## UW Enterprise IT Projects

### Project Portfolio Executive Summary - March 31, 2023

<table>
<thead>
<tr>
<th>Project</th>
<th>Sponsor</th>
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<th>Actual Cost</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance Transformation Combined Program</td>
<td>Mark Richards, Chris Mercer</td>
<td>3 - OCIO</td>
<td>(A)</td>
<td>(A)</td>
<td>(A)</td>
<td>(A)</td>
<td>(A)</td>
<td>(A)</td>
<td>$265,977,000</td>
<td>$339,906,000</td>
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<tr>
<td>Advancement CRM Replacement</td>
<td>Julie Brown, Tamara Josserand</td>
<td>3 - OCIO</td>
<td>↑</td>
<td>↑</td>
<td>↑</td>
<td>(B)</td>
<td>(B)</td>
<td>↑</td>
<td>$5,147,000</td>
<td>$5,533,000</td>
</tr>
<tr>
<td>Electronic Document Management System Replacement</td>
<td>Anja Canfield-Budde</td>
<td>2 - UW</td>
<td>↑</td>
<td>↑</td>
<td>↑</td>
<td>(B)</td>
<td>(B)</td>
<td>↑</td>
<td>$2,092,000</td>
<td>$3,006,000</td>
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<tr>
<td>Salesforce Conversion</td>
<td>Frank Hodge</td>
<td>2 - UW</td>
<td>↑</td>
<td>↑</td>
<td>↑</td>
<td>(B)</td>
<td>(B)</td>
<td>↑</td>
<td>$3,454,000</td>
<td>$3,488,000</td>
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<tr>
<td>Graduate School Admissions Modernization</td>
<td>Joy Williamson-Lott</td>
<td>2 - UW</td>
<td>↓</td>
<td>↓</td>
<td>↓</td>
<td>(B)</td>
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<td>$256,000</td>
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<td>UWF AIMR</td>
<td>Tim Rhoades</td>
<td>1 - UW</td>
<td>(B)</td>
<td>(B)</td>
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<td>$227,000</td>
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<td>Gradescope</td>
<td>Aaron Timss</td>
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<td>(B)</td>
<td>(B)</td>
<td>(B)</td>
<td>(B)</td>
<td>(B)</td>
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<td>$269,000</td>
<td>$267,000</td>
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<td><strong>7 projects</strong></td>
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<td></td>
<td></td>
<td></td>
<td><strong>$277.4M</strong></td>
<td><strong>$353.1M</strong></td>
</tr>
</tbody>
</table>

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) Congratulations to Gradescope team for successful completion of 3y Growth pilot project! “The established use and consistent growth demonstrates Gradescope’s significant value to UW’s teaching and learning community.”

11/08/22 (over for Program Operations impacts)  ↑ Improvement over previous quarter  ↓ Setback from previous quarter
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<tbody>
<tr>
<td>Program Operations</td>
<td>Executive Leadership</td>
<td>Program Area</td>
<td>Status</td>
<td>Major Projects Interdependencies Assessment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Integrated Service Center</td>
<td>Anja Canfield-Budd</td>
<td>Major Projects</td>
<td></td>
<td>Overall rating: Yellow</td>
<td>Although the ISC has numerous open projects, the largest projects are:</td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td>• <strong>UW Finance Transformation</strong> – 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.</td>
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<td></td>
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<td></td>
<td>• <strong>HR Hierarchies</strong> – 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.</td>
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<td></td>
<td></td>
<td>Issues:</td>
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<td></td>
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<td>• 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.</td>
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<td>• 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.</td>
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<td></td>
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<td></td>
<td>• The ISC is moving into UW-IT and planning is in process.</td>
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</tr>
<tr>
<td>UW-IT</td>
<td>Andreas Bohman</td>
<td>Major Projects</td>
<td></td>
<td>Overall rating: Yellow</td>
<td></td>
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<td></td>
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<td></td>
<td>• <strong>Workday Support and Operating Model:</strong> Workday Support and Operating Model: New governance for the HR &amp; Finance Applications kicked off. ISC transitioned into UW-IT, sustainment hiring underway.</td>
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<td></td>
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<td></td>
<td>• <strong>Advancement CRM:</strong> Advancement CRM (ADV) go-live May 2. All UW-IT work on track.</td>
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<td>• <strong>UWFT:</strong> Go-live prep and monitoring for clarity on biennium cross-over, cut-over plans and deferred work.</td>
<td>Note: ISC and UW-IT resources are tracked within the major projects’ budgets</td>
<td></td>
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**UW Enterprise IT Projects**

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### *Oversight Level Key*

1. Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.
   - **Overall Risk Rating of 5-10 is Green**

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.
   - **Overall Risk Rating of 11-17 is Yellow**

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.
   - **Overall Risk Rating of 18-25 is Red**

### *Project Health Key*

- Project is on time, on budget, and within defined scope, with minimal issues. **Project has the potential for delays, cost or scope changes.**
- **Overall Risk Rating of 5-10 is Green**
- Changes to scope, budget, or resources have placed project at some risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope. **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. **Project has the potential for delays, cost or scope changes.**
- **Overall Risk Rating of 18-25 is Red**
**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.

**Overall Status:** The project is still aiming to cutover to the new system in late April. There are mitigation plans in place for work that have been approved to move past go live and communications are in place for impacted stakeholders. All open CRM positions are filled.

**Major Accomplishments:**
- Released Training environment to 400+ users.
- Released training materials to users in ALP (Advancement Learning Platform), our online learning system.
- Hypercare support model currently in practice.

**Upcoming Milestones:**
- Continue with cutover communications
- Cutover to Tandem!

**Risks & Issues:**
- No major ones identified at this time

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**Advancement CRM Replacement**

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<td>Julie Brown, Tamara Josserand</td>
<td>3 - OCIO</td>
<td>9</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>$5,146,972</td>
<td>$5,533,217</td>
</tr>
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per Julie Ngo on 04-07-23
Project Portfolio Executive Summary - March 31, 2023

Electronic Document Management System Replacement

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<tr>
<td>Electronic Document Management System Replacement</td>
<td>Anja Canfield-Budde</td>
<td>2 - UW</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>$2,091,624</td>
<td>$3,006,290</td>
</tr>
</tbody>
</table>

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.

We are pleased to announce that we have migrated ALL twenty customers from Oracle WebCenter to DocFinity. Migration work started in May 2021 and finished today, March 7th 2023. This is a huge, successful milestone, for the EDM team, all UW departments that helped with the migration and our vendor Companion Data Services, CDS. Congratulations and thanks to all teams. Team already began decommissioning of the current Oracle WebCenter system and plan for it to be completed no later than end of May 2023. Starting in March, when you access the Oracle-based system, you might be automatically be redirected to the DocFinity system (https://edms.uw.edu/).

Snezana Popovic. 3/29/2022
Salesforce Conversion

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<tr>
<td>Salesforce Conversion</td>
<td>Frank Hodge</td>
<td>2 - UW</td>
<td>12</td>
<td>3</td>
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<td>3</td>
<td>1</td>
<td>3</td>
<td>$3,453,944</td>
<td>$3,488,152</td>
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</table>

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: All programs now on Salesforce for recruiting/admissions.

Milestones:
- Migrate Day/Evening MBA Program - Complete. Admission decision notification letter completed.
- Migrate Executive Education - Complete. EE is running a 'minimum viable product,' including payment processing, on Salesforce and is no longer using Radius.
- Legacy CRM shutdown. Completed, 1/31/23. All programs now have 'minimum viable product' on Salesforce

Next Steps:
- Employer data cleanup/import. Historical data will be imported over the next couple of months, Fields for this data exist and our 200 largest employers are already created.
- Complete Marketing Automation scope identified by Foster Marcomm. Email marketing manager onboarded in Marcomm department and working with vendor on this scope.
- Project close out / Transition to sustainment

Risks & Issues:
- Using the system's new capabilities to improve admissions and revenue forecasting
- Continue staff training to raise our institutional maturity with Salesforce

Mick Westrick, 4/5/2023
**Graduate School Admissions Modernization**

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<tr>
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<tr>
<td>Graduate School Admissions Modernization</td>
<td>Joy Williamson-Lott</td>
<td>2 - UW</td>
<td>9</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>$255,825</td>
<td>$545,000</td>
</tr>
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**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:**
- Update the Graduate School’s project website with status and key highlights for on-demand access by GTAC and UW community members.
- Begin project plan for post-launch (phase 2, late 2023) national application integration work.
- Engaged with UW Accessibility Office and worked to ensure that application components are being built with users with accessibility needs in mind.
- Developed and configured applicant profile, login logic and integrate UW branding into Slate UI.
- Basic Graduate School Application user interface has been built.
- Updated baseline estimation to included extended scope of work into Q3 (summer 2023). Documented changes including an increase in budget estimation and impact on current project timeline.

**Key Upcoming Milestones:**
- Finish planning change management and communications activities based on outputs from the department analysis sessions.
- Complete integration and testing with SDB.
- Complete Scoping post-launch (phase 2) work.
- Schedule and facilitate the Spring GTAC meetings, continue to engage and update the Admissions Community of Practice, and prepare additional presentations on project updates.
- Using current Mygrad program requirements as a baseline to update and integrate into Slate application.
- Build the framework for recommendation forms, and program selectable materials and program specific requirements.

**Staffing Resources:**
Cass Tang and Animesh Mohanty from the UW-IT PMO proving additional project management support.

Cass Tang and Animesh Mohanty 3/30/23
Project Portfolio Executive Summary - March 31, 2023

**UWF AiMR**

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<td>Tim Rhoades</td>
<td>1 - UW</td>
<td>10</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>$226,500</td>
<td>$402,500</td>
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**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.

**Major Accomplishments:**
- Account design planning for final FDM
- Test data set upload and Q&A for FT lacung
- Launch FT data integration remediation
- Staffing, Identify Contract Process Consultant, Align AiM training resource (vendor and internal partner from Maintenance and Construction)

**Key Upcoming Milestones:**
- 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 AiM organization wide - Fall 2023
- Complete planned process improvements and modernizations – Winter 2024

**Risk & Issues:**
Despite the replacement of key project resources in Q1 including Process Consultant, and AiM Trainer in March the project manager for this project resigned. Those duties have been assumed by the engagement manager and project coordinator while a replacement is sought. The focus now on the essential aspects of remediation for Finance Transformation has continued to move forward on schedule however further staffing losses could threaten the current project completion timelines and major liestones. ReADY module design planning has been placed on on hold while the cutomer care team representative and technology project manager are replaced.

Tim Rhoades 4/14/23
### Gradescope

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<td>Aaron Timss</td>
<td>1 - UW</td>
<td>8</td>
<td>2</td>
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<td>2</td>
<td>1</td>
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<td>$269,000</td>
<td>$267,000</td>
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**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.

**Overall Status:**
Initial 36 mo (3 year) project timeline complete. Slightly over projected budget due to wrapping first 3 year phase and planning for next-phase(s). Not only met, but exceeded, schedule and scope goals in terms of campus adoption. Currently, finalizing an internal MoU with College of Arts & Sciences for ongoing cost and administrative division, as well as a 4 month bridge agreement with Turnitin/Gradescope to lead into another 3 year renewal phase.

**Milestones:**
- Completed final quarter (Wi 23) of the initial 3 year (36 mo) Growth License phase.
- Year 1 of the project was based on TTM data of 29,000 aggregate enrollments (sp2019-wi2020). Year 3 ended with ~60,000 aggregate enrollments (sp2022-wi2023), doubling UW usage and smashing Gradescope’s Enterprise threshold of 51,000 in just three years.
- Adoption by units within the UW College of Arts & Sciences departments quickly grew to account for 70%-75% of total use each year.
- A & S has agreed to centrally fund 75% of UW’s annual Gradescope costs going forward. CSE will organize cost-sharing for units within the College of Engineering for now.
- The established use and consistent growth demonstrates Gradescope’s significant value to UW’s teaching and learning community

**Next Steps:**
- Finalize MoU with College of Arts & Sciences to cement cost-sharing, division of administrative and promotional efforts going forward.
- Finalize 4 month bridge agreement with Gradescope/Turnitin (to be invoiced 5/1/2023 with price based on sp2022-su2022 trailing data) to avoid disruption to service midway through the academic year and to ultimate reposition invoicing and licensing schedules to align more closely with UW’s academic calendar. This bridge also will provide more lead time to implement the next three year full license renewal in Au2023.
- Gradescope/Turnitin working with College of the Environment towards testing and adoption
- CSE working with ME and CEE towards further adoption across the CoE

**Risks & Issues:**
- None identified at this time

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Rebekah Hansen - 4/11/2023

(B) Congratulations to Gradescope team for successful completion of 3y Growth pilot project! "The established use and consistent growth demonstrates Gradescope’s significant value to UW's teaching and learning community."