

## UW FT Combined Program

### Executive Summary - 9/30/22

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	●	●	●	●	●	●	\$222,534,000	\$339,906,000
<b>Functional</b>	Paula Ross	Program	●	●	●	●	↑	↓	\$22,169,403	--
<b>Technical</b>	Gail Rogers	Program	↑	●	●	↑	↑	↓	\$35,184,868	--
<b>Change Management</b>	Jeff Bishop	Program	↓	↓	↓	●	↓	●	\$6,515,729	--
<b>Project Management</b>	Elise Barho	Program	↑	●	●	↑	↑	↑	\$5,853,491	--

#### *Enterprise Systems Remediation*

<b>UW Medicine</b>	Dale Matheson	↓	↑	↓	↓	●	●	\$16,783,401	--
<b>Research Administration</b>	Suzanne May	↓	●	↓	↑	●	↓	\$9,254,680	--
<b>Finance Readiness Program</b>	Jeanne Marie Isola	●	●	●	●	●	●	\$7,992,263	--
<b>Integrated Service Center</b>	Greg Koester	↓	●	↓	●	●	●	\$2,328,281	--
<b>UW-IT</b>	Rob McDade	●	↓	↑	↑	●	↓	\$6,027,385	--

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

<b>Unit Readiness</b>	<i>Overall readiness of academic, medicine and administrative units</i>	●	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.
<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 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.

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

† 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.

**Notes:**

(A) Overall, FT has the same Overall health. It is likely to move up and down a few points, and generally stay yellow through go-live.

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**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	14	2	3	3	3	3	\$222,534,000	\$339,906,000

Functional	Paula Ross	Program	15	2	3	3	3	4	\$22,169,403	--
Technical	Gail Rogers	Program	16	2	4	3	2	5	\$35,184,868	--
Change Management	Jeff Bishop	Program	8	2	2	1	2	1	\$6,515,729	--
Project Management	Elise Barho	Program	10	2	3	2	1	2	\$5,853,491	--

*Enterprise Systems Remediation*

UW Medicine	Dale Matheson		16	3	4	3	3	3	\$16,783,401	--
Research Administration	Suzanne May		17	2	5	3	3	4	\$9,254,680	--
Finance Readiness Program	Jeanne Marie Isola		16	2	4	3	3	4	\$7,992,263	--
Integrated Service Center	Greg Koester		15	2	3	2	4	4	\$2,328,281	--
UW-IT	Rob McDade		16	3	3	3	3	4	\$6,027,385	--

*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 (E2E) Cycle 3 testing kicked off on October 3rd and we are running slightly behind schedule. Our first Payroll Parallel test is also underway and is on schedule for an on-time completion. We will be executing an additional Payroll Parallel cycle once completed. We continue to see the number of systems and integrations scheduled for E2E Cycle 3 reducing as Pillars and units prioritize the completion of tier 1 systems. Work on the future state sustainment model is reaching a critical stage and is now the highest priority for the program.

Updated 10/14/22, by Christopher Mercer

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**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	3	4	\$22,169,403

**OVERALL STATUS:** The UWFT Functional pillar continues to be in yellow status due a number of competing priorities. The team is focused on key deliverables including the completion of business process flow documentation, end to end (E2E) cycle 3 testing and defect resolution, the support of other pillars in the areas of system remediation, integration development, training development and operating model.

**Major Accomplishments:**

- Completed E2E Cycle 2 testing
- Completed tenant build 4.0 configuration and data validation.
- Developed wave 1 Workday reports
- Completed user acceptance testing of Adaptive Planning, completed training for initial group of users and deployed Release 1 of Adaptive production environment
- Work with UW Medicine to understand needs related to Operating model
- Started HRP Process Transformation Team
- Developed error handling matrix to be used in discussions related to post-production support
- Started knowledge transfer process to ensure UW analysts are well-trained to conduct post-production support of the FIN module

**Key Upcoming Milestones:**

- Complete E2E Cycle 3 testing
- Finish E2E process documentation for prioritized processes
- Close out remaining open design decisions
- Complete E2E Cycle 3 testing
- Complete architect phase for Release 2 of Adaptive Planning
- Conduct deep dive sessions related to future state design
- Start process for the development of automated testing for Finance module
- Start unit outreach related to open accounts receivable as part of cutover

**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 10/17/2022

**Technical**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Technical	Gail Rogers	Program	16	2	4	3	2	5	\$35,184,868

**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 14th release of data. 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 5.0 tenant, and developing a joint data repository for Academy and UWM customers. We are well underway with the Systems Design Support (SDS) program for assisting systems retirements. We have a cutover lead that is working with each system to plan for cutover. The implementation of Huron's Employee Compensation Compliance (ECC) tool to replace eFECS is underway targeting Cycle 3 of End to End (E2E) testing.

**Major Accomplishments:**

- EDP Finance Web Service (FWS) and Operational Data Store (UWODS) releases 11-13 completed
- E2E Cycle 2 testing completed for HR/P - Integrations, SDB, and UW Connect Intake Forms
- Engaging with all campus tier 1 systems every 2 weeks and tier 2 systems monthly to help resolve issues and track progress
- Retirement SDS sessions completed for several legacy systems
- FDR knowledge transfer completion. Internal team members now support FDR updates
- Position budgeting high-level design and estimate complete for EDP to complete work

**Key Upcoming Milestones:**

- Build for Tenant 5.0
- EDP releases 14-16
- Core Data Hierarchy Management (CDHM) completion for Sage/ASTRA
- Data archiving plan completions for various systems retirements
- FTT Cycle 3 testing for HR/P - Integrations, SDB, Intake Forms, CDHM, ECC

**Staffing Resources:**

**Issues and Risks:**

- FTT has a number of issues and risks that are keeping the pillar at a higher rating. We are making progress on many of them but new items continue to arise.
- 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 Payroll integrations running late and timeline to finish testing
- Technical scope impact for the HR Hierarchy is not fully known
- E2E Testing scope for Cycle 3 is over 5 times previous cycles and many systems will not test until the System Remediation and Integration Test (SIRT) cycle Jan-Mar next year
- Minimal customer systems have connected to the EDP for inbound Workday transactions (30-40 are expected)
- Tenants used for development testing and E2E testing are not in sync and require ongoing research to determine impacts of differences
- Non-Workday reporting scope continues to be undefined

## 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	8	2	2	1	2	1	\$6,515,729

**OVERALL STATUS:** We are on track with all Organizational Change Management (OCM) work at this time. Adaptive Rel 1 training and deployment was successful. The training team has successfully transitioned from training design into build. We have launched the Workday finance and supply chain security role mapping activity with all UWA and UWM units - due end of December.

**Major Accomplishments:**

- Finalized **Readiness Survey Results** and developed action plans - provided readout to leadership
- Finalized **all Workday course designs**
- Completed **Adaptive R1 Wave 1 Training**
- Conducted **Finance Literacy Session #2**
- Launched **What's Changing?** series with URLs and Change Agents
- Launched **Workday Security Role Mapping exercise** with all units

**Key Upcoming Milestones:**

- Launch **UWA Power Users**
- Complete **Adaptive R1 Wave 2 Training**
- Conduct **On the Horizon sessions** (process walk throughs, system demos and change impacts)
- Complete **Workday Security Role Mapping exercise** with all units

**Staffing Resources:**

- We have recently had two Change Manager resources resign and are actively interviewing contractor replacements and should have the positions filled by early November.

**Scope:**

- We have transferred ownership of the *UW Connect* training development and delivery to the FTT Change Team. They will handle it from now on.

**Issues and Risks:**

- Risk: Still the risk of the Design team not making training development support a priority, which may delay training build.

*Jeff Bishop, Oct 22, 2022*

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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	10	2	3	2	1	2	\$5,853,491

**Overall Status:** The UWFT Program is in the Test stage and EPMO is focuses on testing, change control, tenant management, and cutover. End-to-End Cycle 3 testing has commenced utilizing Tenant 4.0. Progress is slow as the pillar teams focus on completing their builds (systems, integrations, etc.) and loading their associated testing scripts. The team is focusing on understanding the scope and expectations for post Cycle 3 testing. Progress is being made with Units to prepare them for testing of their systems.

**Major Accomplishments:**

- E2E Cycle 2 Testing completed, all targets met or plans developed, closure report signed off, lessons learned documented.
- Developed and signed off on Payroll Compare test plan. Execution of Payroll Test 1 in process.
- Workday Report dashboard developed
- Tenant 4.0 built
- Change Control in place across the program for defined object. Configuration change control process developed.
- Unit system dashboard drafted.

**Key Upcoming Milestones:**

- Develop RTM Dashboard
- Enhance WD Report dashboard ot include non-Workday reports
- Complete E2E Cycle 3 testing.
- Develop UAT Plan
- Develop plan for post E2E Cycle 3 testing
- Sign-off on Payroll Test 1
- Tenant 5.0 build plan
- Cutover Plan desktop rehearsal

**Staffing Resources:**

- The EPMO is fully staffed.

**Issues and Risks:**

- The EPMO is concerned about object change control and transport. The lack of structure and transparency is concerning and could have deleterious impacts on testing.

Updated: Elise Barho. 10/17/22

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**UW Medicine**

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
UW Medicine	Dale Matheson	Enterprise Systems	16	3	4	3	3	3	\$16,783,401

**OVERALL STATUS:** The UWFT UW Medicine Program (UWM) remains in yellow status but showed signs of increased risk during the past period. Increased pressure on schedule, and recently identified scope issues, are the primary source of the raised concern.

**Major Accomplishments:**

- We onboarded several new resources, including new Conversion and ITS Technical Leads for UWM.
- The Functional team used future state flows, and UWM specific requirements/user stories, to create test scenarios for Cycles 3. Efforts continue in a few areas to finalize requirements/design activities.
- Significant progress was made for several important system remediation/integration efforts (Epic, Kronos, HealthPay24 and others). UWM was able to test these key systems in End-to-End (E2E) testing Cycle 2. Significant work remains to complete remediation/integration efforts of remaining systems for Cycle 3.
- Continued the change impact assessment in preparation for future Org Change Management communication, training, cutover, and support activities.
- Conducted all planned UWM Cycle 1 and 2 test scenarios.

**Key Upcoming Milestones:**

- Finalize all Workday process flows and begin development of non-Workday, and UWM detailed process flows.
- Execute all planned Cycle 3 E2E testing
- Complete Impact Assessment
- Begin Cutover Plan development

**Staffing Resources:**

- Staffing improved this period with the filling of all key resource needs for UWM. There continues to be turnover and difficulty in hiring employees so contracting increases have continued to put pressure on the UWM budget.
- We are continuing to process budget requests to resolve staffing cost differentials.

**Issues and Risks:**

- Lingering open design/configuration issues slow progress in some areas.
- Critical scope questions around budgeting, payroll sub-ledger, and document management remain.
- Future-state Op Model, Support Model, and Reporting Model details have slowed progress with the operational detailed design of these UWM processes.
- 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, continue to make it difficult to plan/forecast deliverables, workloads, and resource allocation across teams.

Dale Matheson 10/14/22

## Research Administration

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
Research Administration	Suzanne May	Enterprise Systems	17	2	5	3	3	4	\$9,254,680

**OVERALL STATUS:** We are in yellow status. We continue to mitigate the best we can with the current FT resourcing, however velocity has slowed. Operational priorities continue to pull ORIS contributed labor off FT. Mitigations continue with contract hires and focused prioritization of workload to prevent burnout. We will continue to strategize on staffing and focusing efforts on FT critical path items needed to support the university in the Research space to meet go live needs.

We continue to monitor the following critical assumptions and dependencies and are 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 and continue to test in E2E balancing change that causes rework.
- Financial Data Repository (FDR) - Grants data completed in order to finish development by end-to-end testing - in progress and we are able to start assessing Research data

**Major Accomplishments:**

- Users can send an Award from Sage all the way to Workday using the Research Integration Platform we continue to iterate on this development and test in E2E.
- Completed Core Data Hierarchy Management tool Proof of Concept for Sage Approvals engine work.
- Completed Cycle 2 E2E testing efforts in partnership with GA2C Team.
- Research Integration Platform Sponsor service complete.

**Key Upcoming Milestones:**

- Continue SAGE Budget Work
- Continue to work on training and communications to present to the research community as it pertains to SAGE and WD business process changes.
- Continue to refine eventing and queueing
- Complete SAGE: Award Set up development and Integrations from Workday to Sage
- Complete cycle 3 E2E testing with the program.

**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 FT velocity. Schedule mitigations continue by hiring, onboard and scoping work to critical for go live items.

Suzanne May, Oct 13, 2022



## Finance Readiness Program

Project	Leader	Program Area	Overall Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost
<b>Finance Readiness Program</b>	Jeanne Marie Isola	Enterprise Systems	16	2	4	3	3	4	\$7,992,263

**OVERALL STATUS:** FRP currently consists of four major workstreams that include Technical readiness, Operational readiness, Communications, and our PMO. All 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:**

- Hired and onboarded key roles in FRP
- Finalized key decisions on Cash Application impacting Umbers remediation (finance app for grant management process) and key Business Process Documentation (BPD)
- Merchant services ID crosswalk and integration design completed for testing
- Increased stakeholder engagement activities including Change Champions and Power users

**Key Upcoming Milestones:**

- Operationalizing the customer service and operating model as defined by sponsors
- Preparation for Supplemental Integration and Remediation Testing (SIRT) and User Acceptance Testing, as well as cutover and training
- Develop E2E business process documents in coordination with Functional team and UW Finance business owners

**Staffing Resources:**

- Hired the Test Lead, QA Tester, Developer, Trainer, 2 Business Analysts, and a Change 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 contractors

**Issues and Risks:**

- Still struggling with an insufficient amount of time to get E2E Business Process Documentation completed before go-live and this has increased with continued delay of documentation from design
- Delays in key milestones and design work have led to surges in Cycle 3 of testing, not enough resources to cover all the work, and systems have been pushed back to SIRT
- Lack of true E2E testing in high risk areas across pillars will lead to gaps of understanding
- Resource constraints still remain a significant issue as we have delayed testing of systems to cycle 3 and SIRT

*Tiffany Quatmann October 17, 2022*

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**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	15	2	3	2	4	4	\$2,328,281

**OVERALL STATUS:** The ISC is yellow primarily due to resource constraints. ISC's Application Management Team has lost three additional staff members since the last quarterly report. Recruiting has been unsuccessful. Numerous offers were accepted, then later rejected due to counter offers.

**Major Accomplishments:**

- Workday 2022 R2 and Open Enrollment 2023 preparation continues.
- Completion of UWFT End-to-End (E2E) Cycle 2

**Key Upcoming Milestones:**

- HR Organizational Hierarchies Project
- Completion of UWFT E2E Cycle 3, Payroll Parallel Testing, and Payroll Operational Testing

**Staffing Resources:**

- The ISC resource rating remains at a 4 as we continue to onboard new members to the Applications Management team, as well as recruit/hire/onboard for two open positions during the busy autumn quarter. Our project work continues to be fluid and heavily dependent upon state statutes and regulations.
- Operationally, we are preparing for Open Enrollment for 2023, Calendar Year end and the 01/01/2023 Paytable updates, which pulls resources off the FT work.

**Issues and Risks:**

- The ISC's scheduled rating is moving from 2 to 3. The ISC recently pushed out the start date for most of the operational readiness activities in our project plan due to delays in knowledge base and knowledge transfer activities (resulting from UWFT functional team staffing resource issues and sustainment decisions). Despite delays, the ISC does not yet see risk to ISC go-live readiness, assuming: 1) the ongoing and forthcoming knowledge transfer activities (Business Process Design Documents (BPDs), the HRP Remediation Config change impact documentation, UWFT's On the Horizon sessions, and the finalization of Virtual Team and HRP Remediation PTT activities) are delivered and fruitful; and 2) all config changes test out positively in end-to-end testing, payroll parallel testing, and payroll operational testing; and 3) impacts from sustainment decisions are absorbable.

Greg Koester 10/18/2022, updated 11/1/2022

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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	16	3	3	3	3	4	\$6,027,385

**OVERALL STATUS:** We have reached the point in the project where resources to backfill are more costly as contractors are the only real option. A significant volume of work is queued up for End-to-End (E2E) Test Cycle 3, and a moderate amount is also scheduled for the subsequent SIRT testing phase. The expectation is more will flow out of Cycle 3 and into SIRT as systems are found to be unready for testing as the end of the year approaches. Unplanned or late evolving demands for integrations and reporting continue to be the primary areas of most concern at this time. Work is underway to identify and address these concerns, but the risks remain and the approaching deadline provides less room and less resources available to address any that present. Other areas are continuing to see steady progress and to meet milestones as planned, including Enterprise Data Warehouse and Enterprise Web Services data deliveries. Focus on identifying outstanding design decisions and dependencies have produced results, and the process continues for the most challenging outstanding decisions with the Design and Technical teams. Work continues with the Operations / Support Model space, and progress is being made. We continue to be lean on resources, and the program's retention bonus structure has contributed to morale issues for non-FT UW-IT staff.

**Major Accomplishments:**

- Successful completion of all scheduled work for E2E Test Cycle 2
- Successfully onboarded additional clients to new Enterprise Web Service inbound-to-Workday functionality
- Completed handover from contract resourced to UW-IT resources for maintenance of new Finance Data Mart "WDFinDataMart"

**Key Upcoming Milestones:**

- E2E Test Cycle 3
- Service Management requirements finalization & build

**Staffing Resources:**

- Staffing has stabilized; key departures addressed, staff augmentation with Deloitte also being explored

**Issues and Risks:**

- Teams continue to see progress made regarding dependencies on FT decisions, but lingering outstanding decisions as we enter into E2E Testing Cycle 3 may have cascading impacts and generate additional work
- Dependency on campus unit readiness for testing limits ability to fully test integrations until those units are ready to receive the data; many units are behind preferred schedule to complete this testing. Additional SIRT phase added to catch these late units, but some are already pushing the limits of that additional window
- Lack of commitment to key project resources for future employment as program approaches end of funding period risks loss of those resources and their accumulated expertise; Program retention bonus should help mitigate, but market demand for vital roles might outweigh bonus payments
- Late discovery of requirements and gaps in Workday functionality (e.g. ability to provide budget to actual reporting for position budgets) is creating the need for stop gap approaches, in turn incurring technical and process debt; all available capacity between now and go live has been committed at this time, and any new requirements will create the need for additional funding / staffing requests

Rob McDade - 17-OCT-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 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.
<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 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.

**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 program has implemented an updated engagement plan in order to identify campus needs and escalate/resolve issues faster. This includes bi-weekly meetings with tier 1 systems and monthly meetings with tier 2 systems. We have also established an escalation path for critical campus issues.
- The program Testing team and TCM are working with Units to help determine when they will be ready to test. The TCM team is also helping connect units to the Enterprise Data Platform (EDP), Testing, and other resources.

**Major Accomplishments:**

- Launched engagement plan for academic units in order to provide better and more timely answers to unit issues
- Regular meetings established with Tier 1 and 2 systems and escalations enacted for critical issues
- Two testing resources have been allocated to assist campus units
- Cutover workshop has been completed with campus units
- The TCM team has begun retirement Systems Design Sessions with the units to help with retiring systems




**Key Upcoming Milestones:**

- Forecasted test start dates need to be updated for all campus systems
- Cutover plans for unit systems

**Staffing Resources:**

**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 those systems will need extra support during the Supplemental Integration and Remediation Testing (SIRT) cycle
- The program has not defined responsible resources and processes to engage with units on cutover
- An expected 30-40 systems will need to integrate with the Enterprise Data Platform (EDP) to get data into Workday. Extremely few of those systems have engaged with the EDP and the teams continue to escalate.
- End to End system testing scope for cycle 3 is over 5 times previous cycles
- Non-Workday reporting scope continues to be undefined

* Oversight Level Key	** Project Health Key
<p>1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.</p>	 Project is on time, on budget, and within defined scope, with minimal issues. <b>Overall Risk Rating where 5-10 is Green</b>
<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>	 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>
<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>	 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	<p>1 = Performing better than project plan; ahead by 5% or more (for 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 <b>or</b> under spending, but within 5% of plan.</p> <p>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.</p> <p>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.</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 the 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>