

# Executive Sponsors Meeting Business Area – Portfolios

02/11/2019

## Portfolios

- Academic Operations
- Business Operations
- Capital Planning
- Graduate Education
- Human Resources
- Information Technology Services
- Marketing and Communications
- Office of the Provost
- Public Safety
- Research and Economic Engagement
- Student Affairs & Athletics
- University Advancement
- University Financials

# Academic Operations Portfolio Overview

## **Portfolio Overview:**

The Academic Operations Portfolio is primarily comprised of Admissions, Student Financial Aid, and Registration and Records projects to enhance existing processes.

## **Portfolio Health:**

The majority of the projects in this Portfolio that have started are “On Schedule”.

The Slate Implementation - Undergraduate Admissions Phase 2, and Slate - Consistent Student Residency data project will be implemented in February 2019.

The PeopleSoft CSS PeopleTools 8.56 Upgrade & Get Current project is just getting started with a implementation in May 2019.

The Scholarship Maintenance Updates - BGFA020 is being tested and will be implemented in March 2019.

**ESC Portfolio Sponsor:** Cecilia Castellano

**ITS Portfolio Manager:** Todd Glick

# Academic Operations Portfolio Composition

Name	ESC Priority	Project Subtype	Status Name	Start	End	Percent Complete	Manager	Acct/Dept	Sponsor
Territory Report		Enhancement	On Schedule	9/27/2018	11/29/2018	50%	Bridget Place	Financial Aid	Jerry Ameling
Slate Implementation - Undergraduate Admissions Phase 2	1	Project	On Schedule	5/1/2018	2/17/2019	90%	Margo Kammeyer	Admissions Office	Dustin Sabo
NSC Interface Modifications	1	Project	On Schedule	1/2/2018	3/3/2019	85%	Sue Tomor	Registrar	Sue Lau
Scholarship Maintenance Updates - BGFA020	1	Project	On Schedule	12/10/2018	3/3/2019	67%	Todd Glick	Financial Aid	John Eggenton
Slate - Consistent Student Residency data		Enhancement	On Schedule	8/13/2018	3/31/2019	76%	Todd Glick	Registrar	Jamie Daughton
Update Labels on Packaging Variables CSS Page		Enhancement	On Schedule	1/7/2019	6/2/2019	56%	Todd Glick	Financial Aid	John Eggenton
PeopleSoft CSS PeopleTools 8.56 Upgrade & Get Current	ASAP	Project	On Schedule	12/17/2018	6/28/2019	15%	Margo Kammeyer	Registrar	Sue Lau
Revise Room Allotment Reports	2	Project	On Schedule	1/1/2019	8/15/2019	5%	Adam Petrea	Registrar	Kathy Dean
Automate Transcript Requests from ATC	1	Project	On Schedule	4/1/2018	9/30/2019	30%	Margo Kammeyer	Registrar	Rachel Schaeffer
CSS to Slate Import: Holds, Enrollment, Email		Enhancement	On Hold	10/1/2018	3/31/2019	5%	Todd Glick	Admissions Office	Angela McCutcheon
Run uAchieve Jobs for Maximum Efficiency		Enhancement	Not Started	10/18/2018	1/27/2019	0%	Todd Glick	Registrar	Rachel Schaeffer
Load Historical Data in Financial Aid ODS		Enhancement	Not Started	7/1/2018	2/28/2019	0%	Bridget Place	Financial Aid	Jerry Ameling
Persistence and Retention Report		Enhancement	Not Started	9/27/2018	2/28/2019	0%	Bridget Place	Financial Aid	Jerry Ameling
Advanced Placement Program® (AP) File Automation	1	Project	Not Started	10/1/2019	7/1/2020	0%	Sheri Thomas	Registrar	Rachel Schaeffer

# BusOps/Auxiliary Portfolio Overview

## **Portfolio Overview:**

Business Operations/Auxiliary Portfolio is largely comprised of Purchasing, Risk Management, Treasury, Dining Services, and Union projects to enhance existing processes and add new functionality.

## **Portfolio Health:**

All of the projects in this Portfolio are progressing “on schedule”. Payment Works implementation began with a day of planning to determine the scope of the project. The CBORD project is scheduled to kick off mid-February.

**ESC Portfolio Sponsor:** Sheri Stoll (Brad Leigh)

**ITS Portfolio Manager:** Mike Hachtel

# BusOps/Auxiliary Portfolio Composition



Name	ESC	Priority	Project Type	Status	Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
InfoPro - Switch from Shib to CAS for SSO			Enhancement	On Schedule		9/10/2018	12/21/2018	45%	Chris Wammes	Risk Management	Bess Huyghe
Travel agency change			Enhancement	On Schedule		12/4/2018	1/31/2019	5%	Andy Lynch	Business Operations	Phillip Worley
G2 Account software needs to be updated			Enhancement	On Schedule		1/30/2019	2/15/2019	85%	Donald Schumacher	Postal Services	Chad Warner
Create an external client login video sharing branded website			Enhancement	On Schedule		11/14/2018	3/1/2019	40%	Andy Lynch	Bowen-Thompson Student Union	Patrick Nelson
DocuSign Form Conversion with OnBase Integration			Enhancement	On Schedule		11/20/2018	3/1/2019	50%	Chris Wammes	Risk Management	Stephanie Sickler
Update Dining Services Meal Plan Process for Tuition Guarantee			Enhancement	On Schedule		11/12/2018	3/19/2019	20%	Scott Blackwood	Dining Services	Susan Reynolds
Payment Works Implementation	1		Project	On Schedule		1/7/2019	4/25/2019	5%	Andy Lynch	Business Operations	Phillip Worley
Migrate EMS to EMS Cloud	2		Project	On Schedule		5/8/2018	4/26/2019	20%	Bridget Place	Bowen-Thompson Student Union	Jeffrey Smith
FMS- Amazon Discounts via Jaggaer\nProdigy Interface			Enhancement	On Hold		8/28/2018	4/30/2019	20%	Mike Hachtel	Business Operations	Teresa Coss
Webform and notification for drone flights scheduled on campus			Enhancement	Not Started		12/3/2018	12/28/2018	0%	Chris Wammes	Risk Management	Stephanie Sickler
Webform and automatic email process for GovDeals asset purchases			Enhancement	Not Started		12/4/2018	12/28/2018	0%	Chris Wammes	Postal Services	Jeremy VanTress
Replace CBORD NetHIMS with CBORD Mobile Inventory	2		Project	Not Started		1/28/2019	3/22/2019	0%	Scott Blackwood	Dining Services	Renee Appelhans



# Capitol Planning Portfolio Overview

## **Portfolio Overview:**

The Capitol Planning Portfolio is comprised of Capitol Planning, Design and Construction, and Campus Operations projects to enhance existing processes.

## **Portfolio Health:**

This Portfolio currently has three enhancements that have not officially started. Some initial review and discussions with the vendor have taken place for the Energy Management touchscreen enhancements. The TMA key holder interface is dependent on a other system upgrades which are currently underway.

**ESC Portfolio Sponsor:** Sheri Stoll (Bruce Meyer)

**ITS Portfolio Manager:** Mike Hachtel

Green

# Capitol Planning Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Recycle Coach Implementation		Enhancement	Not Started	10/29/2018	12/14/2018	0%	Adam Petrea	Sustainability	Nicholas Hennessy
TMA Requestor - Key Holder Interface		Enhancement	Not Started	1/8/2019	2/22/2019	0%	Bridget Place	Physical Plant	Alex Pilcher
Software support for Energy Management Touch Screens		Enhancement	Not Started	11/19/2018	2/28/2019	0%	Andy Lynch	Sustainability	Nicholas Hennessy





# Graduate Education Portfolio Overview

## **Portfolio Overview:**

The Graduate Education Portfolio is largely comprised of Slate and OnBase projects to enhance existing processes. Most recently, a thorough Graduate College business process review was requested with the goal of completing during the summer months.

## **Portfolio Health:**

The majority of the projects in this Portfolio are “on schedule” or wrapping up shortly. The OnBase Enhancement project is “on hold” until after the OnBase Upgrade project completes, giving the Graduate College additional functionality. The only “not started” project is automating a workaround for obtaining GPA from Slate and loading it into CSS. This project should be started when IT, Graduate College, and R&R resources have the bandwidth to begin development.

**ESC Portfolio Sponsor:** Peggy Booth

**ITS Portfolio Manager:** Adam Petrea

# Graduate Education Portfolio Composition

Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
New Program Proposal Updates For Grad College	1	Project	On Schedule	7/9/2018	1/31/2019	70%	Chris Wammes	Graduate College	Stephanie Boman
Auto push of GMAT and GRE Test Scores with PDL	3	Enhancement	On Schedule	8/9/2017	2/28/2019	50%	Richard Kasch	Graduate College	Angela McCutcheon
Slate Document Import Into OnBase	2	Project	On Schedule	9/4/2018	4/1/2019	15%	Andy Lynch	Graduate College	Angela McCutcheon
Business Process Review for Graduate College	2	Project	On Schedule	1/14/2019	5/31/2019	5%	Adam Petrea	Graduate College	Stephanie Boman
Onbase Enhancements for Graduate College	1	Project	On Hold	8/13/2018	8/22/2019	40%	Bridget Place	Graduate College	Alexander Goberman
Feed UG GPA from Slate into CSS	2	Project	Not Started	10/25/2018	3/29/2019	0%	Sheri Thomas	Graduate College	Angela McCutcheon

# Human Resources Portfolio Overview

## **Portfolio Overview:**

The Human Resources Portfolio is comprised of Office of Human Resources, and Student Employment Services projects to enhance existing processes.

## **Portfolio Health:**

The majority of the projects in this Portfolio are “On Hold” or “Not Scheduled” as they are items identified as a result of the Human Resources business process review. These projects will be started as requirements & resources are identified and made available.

The PeopleSoft HCM Get Current & Data Masking Functionality in HCM projects are just getting started with a implementation in May 2019.

The PeopleSoft Personnel Action Forms Development project is just getting started as we are gathering requirements.

**ESC Portfolio Sponsor:** Viva McCarver

**ITS Portfolio Manager:** Todd Glick

# Human Resources Portfolio Composition



Name	ESC Priority	Project Subtype	Status Name	Start	End	Percent Complete	Manager	Acct/Dept	Sponsor
PeopleSoft HCM Get Current - 2019	ASAP	Project	On Schedule	1/2/2019	5/12/2019	10%	Tim Parish	Human Resources	Beth Rife
BPR (HCM) - HCM Fluid Implementation	2	Project	On Schedule	1/1/2019	6/1/2019	35%	Mike Hachtel	Human Resources	Beth Rife
PeopleSoft Personnel Action Forms Development		Project	On Schedule	7/1/2018	6/30/2019	5%	Adam Petrea	Human Resources	Beth Rife
ExceltoCI for the component COURSE_ENROLLMENT1		Enhancement	On Hold	6/1/2018	10/1/2018	40%	Todd Glick	Human Resources	Beth Rife
ExceltoCI for Contract Pay Page in HCM		Enhancement	On Hold	8/21/2017	12/31/2018	5%	Todd Glick	Human Resources	Beth Rife
BPR (HCM) - Full House: Business Automation - PAF	1	Project	On Hold	1/1/2019	6/1/2019	0%	Mike Hachtel	Human Resources	
BPR (HCM) - Affirmative Action/Data Standardization	1	Project	On Hold	10/24/2018	12/31/2019	67%	Todd Glick	Human Resources	Beth Rife
Data Masking Functionality in HCM	1	Project	Not Started	6/1/2018	12/31/2018	0%	Tim Parish	Human Resources	Beth Rife
BPR - Contract Addendum Automation (OB to PS)		Project	Not Started	7/1/2018	6/30/2019	0%	Sheri Thomas	Human Resources	Beth Rife
BPR - Supplemental Pay Automation		Project	Not Started	7/1/2018	6/30/2019	0%	Sheri Thomas	Human Resources	Beth Rife



# Info Tech Srvs Portfolio Overview

## **Portfolio Overview:**

The Information Technology Services (ITS) Portfolio is largely comprised of projects and enhancements that focus on the maintenance of applications, infrastructure and client services needs. The goal of ITS is to ensure that all applications and infrastructure components are maintained at a supported version. Additionally to ensure that BGSU is utilizing the licenses of all technology resources appropriately.

## **Portfolio Health:**

The majority of the projects in this Portfolio are “on schedule”. A few of the projects have just kicked off. The top priority project of the ITS portfolio is to complete the migration from the Hayes Data Center to the Buckeye Tel Data Center.

**ESC Portfolio Sponsor:** Sheri Stoll / John Ellinger

**ITS Portfolio Manager:** Sheri Thomas

# Info Tech Srvs Portfolio Composition

Name	ESC Priority	Project Type	Status	Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Process Review - Graduation Application in CSS	3	Project	On Schedule		7/9/2018	12/6/2018	95%	Andy Lynch	Information Technology Service	Adam Petrea
DCM - Application Migrations	1	Project	On Schedule		12/4/2015	12/31/2018	76%	Margo Kammeyer	Information Technology Service	Matthew Haschak
Liferay Upgrade	2	Project	On Schedule		4/9/2018	2/8/2019	90%	Margo Kammeyer	Information Technology Service	Chris Wammes
DocuSign - Personal check-in form		Enhancement	On Schedule		11/14/2018	2/28/2019	50%	Jeremy Luring	Information Technology Service	Justin Hise
Pharos Decommissioning	3	Project	On Schedule		1/15/2019	5/13/2019	65%	Donald Schumacher	Information Technology Service	Joel Arakaki
Analytics & BI Reporting Tool RFP	2	RFP	On Schedule		12/17/2018	5/31/2019	5%	Mike Hachtel	Information Technology Service	Mike Hachtel
OnBase 18 Upgrade	2	Project	On Schedule		11/30/2018	5/31/2019	15%	Margo Kammeyer	Information Technology Service	Chris Wammes
PeopleSoft Testing Framework	3	Project	On Schedule		1/16/2019	6/30/2019	5%	Mike Hachtel	Information Technology Service	Mike Hachtel
FMS Replaces Pinnacle Telephone Billing	1	Project	On Schedule		11/12/2018	7/1/2019	5%	Sue Tomor	Information Technology Service	Jared Baber
Bridge Implementation - Enterprise Training System	1	Project	On Schedule		12/17/2018	7/1/2019	25%	Adam Petrea	Information Technology Service	Mike Hachtel
IT Changes for Mercy College		Project	On Schedule		9/17/2018	7/31/2019	10%	Sheri Thomas	Information Technology Service	John Ellinger
Oracle Database Upgrade to 18c	3	Project	On Schedule		1/16/2019	8/1/2019	10%	Bridget Place	Information Technology Service	Norman Carney
Duo for Email Implementation	2	Project	On Schedule		10/25/2018	9/1/2019	25%	Adam Petrea	Information Technology Service	Joel Arakaki

# Info Tech Srvs Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Windows 7 to Windows 10 Upgrades	2	Project	On Schedule	9/20/2018	1/14/2020	25%	Andy Lynch	Information Technology Service	Joel Arakaki
Improve Web Accessibility		Enhancement	On Schedule	9/1/2017	12/31/2020	0%	Chris Wammes	Information Technology Service	Chris Wammes
Enterprise Reporting - Phase IV:HR	1	Project	On Hold	5/14/2015	12/31/2019	10%	Theresa Sherwood	Information Technology Service	Theresa Sherwood
Peoplesoft/Fax Server Integration		Enhancement	Not Started	5/14/2018	8/1/2018	0%	Mike Hachtel	Information Technology Service	Jared Baber
Falcon Club Implementation	1	Project	Not Started	4/30/2018	12/31/2018	0%	Tim Parish	Information Technology Service	John Ellinger
Adobe Creative Cloud Licensing Implementation	3	Project	Not Started	1/4/2019	5/1/2019	0%	Adam Petrea	Information Technology Service	Joel Arakaki
Remove hyperlinks from all HCM workflow notifications		Enhancement	Behind Schedule	12/8/2017	4/1/2019	52%	Todd Glick	Information Technology Service	David Hayes
Create PeopleSoft Archive Process for T&L Audit Table		Enhancement	Behind Schedule	1/19/2019	5/13/2019	50%	Todd Glick	Information Technology Service	Phyllis Short



# Marketing & Comm Portfolio Overview

## **Portfolio Overview:**

The Marketing & Communications Portfolio is largely comprised of Adobe Experience Manager and Adobe Campaign projects to enhance existing processes.

## **Portfolio Health:**

The Web Optimization and Dynamic Reporting projects are just getting kicked off and looked healthy at this point. The Adobe Campaign project has had some setbacks, but we have to adjust some of the testing schedule to still meet the deadline for production migration.

**ESC Portfolio Sponsor:** Dave Kielmeyer

**ITS Portfolio Manager:** Chris Wammes



# Marketing & Comm Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Web Optimization in AEM	2	Project	On Schedule	1/28/19	4/9/19	15%	Chris Wammes	Marketing & Communications	Beth Detwiler
Alumni Move into Adobe Campaign	1	Project	On Schedule	7/31/18	5/3/19	45%	Margo Kammeyer	Marketing & Communications	Beth Detwiler
Adobe Campaign Standard: Dynamic Reporting does not have any segments available		Enhancement	Not Started	2/18/19	4/26/19	0%	Chris Wammes	Marketing & Communications	Robb Nardecchia



# Office of the Provost Portfolio Overview

## **Portfolio Overview:**

The Office of the Provost Portfolio is largely comprised of Office of the President, Office of the Provost, and Academic Affairs projects to enhance existing processes.

## **Portfolio Health:**

The majority of the projects in this Portfolio are “on schedule” or wrapping up shortly. EAB is on schedule for delivery in March. Academic Partnerships is pending a signed contract. The Provost Performance Metrics are almost complete with two metrics in progress and one on hold pending future decisions on which metrics to include.

**ESC Portfolio Sponsor:** Joe Whitehead

**ITS Portfolio Manager:** Theresa Sherwood

# Office of the Provost Portfolio Composition

Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Update SPSS Interviewer		Enhancement	On Schedule	5/21/2018	12/31/2018	100%	Chris Wammes	Human Services Department	Philip Stinson
electronic lab manual for biology 2040 introductory labs		Enhancement	On Schedule	7/1/2018	1/4/2019	50%	Scott Blackwood	Biological Science	Paul Moore
OnBase Workview Database for the English Department	2	Project	On Schedule	9/6/2018	2/7/2019	95%	Andy Lynch	English Department	Kimberly Spallinger
Writing Placement Email for CCP Students	2	Project	On Schedule	6/11/2018	3/3/2019	70%	Sue Tomor	English Department	Lee Nickoson
Implementation of GoReact Software	1	Project	On Schedule	1/9/2019	3/22/2019	40%	Donald Schumacher	School of Ed Found, Lead & Pol	Matthew Lavery
Job Posting Web App Phase 2	2	Project	On Schedule	8/13/2018	3/28/2019	50%	Chris Wammes	Student Employment	Dawn Chong
New Falcon Info Report - Combine Winter and Summer		Enhancement	On Schedule	1/9/2019	3/31/2019	50%	Carla Rinearson	On-Line & Summer Acad Progs	Betsy Winters
Speech and Hearing Video System RFQ		RFP	On Schedule	11/12/2018	4/1/2019	75%	John Ellinger	Col of Health & Human Services	John Ellinger
New Report for Accounting by Ethnicity		Enhancement	On Schedule	8/29/2018	4/30/2019	30%	Gregory Brown	Accounting/MIS	Fred Coleman
Upgrade WebCheckout from version 4.4.1 to 4.7		Project	On Schedule	12/5/2018	5/17/2019	15%	Andy Lynch	School of Media and Comm	Andrew Charter
Academic Partnerships Implementation	ASAP	Project	On Schedule	6/25/2018	6/1/2019	15%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts
Student Employment Services tool to track interactions		Enhancement	On Schedule	12/6/2018	6/30/2019	50%	Andy Lynch	Student Employment	Dawn Chong
PPM 8 - Learning Communities	1	Project	On Schedule	7/30/2018	6/30/2019	25%	Theresa Sherwood	Office of the Provost	John Fischer

# Office of the Provost Portfolio Composition

Name	ESC Priority	Project Type	Status	Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
EAB APS Implementation	ASAP	Project	On Schedule		7/25/2018	6/30/2019	50%	Sue Tomor	Office of the Provost	John Fischer
Add FIG group data to data warehouse reports		Enhancement	On Schedule		6/1/2018	6/30/2019	50%	Gregory Brown	Career Center	Cynthia Snodgrass
Program Assessment Software Development	2	Project	On Schedule		8/1/2018	6/30/2019	10%	Sheri Thomas	College of Education - Admin	Brian Campbell
Add Honors College to Falcon Info Report		Enhancement	On Schedule		11/7/2018	6/30/2019	25%	Theresa Sherwood	Honors College	Monica Hartzler
Provost Performance Metrics Portfolio	1	Project	On Schedule		6/30/2018	6/30/2019	50%	Theresa Sherwood	Office of the Provost	John Fischer
PPM 9 - Contribution Margin Ratio	1	Project	On Schedule		8/1/2018	6/30/2019	30%	Theresa Sherwood	Finance & Administration	Sherideen Stoll
Decommission WorkNet		Project	On Schedule		12/13/2018	6/30/2019	13%	Todd Glick	Career Center	Danielle Dimoff
Europe's New General Data Privacy Regulation (GDPR) for Handshake	3	Enhancement	On Hold		5/22/2018	11/20/2018	5%	Andy Lynch	Career Center	Danielle Dimoff
Export Notes from HandShake into EAB SSC	2	Project	On Hold		8/25/2018	6/3/2019	20%	Richard Kasch	Career Center	Danielle Dimoff
PPM 12 - 60 Credits Hours	1	Project	On Hold		7/30/2018	6/30/2019	80%	Theresa Sherwood	Office of the Provost	John Fischer
Avalon Upgrade to Current Release	2	Project	Not Started		6/30/2018	9/30/2018	0%	Sheri Thomas	University Libraries	Michelle Chronister
Add additional instructor information to the Data Warehouse on Class Section Term		Enhancement	Not Started		7/22/2018	4/14/2019	0%	Theresa Sherwood	A&S Dean	Dale Klopfer
DW - Add Faculty Job Function to Academics Subject Area		Enhancement	Not Started		8/22/2018	4/14/2019	0%	Theresa Sherwood	A&S Dean	Dale Klopfer

# Office of the Provost Portfolio Composition

Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
My Library Account functionality in Mobile App	2	Project	Not Started	1/2/2019	8/1/2019	0%	Sheri Thomas	University Libraries	Mark Strang
Implementation of Mursion software and hardware	1	Project	Not Started	1/9/2019	8/23/2019	0%	Andy Lynch	College of Education - Admin	Matthew Lavery
Co-Op/Internship Management Tool	1	Project	Not Started	11/1/2018	8/23/2019	0%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts
Renderfarm for School of Art	2	Project	Not Started	3/25/2019	8/23/2019	0%	Bridget Place	School of Art	Jason Walton
Improve OnBase contract preparation (College end)	2	Project	Not Started	1/7/2019	9/2/2019	0%	Sheri Thomas	A&S Dean	Connie Allison

# Public Safety Portfolio Overview

## **Portfolio Overview:**

The Public Safety Portfolio is largely comprised of Parking, Police, Public Safety, and Emergency Response projects to enhance existing processes.

## **Portfolio Health:**

All projects and enhancements in this Portfolio are in progress. Along with these projects, we are also working with the Parking Services vendor to build a roadmap of future enhancements opportunities.

**ESC Portfolio Sponsor:** Sheri Stoll (Mike Campbell)

**ITS Portfolio Manager:** Mike Hachtel

# Public Safety Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Implementation of 911Cellular - Phase 1	2	Project	On Schedule	8/23/2018	1/6/2019	75%	Tim Parish	Public Safety	John Ellinger
Change T2 violation types		Enhancement	On Schedule	1/21/2019	2/7/2019	25%	Robert Fyfe	Parking Services	Robert Mason
Parking - Online Visitor Parking Permits	2	Project	On Schedule	5/15/2017	8/1/2019	25%	Andy Lynch	Parking Services	Thomas Kelly



# Res & Econ Engage Portfolio Overview

## **Portfolio Overview:**

The Research and Economic Engagement Portfolio is largely comprised of SPAR, Collab Lab, and COSMOS projects to enhance existing processes.

## **Portfolio Health:**

There are currently no requests for project or enhancement work in this portfolio.

**ESC Portfolio Sponsor:** Mike Ogawa

**ITS Portfolio Manager:** Mike Hachtel

Green



# Res & Econ Engage Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
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# StudAffairs/Athletics Portfolio Overview

## **Portfolio Overview:**

The Student Affairs and the Athletics Portfolios are comprised of Student Affairs, Office of Residence Life, Dean of Students Office, First Year Experience, Rec Center and Athletics projects to enhance existing processes.

## **Portfolio Health:**

The projects in this Portfolio are proceeding “on schedule”. The implementation of Presence project is scheduled to complete in March. The implementation of Paciolan ticketing system has officially kicked off and includes adding a Falcon Club and client relations component

**ESC Portfolio Sponsor:** Tom Gibson / Bob Moosbrugger

**ITS Portfolio Manager:** Mike Hachtel

# StudAffairs/Athletics Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Implementation of Presence	1	Project	On Schedule	7/9/2018	3/29/2019	50%	Tim Parish	Office of the Dean of Students	Brian Heilmeier
Paciolan Ticket System Implementation	1	Project	On Schedule	11/13/2018	4/15/2019	5%	Tim Parish	Intercollegiate Athletics	James Elsasser
Falcon Club Young Alumni Gift Club		Enhancement	On Hold	2/1/2019	4/30/2019	0%	Donald Schumacher	Intercollegiate Athletics	Daniel Meyer



# Univ. Advancement Portfolio Overview

## **Portfolio Overview:**

The University Advancement Portfolio is largely comprised of University Advancement, Alumni, and Foundation projects to enhance existing processes.

## **Portfolio Health:**

The Agilon upgrade project is continuing to progress. There was a major issue found during testing that required the project to step back to the development phase. The team determined a solution and is progressing forward with a couple of weeks added to the completion date.

**ESC Portfolio Sponsor:** Pam Conlin

**ITS Portfolio Manager:** Mike Hachtel

# Univ. Advancement Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
AgilonONE Upgrade	2	Project	On Schedule	11/1/2018	3/7/2019	55%	Mike Hachtel	V P University Advancement	John Konecny
Better Categorization of Entities within Agilon One		Enhancement	Not Started	12/31/2018	12/31/2019	0%	Mike Hachtel	Development Office	Kyle Crawford



# Univ. Financials Portfolio Overview

## **Portfolio Overview:**

The University Financials Portfolio is largely comprised of Budgeting, Controller, Payroll, Grants Accounting, Bursar, and Payables projects to enhance existing processes.

## **Portfolio Health:**

Coming off the successful FMS Get Current project, many of the projects and enhancements in this portfolio are being picked back up from being on hold during previous months. Grants Portal was originally part off the Get Current project and has been made into a separate project to continue forward in preparation of phase 2. A number of report enhancements will be underway over the next month.

**ESC Portfolio Sponsor:** Sheri Stoll (Bob Swanson / Sharon Swartz)

**ITS Portfolio Manager:** Mike Hachtel

# Univ. Financials Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor
Grants Time and Effort Certification		Enhancement	On Schedule	8/17/2017	9/27/2018	75%	Chris Wammes	Controller's Office	Joanna Pardon
Grants Portal	1	Project	On Schedule	9/1/2018	2/5/2019	50%	Tim Parish	Controller's Office	Joanna Pardon
Secure Internal Audit Public Queries in FMS		Enhancement	On Schedule	1/9/2019	2/17/2019	70%	Scott Blackwood	Internal Auditing	Lily Young
New WRL Report-Project Listing by Area (Dept)		Enhancement	On Schedule	11/27/2018	2/21/2019	50%	Isha Muthreja	Controller's Office	Stacey Beckner
2019 U.S. Payroll Tax & Legislative Items		Project	On Schedule	2/4/2019	3/31/2019	0%	Todd Glick	Controller's Office	Rhonda Dicke
Switch out Direct Deposit Classic Pages for Fluid Pages		Enhancement	On Schedule	10/1/2018	6/2/2019	31%	Todd Glick	Bursar's Office	Rhonda Montague
Business Process Review (BPR)	1	Project	On Schedule	4/30/2017	12/31/2019	55%	Mike Hachtel	Finance & Administration	
Agilon One Receipts Phase #3		Enhancement	On Schedule	1/11/2019	12/31/2019	10%	Theresa Sherwood	Controller's Office	Stacey Beckner
Agilon: Fund Rep Table Clean Up		Enhancement	Not Started	10/29/2018	2/3/2019	0%	David Hayes	Controller's Office	Stacey Beckner
FMS - Nondisclosure Agreement	3	Project	Not Started	2/1/2019	5/2/2019	0%	Sheri Thomas	Controller's Office	Bob Swanson
Foundation Donor Reports-Phase 3		Enhancement	Not Started	1/14/2019	5/3/2019	10%	Bridget Place	Controller's Office	Stacey Beckner
Grants Portal Phase II	1	Project	Not Started	1/21/2019	6/30/2019	0%	Tim Parish	Controller's Office	Joanna Pardon
Crystal Reports and Web Report Library Upgrade	3	Project	Not Started	1/14/2019	6/30/2019	0%	Bridget Place	Controller's Office	Amy Beltano

