

UW Enterprise IT Projects

Project Portfolio Executive Summary - Dec 31, 2022 (Final)

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	3 - OCIO	↓ <small>(A)</small>	●	↓	●	●	↓	\$245,019,000	\$339,906,000
Advancement CRM Replacement	Julie Brown, Tamara Josserand	3 - OCIO	●	●	●	●	●	●	\$4,665,000	\$5,533,000
UWM Data Analytics Warehouse	Mo Broom, Richard Goss	2 - UW	↑ <small>(B) Final</small>	●	↑	●	↑	↑	\$5,993,000	\$6,200,000
Electronic Document Management System Replacement	Anja Canfield-Budde	2 - UW	●	●	●	●	●	●	\$1,851,000	\$3,006,000
Salesforce Conversion	Frank Hodge	2 - UW	↓	●	●	↓	●	●	\$3,454,000	\$3,488,000
Graduate School Admissions Modernization	Joy Williamson-Lott	2 - UW	●	●	●	●	●	●	\$151,000	\$545,000
UWF AiMR	Tim Rhoades	1 - UW	●	●	↓	↑	●	↑	\$216,000	\$403,000
Gradescope	Aaron Timss	1 - UW	●	●	●	●	●	●	\$267,000	\$267,000

8 projects

\$261.6M

\$359.3M

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.
- (B) UW Medicine DAWG project is closing for purposes of the Executive Summary reports only. It will continue as one of UW Medicine's UWFT subprojects to coordinate integration of data with go live of Workday Finance; oversight by UW Medicine IT Services PMO.

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11/08/22 (over for Program Operations impacts)

↑ Improvement over previous quarter

↓ Setback from previous quarter

Program Operations	Executive Leadership	Program Area	Status	Major Projects Interdependencies Assessment	<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</p> <p>Although the ISC has numerous open projects, the largest projects are:</p> <ul style="list-style-type: none"> • UW Finance Transformation – FT Program work has increased to include more readiness activities such as Payroll Accounting, FDM, Security and Sustainment Model decisions. ISC is highly involved in cutover and go live planning and will participate in upcoming UWFT Dress Rehearsals. • HR Hierarchies – As part of the UW FT Project, the UW's financial Organization Code ("Fin Org") is being retired and replaced by a Workday Custom Organization (aka Alternative Hierarchy) to capture UW-HR's institutional reporting hierarchy. <p>Issues:</p> <ul style="list-style-type: none"> • 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 relates to the impacts of FIN (UW's legacy finance system) we are working through, some unknowns remain as the program continues their work and we anticipate design recommendations regarding impacts to our current configuration and processes. • The ISC is moving into UW-IT and planning is in process. 	
UW-IT	Andreas Bohman	Major Projects		<p>Overall rating: Yellow</p> <ul style="list-style-type: none"> • Workday Support and Operating Model: A major new focus for UW-IT is defining the future sustainment of Workday Finance (post go-live), including the transition of ISC into UW-IT. This is critical work for the University, and further increases the strain on key UW-IT resources. • Advancement CRM: (ADV) project new go-live timeframe set for April 2023, exact date TBD. Monitoring for impacts due to overlap with FT deployment window. All UW-IT work on track. • UW FT: Closely monitoring scope for UW-IT teams, as additional areas emerge that require IT solutions. 	

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* 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

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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		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

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	<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.							
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.							

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Finance Transformation Combined Program	Mark Richards, Chris Mercer		16	2	4	3	3	4	\$245,019,000	\$339,906,000

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

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.

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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, Tamara Josserand	3 - OCIO	11	2	2	2	2	3	\$4,665,160	\$5,533,217
<p>Project Overview: University Advancement must replace its two-decades-old Constituent Relationship Management (CRM) system, Advance. This old Oracle-based CRM fails to meet core and emerging user experience, business intelligence, analytics, access, security, and system integration needs for the UW. Advance will be replaced by Dynamics 365 for Sales, a CRM solution that can integrate with key UW systems (Marketo, Cvent, Tableau, Outlook, Office 365, etc), provides a unified multi-platform user experience, and that is capable of leveraging complex, extensible data structures to support more dynamic and nuanced information sharing, analysis, and constituent engagement across the enterprise.</p> <p>Overall Status: The project team is in full swing to close out remaining work before go-live in April: improving the data migration process flow, identifying and fixing bugs, building reports, testing HYDRX, modifying our software applications, partnering with our subject matter experts (SMEs) to develop training content, fine tuning our change management plan, and iterating on our cutover plan. Since the last report, the team filled two positions.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Conducted two townhalls (October 2022 and November 2022) and go-live user readiness survey as part of change management. • Completed draft of cutover plan in December 2022. • Completed testing FAS files in December 2022. Additional testing will follow standard UWIT operational process. <p>Upcoming Milestones:</p> <ul style="list-style-type: none"> • Identify and communicate go-live date by end of February 2023. • Complete cutover plan by end of February 2023. • Begin cutover activities in March 2023. <p>Risks & Issues:</p> <ul style="list-style-type: none"> • Risk: The Advance Web application is currently running on Windows 2008 Server and the OS will reach its end of extended support from Microsoft on January 10, 2023. UWIT is asking all to migrate off Window 2008 Servers and will shut down all Windows 2008 servers on March 31,2023 (before Tandem goes live). To lower security risk, team have requested Advance users to VPN in, while exploring the following options: 1) Seek exemption from UWIT to allow the Window 2008 servers for Advance CRM to stay online till May 31, 2023. 2) Migrate the Advance CRM Web application to a new supported Windows OS 										
per Julie Ngo on 01-09-23										

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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	5	1	1	1	1	1	\$5,993,000	\$6,200,000
<p>The project is preparing to close. Two of the three milestones – the Test Environment rebuild and the hand-off to operations of DAWG performance support activities – were completed during the quarter. The third and final deliverable – the decommissioning of the Enterprise Date Warehouse (EDW) servers that allow for the retirement of the legacy EDW – was completed on January 6. Next steps: DAWG Program leadership will transition support to the operations team in coordination with the interim DAWG Product Owner.</p> <p>The DAWG platform and its enhancements will continue to be governed by the Tier II Data and Analytics Oversight Committee (DAOC). To support the financial reporting needs of the UWFT Program, the DAWG-UWFT Project has been established, working closely with the DAWG Product Owner to assure the platform is ready.</p>										
<p><i>Updated by Walt Baker 1/12/23 <Reviewed by Kristal Mauritz-Miller and Rich Selenis></i></p>										Final

Notes:

(B) UW Medicine DAWG project is closing for purposes of the Executive Summary reports only. It will continue as one of UW Medicine's UWFT subprojects to coordinate integration of data with go live of Workday Finance; oversight by UW Medicine IT Services PMO.

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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	7	1	1	1	2	2	\$1,850,985	\$3,006,290

Project Objective: This is the final implementation/migration phase of a project to replace the underlying technology for UW-IT's enterprise 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.

Overall Status:

- Team have migrated thirteen customers to DocFinity and are on track to migrate the remaining seven customers by March 1, 2023. One of the current customers is migrating to a separate system, not managed by the UW-IT.
- Team is also on track to complete decommissioning of the legacy Oracle application by the end of May 2023.

Major accomplishments:

- Team completed migrations of several customers since the last quarterly report : Advancement, Dept of Physics: Curriculum documents, DRS (archival), OSFA, GCA: Cash, Library: HR, Bothell: CBLR and Executive Office.
- Only seven customers remain to be migrated before March 1st 2023, including Facilities and Procurement which are more complex migrations, and require substantial training and coordination.
- All migrations are preceded by verifying customer requirements, demo/training and User Acceptance Testing (UAT).
- EDM team continues integrations/Application Programming Interface (API) work with impacted departments which will complete development and testing.

Previously reported issues are resolved.

Snezana Popovic. 12/30/2022

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Salesforce Conversion

Project	Sponsor	Oversight Level*	Overall Risk & Project Health *	Budget Rating	Schedule Rating	Scope Rating	Resource Rating	Risk & Issues Rating	Actual Cost	Budget
Salesforce Conversion	Frank Hodge	2 - UW	13	3	3	3	1	3	\$3,453,944	\$3,488,152

Project Overview: Project migrates Foster's masters recruiting and admissions CRM from end-of-life Radius CRM to Salesforce, and full lifecycle management for our executive education certificate programs. We've also expanded use of CRM to include application and review for the undergraduate major, Writing Skills Assessment, and various program applications.

Overall Status: Schedule slipped one month (from end of Dec '22 to end of Jan '23. Executive Education's is now on Salesforce with a viable product and payment processing. Their historical data migration should be complete by March '23.

Milestones:

- Migrate Day/Evening MBA Program - Delayed due to bug in data import code. Replacement code is estimated for 2/15/2023. Admission communication remains in legacy CRM to facilitate program deadlines.
- Migrate Executive Education - Complete. EE is running a 'minimum viable product,' including payment processing, on Salesforce and is no longer using Radius.
- Complete Marketing Automation scope identified by Foster Marcomm - Delayed due to Day/Eve MBA. Revised completion by FY close.
- Legacy CRM shutdown. Rescheduled from 12/31/22 to 1/31/23.

Next Steps:

- With Executive Education on Salesforce, work has moved to completing historical data import and further automation of EE workflows. This part of the project remains on schedule and budget.
- Replacing Graduate Web Service import code is underway by Foster dev team due a failure in our duplicate record matching code from Graduate School's GWS. Refactor estimated for Feb 15th, 2023.

Risks & Issues:

- Anthology, our legacy CRM vendor offered month-to-month pricing for license extension. We exercised that option to extend to Jan 31, 2023 at an additional cost of \$7,621.11. If we are unable to complete revised data import code, one additional 30-day extension may be required. However, all programs are now working in Salesforce, and Radius shutdown is scheduled for Jan 31.

January 18, 2023 - Mick Westrick, Director of IT, Foster School of Business

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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	\$151,455	\$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 Business Process Analysis sessions with department users and subject matter experts to map processes and current state activities and configurations.
- Received and reviewed Strata Information Group's (SIG) report and findings on the BPA process, which are informing next steps including design and configuration of the application.
- Completed initial training of key UW Graduate School staff through Technolutions and SIG's recommended courses and resources.
- Identified Slate Captains, a Technolutions-defined operational role that will be filled by UW staff and be integrated into the implementation and launch activities.
- Began weekly project and technical meetings with SIG, a Slate specialist consulting firm contracted by UW to provide project management, business analysis, implementation management, and system setup services for the project.
- Completed (with SIG) the next phase of the overall project plan and timeline for activities through Q3 2023, and uploaded this to our Microsoft Teams project site for shared accessibility, visibility, and coordination.
- Scheduled initial meetings with SIG and UW's Accessibility Team for introductions and to begin planning accessibility testing and gather feedback on current UI design questions related to the student application.

Key Upcoming Milestones:

- Update the Graduate School's project website with status and key highlights for on-demand access by GTAC and UW community members.
- Finish planning change management and communications activities based on outputs from the department analysis sessions.
- Begin scoping post-launch (aka phase 2 in late 2023) work, including third-party integrations for iSchool/Noodle, Law/LSAC, Foster/Consortium, and Public Health/Sophos.
- Schedule and facilitate the next GTAC meetings, participate in and update the Admissions Community of Practice meetings, and prepare ad-hoc Graduate School presentations on project updates.

Cass Tang and Animesh Mohanty 1/30/2023

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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	10	1	3	1	3	2	\$216,000	\$402,500
<p>Project Overview: This project is focused on migration and upgrade of the AiM work management tool serving the facilities organization. Project work scheduled for 2021 – 2024 designed to remediate the AiM System for Finance Transformation, move AiM to the cloud for hosting, to update the old version of AiM (V9 to V13) currently in use, and to make configuration changes for improving standards and efficiencies for ease of use. The driver for the outcomes of this work are the needs to align the AiM system to Finance Transformation requirements, and a needs analysis conducted and completed by AssetWorks in 2019 and the 22 recommendations are used for supporting work approved by UWF executive committee.</p> <p>Major Accomplishments:</p> <ul style="list-style-type: none"> • Process mapping with stakeholders and customers • Launch AiM Test and Production environments for V13 in cloud • Establish and stabilize WAN communication for data integration • Launch design effort for ReADY request • Assign new Engagement Manager and Project Coordinator <p>Key Upcoming Milestones:</p> <ul style="list-style-type: none"> • Complete system data integration design for all AiM solutions – May 2023 • Fully remediate current “on prem” V9 AiM systems for Finance Transformation goals – June 2023 • Align AiMv13 with WD integrations for FT (pre-AiM launch) – Summer 2023 • Conduct training Facilities wide (including HFS) – September 2023 • Launch the hosted version of AiM13 organization wide - Fall 2023 • Complete planned process improvements and modernizations – Winter 2024 <p>Risk & Issues:</p> <p>Despite the replacement of key project resources in Q4 including project Engagement Manager, Project Coordinator and Customer Care team representative, in the intervening months the broader facilities group has continued to lose essential members of the project team including new Care team rep, Stores rep, and AiM Trainer. Additionally, the need to focus now on the essential aspects of remediation for Finance Transformation is shifting the priorities of the project. The effect of these two outcomes has precipitated the need to extend the project launch dates from Summer of 2023 to Winter of 2024 while the focus shifts to meeting FT needs on the On-Prem solution. The timeline shift does not impact budget which is still on track, reduces scope and risk impacts, resources remain a concern as new project resources identified and on-boarded, and does extend the schedule/timeline for project completion.</p>										
Tim Rhoades 1/23/23										

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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	\$267,000	\$267,000
<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 still on-track with budget, schedule and scope.</p> <p>Milestones:</p> <ul style="list-style-type: none"> • Entering final quarter (Wi 23) of the initial 3 year (36 mo) Growth License phase. • Threshold of 52,000 annual, aggregate student enrollments required to reach Enterprise-level adoption has not only been met, but has been exceeded! <p>Next Steps:</p> <ul style="list-style-type: none"> • Continue to work with Gradescope’s team, UW-IT, College of Engineering, and College of Arts & Sciences to evaluate and define plans for licensing in Years 4-6. • Since combined usage by units from within the College of Arts & Sciences now constitutes an overwhelming majority of UW’s total Gradescope use, Gradescope’s team plans to work with A&S leadership to potentially redirect some, if not most, of the administrative overhead that CSE has handled during the first 3 year Growth License phase. • As a direct result of our project efforts and in parallel to planning and negotiating next-phase licensing at the UW Seattle campus, UW Tacoma’s School of Engineering & Technology has begun discussion with Gradescope’s team for possible licensing at UWT. <p>Risks & Issues:</p> <ul style="list-style-type: none"> • None identified at this time 										
Rebekah Hansen - 1/6/2023										

[1] Data in this cell is not displayed (font color = white), to avoid confusion with the column heading. It actually hard-coded to contain the "Oversight Level", to be consistent with the Summary Sheet column heading.