UW FT Combined Program

Executive Summary - 12/31/22

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	Yellow ↓	Green	Yellow ↓	Yellow	Yellow	Yellow ↓	$245,019,000	$339,906,000
Functional	Paula Ross	Program	Yellow ↓	Green	Yellow ↓	Yellow	Yellow	Yellow	$24,661,047	--
Technical	Gail Rogers	Program	Yellow	Green	Yellow	Yellow	Green	Red	$39,387,953	--
Change Management	Jeff Bishop	Program	Yellow ↓	Green	Yellow ↓	Green	Green	Yellow ↓	$7,479,644	--
Project Management	Elise Barho	Program	Yellow ↓	Green	Yellow	Green	Green ↓	Green	$7,023,695	--

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	Dale Matheson		Yellow ↓	Yellow	Yellow	Yellow	Yellow	Yellow ↓	$19,657,775	--
Research Administration	Suzanne May		Red ↓	Green	Red	Yellow ↓	Yellow	Yellow	$11,142,674	--
Finance Readiness Program	Jeanne Marie Isola		Yellow ↓	Green	Red ↓	Yellow	Yellow	Yellow	$9,374,016	--
Integrated Service Center	Greg Koester		Yellow	Green	Yellow	Yellow ↓	Yellow ↑	Yellow	$2,916,977	--
UW-IT	Rob McDade		Yellow ↑	Green ↑	Yellow	Yellow	Yellow	Yellow ↑	$6,699,134	--

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

Unit Readiness	*Overall readiness of academic, medicine and administrative units*	Yellow	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.
Side System Remediation	*Overall status outside the Core Program and Enterprise Systems*	Yellow	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 likley to move up and down a few points, and generally stay yellow through go-live.

Feb 13, 2023

↑ Improvement over previous quarter   ↓ Setback from previous quarter

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	16	2	4	3	3	4	$245,019,000	$339,906,000
Functional	Paula Ross	Program	16	2	4	3	3	4	$24,661,047	--
Technical	Gail Rogers	Program	16	2	4	3	2	5	$39,387,953	--
Change Management	Jeff Bishop	Program	13	2	4	1	2	4	$7,479,644	--
Project Management	Elise Barho	Program	11	2	3	2	2	2	$7,023,695	--

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	Dale Matheson		17	3	4	3	3	4	$19,657,775	--
Research Administration	Suzanne May		18	2	5	4	3	4	$11,142,674	--
Finance Readiness Program	Jeanne Marie Isola		17	2	5	3	3	4	$9,374,016	--
Integrated Service Center	Greg Koester		15	2	3	3	3	4	$2,916,977	--
UW-IT	Rob McDade		14	2	3	3	3	3	$6,699,134	--

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

Unit Readiness	*Overall readiness of academic, medicine and administrative units*	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.
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 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 overall program status remains YELLOW. We are seeing an increase in the number of change requests. Although none of them individually are substantial in nature, the collective requests are putting additional pressure on constrained resources. The development of the future-state sustainment model remains our top issue and one of our highest priorities. We continue to push to complete E2E Cycle 3 testing and are close to 90% complete. We have planned for testing to continue over the holidays. We will continue to test Pillar and Unit systems during our Supplemental Integration and Remediation Testing (SIRT) cycle which begins on January 9th.

Updated 1/6/23, by Christopher Mercer

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	16	2	4	3	3	4	$24,661,047

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 testing and defect resolution, continued work regarding sustainment model, future state process reviews, and the support of other pillars in the areas of system remediation, integration development, training content and change impact reviews.

Major Accomplishments:
• Completed E2E Cycle 3 testing
• Finished E2E process documentation for prioritized processes
• Completed architect phase for Release 2 of Adaptive Planning
• Conducted On the Horizon deep dive sessions to showcase future state design
• Started process for the development of automated testing for Finance module using Kainos
• Started unit outreach related to month end close
• Confirmed that UW Medicine will also use Adaptive Planning such that UW will have one enterprise planning solution

Key Upcoming Milestones:
• Complete SIRT testing
• Develop UAT test scenarios
• Close out remaining open design decisions
• Complete Tenant 5 Build and Data Validation
• Conduct follow up office hours related to future state processes
• Confirm future state sustainment model structure

Staffing Resources:
• Continue to recruit for functional team vacancies

Issues and Risks:
• A number of change requests are starting to be submitted as more people understand our future state design. We will need to be thoughful in what the program can take on at this time in order to not jeopardize our go-live. Additionally, we have schedule risks associated with the delivery of remediation systems and some integrations.

Completed by Paula Ross 1/13/2023

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	$39,387,953

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 17th 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 continuing End to End (E2E) testing during the Supplemental Integration and Remediation Testing (SIRT) cycle.

Major Accomplishments:
- EDP Finance Web Service (FWS) and Operational Data Store (UWODS) releases 14-16 completed
- E2E Cycle 3 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
- Position budgeting data being built out in the EDP

Key Upcoming Milestones:
- Build for Tenant 5.0
- EDP releases 17-20 with a freeze on EDP releases in April
- Core Data Hierarchy Management (CDHM) completion for Sage/ASTRA
- Data archiving plan completions for various systems retirements
- FTT SIRT testing for HR/P - Integrations, SDB, Intake Forms, CDHM, ECC

Staffing Resources:
- We have very few positions open and resourcing is currently stable

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
- eFECS replacement (ECC) is starting very late and has risks around Payroll integrations running late and timeline to finish testing. It is currently forecasted to finish testing 4/30/23
- Technical scope impact for the HR Hierarchy is not fully known
- Not all customer systems have connected to the EDP for inbound Workday transactions (30-40 are expected). This process takes 2-4 weeks to complete and must be completed to test the systems
- Tenants used for development testing and E2E testing are not always in sync and require ongoing research to determine impacts of differences
- Non-Workday reporting scope continues to be undefined

Gail Rogers, January 6, 2023

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	2	4	1	2	4	$7,479,644

OVERALL STATUS: We are on track with most areas of Organizational Change Management (OCM) with the exception of training build. See Issues and Risks section for details.

Major Accomplishments:
 • **Launch UWA Power Users**
 • Completed **Adaptive R1 Wave 2 Training**
 • Suppoerted 15 **On the Horizon sessions** (process walk throughs, system demos and change imapcts)
 • Launched the **Workday Security Role Mapping** activity with all UW units
 • FInalized all **Workday Course Designs** and **started build** of training material

Key Upcoming Milestones:

 • Complete **Workday Security Role Mapping exercise** with all units
 • Launch the third **Change Readiness Survey**
 • **Complete Workday training material** build
 • **Map users to** their required **courses**
 • Develop the **end user training schedule**
 • Conduct **Train the Trainer**

Staffing Resources:
 • We filled the two vacated Change Manager positions and are now looking to fill the last OCM roles, two professional trainers for UWM. It is proving to be more challening than expected to find the right resoources for the rate we have budgted.

Scope:
 • No issues or changes in our OCM scope..

Issues and Risks:
 • ISSUE: The Design team has too many conflicting priorities and isn't providing the timely training support which has now delayed training build in some process areas.

Jeff Bishop, January 6, 2023

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	11	2	3	2	2	2	$7,023,695

Overall Status: The UWFT Program is in the Test stage and EPMO is focues on testing, change control, tenant management, and cutover. End-to-End Cycle 3 testing was extended to the start of SIRT to allow the pillars more time to complete testing. SIRT begins on January 9th and will focus on the key process areas of Record to Report, Grants Award to Close, and Procurement Supply Chain. In addition all system, integration, and business process testing that was not completed in a prior cycle will be tested. Work is underway on Tenant Build 5.0 the last conversion and build prior to cut-over. This build should be as close to production as possible and timings for each step will be recorded. Cut-over planning continues with follow-up work assigned across the program for any open items from the first table top read. Meetings are underway to assess the cutover requirments thorugh the lense of process areas. Change control is assessing the timeframe for enacting a frost/freeze to objects.

Major Accomplishments:
• SIRT dashboard complete
• UAT Plan drafted
• Requirements Traceability Matrix developed
• Cut-over table top read through with all teams completed, action items documented
• At risk 3rd party integrations dashboard developed
• Cycle 3 exit report drafted, awaiting results from continued testing before finalizing

Keyy Upcoming Milestones:
 • Finalize E2E Cycle 3 closure report
 • Compete Tenant 5 build
 • Complete SIRT testing
 • Complete Dress Rehearsal 1

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. 1/4/2023

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	17	3	4	3	3	4	$19,657,775

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 all remaining key roles for the UWM team, including a Cutover Lead.
 • The Functional team reviewed, and provided feedback on, the future state process flows. UWM specific requirements/user stories were used 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 complete most tests of these key systems in End-to-End (E2E) testing Cycle 3. Work remains to complete remediation/integration efforts of remaining systems including OnBase, PIMS, and Pyxis.
 • Finalized the change impact assessment for UWM non-Workday changes in preparation for future Org Change Management communication, training, cutover, and support activities.
 • Participated fully in the first Cutover table-top exercise.

Key Upcoming Milestones:
 • Finalize review of all Workday process flows and begin development of non-Workday, and UWM detailed process flows.
 • Plan and execute all planned SIRT testing for remaining requirements and systems/integrations.
 • Begin development of non-Workday training materials and courses.
 • Continue Cutover Plan development and participate in next Cutover exercise.

Staffing Resources:
 • Staffing improved this period with the filling of all planned resources for UWM. However, additional resource needs (e.g., non-Workday training developers, report writers) have been identified and additional staffing may be needed. 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 and new needs.

Issues and Risks:
 • Lingering open design/configuration issues slow progress in some areas (e.g., GHX, document management, encumbrance configuration).
 • 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).

Dale Matheson 1/6/23

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	18	2	5	4	3	4	$11,142,674

OVERALL STATUS: Overall we are red. We are behind in schedule as stated above and can no longer absorb change to requirements. Key requirement areas we are monitoring at this time for upstream change impacts:
Spend categories- monitoring GA2C team providing new cross walk for us.
PI Grant Role - tested worst case scenario of manual entry for go live. Working with Deloitte to resolve security issue however if we can't we will need to plan for manual entry
Purpose codes at Award Line level- unblocked development underway
(FDM) Function code changes coming through change control
(FDM) Region
(FDM) Hierarchy Updates in change control
SFA change request pulling resources for analysis.
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.

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 Heirachy Managment tool service for Sage Approvals engine to start developing against.
• Completed Cycle 3 E2E testing efforts in partnership with GA2C Team.
• SAGE Budget eLearning developed and released. SAGE Budget will be required at "go-live" for most SAGE users.
• Released Clinical Salary and Space Web Service remediations for SAGE to production early.
• Completed Sponsor Integration service.

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.
• Complete SAGE: Award Set up development and Integrations from Workday to Sage
• Complete SIRT E2E testing with the program.
• Prepare scripts for UAT.

Staffing Resources:
• 3 open developer positions continue to be a recruitment challenge very few candidates are coming into the pool. Decision made to not move forward with a contractor hire for FT Go Live work given the complexity and time to onboard. Strategizing with internal teams to move forward with remaining work.

Issues and Risks:
• ORIS operational needs and requirements continue to exist creating resource contention with UWFT remediation work. Mitigations continue with focused prioritization of workload to the critical path.
• Critical assumptions and dependencies with FDM and FDR, as changes continue to come in.
• Critical Operational impacts continue to impact FT velocity. Schedule mitigations continue by contingency planning and prioritizing scope of work to critical for go live items.

Suzanne May, Jan 9, 2023

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	17	2	5	3	3	4	$9,374,016

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, worked on transitioning other key roles in the Op Readiness team due to leaves and health related issues
• Continued work on the Cash Application and processes related to centralizing the functionality within UW Finance.
• Completed an Op Readiness assessment that provided insight to gaps and risks related to delay of specific downstream deliverables that FRP owns and turnover
• Kicked of key Unit Readiness teams within UW Finance that will empower the AVP stakeholders to drive and report out on work within their team to the VP of Finance

Upcoming Milestones:
• Operationalizing the customer service and operating model as defined by sponsors
• Develop contingency plans for specific priority systems in coordination with UW Finance stakeholders and UWFT PMO
• Continue cutover plans and coordination with the business unit SME's and EPMO
• Develop training plans for all FRP related systems and processes
• Finalize E2E business process documents in coordination with Functional team and UW Finance business owners

Staffing Resources:
• Hired the Test Lead, Developer, Training Lead, Business Analyst, QA role, and a Change Analyst
• 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:
• Significant delays and impact are being addressed with the delay of outcomes from the Sustainment team/model
• 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 and clarification from design. Lack of availability of team members impacts the teams ability to finalize documenation.
• Delays in key milestones and design work have led to surges in SIRT testing, not enough resources to cover all the work, and some systems have been pushed back beyond SIRT which impacts the ability to test at all
• Lack of true E2E testing in high-risk areas across pillars will lead to gaps of understanding specifically Grants and procurement

Tiffany Quatmann January 9, 2023

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	3	3	4	$2,916,977

OVERALL STATUS: The ISC is yellow primarily due to delays in knowledge transfer.

Major Accomplishments:
The ISC's role in the UWFT program has increased to include more readiness activities such as Payroll Accounting, FDM, Security, and Sustainment Model decisions. The ISC is also highly involved in cutover and go-live planning and will be participating in the upcoming UWFT Dress Rehearsals. We also anticipate increased knowledge transfer activities in the coming months as the of ownership of the remediated HRP configuration moves from the UWFT Functional team to the ISC Application Management and Cross Application Services teams.

UW HRP Reports Remediation - The HRP UWFT Report Readiness Group kickoff occurred 10/25. This group will validate high-impact reports. The ISC Reporting team has started validation of all remaining impacted reports, with outreach to campus users on individual basis (instead of defined user group). Validation will will continue through January.

Key Upcoming Milestones:
 • Completion of Payroll Operational Testing
 • Operational Readiness Planning

Staffing Resources:
The ISC resource rating moved from a 4 to a 3 in December. The Applications Management team has no resource gaps and new team members are onboarding well.

Issues and Risks:
The ISC's issues rating remains a 4 due to both delays in knowledge transfer activities (ex. documentation of FIN BPs and processes, On The Horizon Payroll sessions for Payroll were not completed in December, challenging ISC's ability to execute operational readiness activities on time), and concerns about resourcing. The ISC continues to hear about possible new areas of work ownership and responsibility and has concerns about aligning new work with the resourcing request.

Greg Koester 1/9/23

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	14	2	3	3	3	3	$6,699,134

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 queud up for SIRT Testing. Unplanned or late evolving demands for integrations and reporting continue to be the primary areas of most concern at this time as users start to engage with Workday more and realize gaps. Work is underway to identify and address these concerns, but the risks remain and with ~6 months to go-live, the runway to address these discoveries provides less room and less resources available to address any issues. 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. Work on the Sustainment model, with clairy on staffling levels for post-go-live is a vital input to allowing us to secure valuable FT resources long term.

Major Accomplishments:
• Successful completion of nearly all scheduled work for E2E Test Cycle 3 (any outstanding will be completed in SIRT phase)
• Successfully onboarded additional clients to new Enterprise Web Service inbound-to-Workday functionality
• Enterprise Data Platform R15 deployed successfully on schedule 12/05/22 - the Team's 11th and final release for the calendar year. In 2022 the team delivered 252 new UWODS Tables with 2,253 Columns (UWODS grand totals: 431 tables and 3,849 columns created in 2021 & 2022)
• First drafts of Cutover Plans completed for UW-IT participation in FT Program Cutover Planning table read exercise

Key Upcoming Milestones:
• SDB, IT Bill, ECC & HRP-I scheduled to continue testing through SIRT
• Service Management requirements finalization & build
• Continued every-four-week releases for Enterprise Data Platform
• Continued refinement of cutover planning and participation in upcoming dress rehearsals

Staffing Resources:
• Staffing has stabilized; key departures addressed; focus turning to retention and Sustainment model

Issues and Risks:
• Teams continue to see progress made regarding dependencies on FT decisions and the cascading impacts of changes to decisions made, but late-breaking changes will have cascading impacts and generate additional work / re-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. Some units expected to push the limits of SIRT testing phase 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 scope traige discussions and impact assessments

Rob McDade - 12-DEC-2022

Campus Engagement

Campus Engagement	Description	Overall Risk & Health	Status
Unit Readiness	*Overall readiness of academic, medicine and administrative units*	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.
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 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 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, monthly meetings with tier 2 systems as well as regular meetings with tier 3 systems. We have also established an escalation path for
   critical campus issues.
• The program Testing team and TCM are working with Units to help assist with their testing. The TCM team is also helping connect units to the Enterprise Data Platform (EDP), Design, Integration and other resources.

Major Accomplishments:
• Launched engagment 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
• Design change workshops have been completed with campus units
• The TCM team has continued 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
• An expected 30-40 systems will need to integrate with the Enterprise Data Platform (EDP) to get data into Workday. Few of those systems have engaged with the EDP and the teams continue to escalate.
• Non-Workday reporting scope continues to be undefined

Gail Rogers - January 6, 2023