Decommissioning by the end of May 2023.</p> <p>Major accomplishments:</p> <ul style="list-style-type: none"> • Migration of Tacoma: Veteran and Military Services completed in Jun, 2022. All migrations are preceded by verifying customer requirements, demo/training and User Acceptance Testing (UAT). • Office of Academic Personnel completed trainings and UAT in June . Their migration is scheduled to complete in July. • Student Fiscal Services requirements verification and training are in progress; UAT and migration will be completed before the end of July 2022. • Current Oracle license was renewed for another year (end of May 2023). • The DMS Service Team continues to meet with several existing customers in parallel to prepare for requirements gathering and training in preparation for migration to DocFinity. • Approval received to hire a third Business Analyst which will be focused on DMS service and helping with this project. Interviews have already begun for that position. <p>Next Steps:</p> <ul style="list-style-type: none"> • Confirm detailed migration schedule for Facilities, see Issue below. • In support of Procurement's migration, training is scheduled early in August for Advanced Capture. • Continue integrations/Application Programming Interface (API) work with impacted departments which will complete development and testing. • Confirm fixes for all medium priority accessibility issues with DocFinity version 12, due later this summer. <p>Risks & Issues:</p> <ul style="list-style-type: none"> • UW Facilities team is requesting extensive evaluation and testing of the new DocFinity system before agreeing to a migration timeline. The EDMTeam is spending a lot of time to support advanced testing, well ahead of the scheduled requirements gathering and user testing. Mitigation: Project team is working on re-setting the expectations of Facilities leadership and creating a detailed plan for all migration activities which then can be used for agreement between teams. • An on-going risk: the lack of accessibility and QA expertise on the EDM Team. • A short-term mitigation of using accessibility testing assistance from the myFD Team is no longer available due to the assigned resource's resignation in June 2022. • Working hard to fill the accessibility and testing gaps. 										
Snezana Popovic. 8/10/2022										

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	8	1	2	1	2	2	\$30,240	\$545,000

Project Overview: This project will implement a full replacement of the MyGrad (in-house built) grad student admissions system with a cloud-based solution, Slate, which 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:

- Completed the contract with the solution vendor (Technolutions)
- Completed the UW CISO security review and vendor risk assessment, with no issues requiring mitigation
- Documented UW CISO's recommendations for reconsideration and reassessment during the later implementation phase
- Initiated an RFQ for a Slate implementation consultant, with meetings currently in progress with potential vendors
- Attended Technolutions' on-site conference to gather feedback and to network with the vendor, potential suppliers, and peer institutions & clients
- Attended UW's Community of Practice for Admissions to share project status and enhance collaboration with other Slate clients across the enterprise
- Began internal training for Graduate School team members using Technolutions resources
- Completed the Privacy By Design review process through UW Privacy Office, including execution of a Data Processing Agreement with Technolutions

Key Upcoming Milestones:

- Complete the RFQ and procurement of consulting resources
- Begin the business analysis phase, including change management and communications activities
- Begin integrations planning and activities with guidance from implementation consultant
- Continue broader communications with stakeholders and key resources in schools and departments
- Resume accessibility testing activities informed by business analysis outputs and consultant input

Staffing Resources:

- Hired a new Associate Director of Graduate Enrollment Management Services, who is now part of the core project team

Risks & Issues:

- *Risk:* Resource capacity and availability may be a challenge given the scope of work involved. This risk will be addressed continuously throughout the project.
- *Risk:* Some business processes will be changed based upon the structure of the system selected, and 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 UW graduate programs and disciplines use national applications. These include the iSchool, Law/LSAC, and possibly Public Health. 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, and by working with the vendor and likely an independent Slate consultant.
- *Risk:* The Graduate School currently has a data transfer process in place with UW-IT Student Database. Graduate School staff have technical knowledge to make the necessary changes, but some testing support is needed from UW-IT.
- *Risk:* 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, 7/7/2022

Project Portfolio Executive Summary - 6/30/2022

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	9	1	2	1	2	3	\$123,745	\$402,500




The test environment has been successfully upgraded to version 13 and the initial data load has been completed. The project team is working on refining the data for the test system so they can work with stakeholders on developing workflows in version 13. At the end of May, several BIT resources attended a 16 hour Advanced Business Automation Training, which will allow us to develop more automations to streamline future workorder processes. An effort is underway to map a "clean" baseline workorder; from there, the project team will work with stakeholders to layer in the more complex workorder's to develop robust future state processes.

Ann Wold 7/12/2022

Project Portfolio Executive Summary - 6/30/2022

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	\$160,000	\$265,000
<p>Project Overview: Paul G. Allen School of Computer Science and Engineering (CSE) is implementing Gradescope, a 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 include Chemical Engineering, ECE, Statistics, and the iSchool. In addition, Biology and Physics are now testing in limited set of courses. The project/licensing 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 in three ways: GradeScope’s Applications Programming Interface (API), a Learning Tools Interoperability (LTI)-powered “pull” interface, and a “push” interface through the GradeScope web console.</p> <p>Overall Status: Project on-track</p> <p>Milestones:</p> <ul style="list-style-type: none"> • Year 3 invoice successfully paid and cost split among 8 departments • Biology began testing Gradescope • 2022 Spring (1st quarter of Year 3) saw an aggregate increase of over 1,600 users <p>Next Steps:</p> <ul style="list-style-type: none"> • Physics has expressed interest in trying Gradescope. Follow up with unit leadership. • Work with Gradescope’s team and UW-IT to determine options for Year 4 licensing based on established as well as predicted usage trends • Continue to develop promotional strategies with Gradescope’s team to expand use across campus as we progress through year 3 <p>Risks & Issues:</p> <ul style="list-style-type: none"> • None identified at this time 										
Rebekah Hansen - 7/12/2022										

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

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

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	<p>1 = Performing better than project plan; ahead by 5% or more (Schedule and Scope only)</p> <p>2 = Performance is on plan</p> <p>3 = Behind plan, but within 5% of original targets. For Budget, over or under spending within 5% of plan.</p> <p>4 = Behind plan between 6% to 10%. For Budget, over or under spending by 6-10%, and likely to use/using contingency.</p> <p>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.</p>

Current Risk Rating	Use the scale below to rate current performance on Resources
Resources	<p>People with the necessary expertise are...</p> <p>1 = in place, or high likelihood of being available as specified in the Resourcing Plan.</p> <p>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.</p> <p>3 = somewhat in place, or struggling to perform, with moderate risk to schedule, budget or deliverables.</p> <p>4 = There are gaps in resourcing, with moderately high risk to schedule, budget or deliverables. Mitigation plans in place, or will be soon.</p> <p>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.</p>

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	<p>1 = No risks or issues identified at this time</p> <p>2 = Some identified but minor, no impacts anticipated</p> <p>3 = Some that could impact the project are being managed, with minimal impact anticipated</p> <p>4 = Significant risks/issues/other factors identified but not yet managed</p> <p>5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope</p>