



# Executive Sponsors Meeting Business Area – Portfolios

08/12/2019

## 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”.

We are currently working on the second phase of the Automate Transcript Requests from ATC project.

Persistence and Retention Report: Continuing development.

Export ACCUPLACER & Placement Exam Test Score Data from CSS to UG – Currently being tested by Undergraduate Admissions.

Federal Work Study Business Process Review – The business process review has begun.

Revise Room Allotment Reports – Development has resumed.

**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	Health
Federal Work Study Business Process Review	1	Project	On Schedule	3/1/2019	7/31/2019	5%	Adam Petrea	Student Employment	Dawn Chong	On Schedule
Revise Room Allotment Reports	1	Project	On Schedule	1/1/2019	8/15/2019	20%	Adam Petrea	Registrar	Kathy Dean	On Schedule
Persistence and Retention Report		Enhancement	On Schedule	9/27/2018	8/29/2019	35%	Bridget Place	Financial Aid	Jerry Ameling	On Schedule
Add dates to CSTPY0515P-FWS BI-WEEKLY CSS recurrence		Enhancement	On Schedule	8/1/2019	9/1/2019	45%	Todd Glick	Financial Aid	Chris Martinez	On Schedule
Automate Transcript Requests from ATC	1	Project	On Schedule	4/1/2018	9/30/2019	70%	Margo Kammeyer	Registrar	Rachel Schaeffer	On Schedule
Firelands Pathway - Selection by Plan	1	Project	Not Started	6/10/2019	12/27/2019	0%	Sheri Thomas	Registrar Information	Sue Lau	Not Started
Implement FLUID in CSS - Phase II		Project	Not Started	2/1/2019	12/31/2019	0%	Margo Kammeyer	Technology Service	Sheri Thomas	Not Started
Advanced Placement Program® (AP) File Automation	1	Project	Not Started	10/1/2019	7/1/2020	0%	Margo Kammeyer	Registrar	Rachel Schaeffer	Not Started
Export ACCUPLACER & Placement Exam Test Score Data from CSS to UG		Enhancement	Behind Schedule	6/10/2019	8/1/2019	73%	Todd Glick	Admissions Office	Dustin Sabo	At Risk

On Schedule
At Risk
Behind Schedule
On Hold
Not Started

# 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:**

The Payment Works project has fallen behind schedule and will not complete in August. New projections have this project completing in late September. The Blackboard Transact upgrade is at risk because the vendor has not released a reliable version of the application that is compatible with the Oracle 18c database. Since the previous update, three enhancements have completed and two new projects have been approved.

**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	% Comp	Manager	Acct/Dept	Sponsor	Health
Implementation of Campus Cash	ASAP	Project	On Schedule	5/28/2019	8/23/2019	85%	Margo Kammeyer	BG1 Card	Ashely DiMasso	On Schedule
Transact Payment Processor Implementation	ASAP	Project	On Schedule	7/17/2019	8/31/2019	15%	Andy Lynch	BG1 Card	Ashely DiMasso	On Schedule
Payment Works Implementation	1	Project	Behind Schedule	1/7/2019	8/18/2019	75%	Andy Lynch	Business Operations	Phillip Worley	Behind Schedule
Pcard Vendor Change	1	Project	On Schedule	3/18/2019	10/1/2019	45%	Tim Parish	Business Operations	Phillip Worley	On Schedule
BBTS Application and Database Upgrade	2	Project	On Schedule	7/18/2019	10/31/2019	5%	Donald Schumacher	BG1 Card	Ashely DiMasso	At Risk
Add pdf print to dispatch PO option as the default		Enhancement	Not Started	5/9/2019	6/10/2019	0%	David Hoops	Business Operations	Kristina Rhine	Not Started



On Schedule
At Risk
Behind Schedule
On Hold
Not Started

# 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 no enhancements or projects.

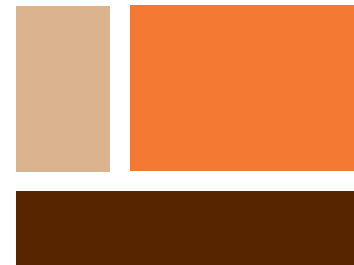
**ESC Portfolio Sponsor:** Sheri Stoll (Bruce Meyer)

**ITS Portfolio Manager:** Mike Hachtel

# Capitol Planning Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health



Green	On Schedule
Yellow	At Risk
Red	Behind Schedule
Purple	On Hold
Light Tan	Not Started



# Graduate Education Portfolio Overview

## **Portfolio Overview:**

The Graduate Education Portfolio is mostly comprised of Slate, OnBase, and graduation related projects to develop new or update existing processes. Progress has been made on many of the Graduate Education's projects, including Slate Document Import, Graduate College BPR, and Graduate Application in CSS. The Electronic Graduate Student Curriculum Exception Process project was just started and has been making positive initial progress.

## **Portfolio Health:**

There are three initiative scheduled to be completed in August, including the Graduate College BPR, Slate Document Import into OnBase, and Graduate Admissions Workflow in OnBase. The Graduation Clearance Portal project has made great progress and should be complete in September (date to be confirmed/changed shortly). Other longer term projects are on schedule, such as the Electronic Graduate Student Curriculum Exception Process and the GA Contracting BPR Process Updates.

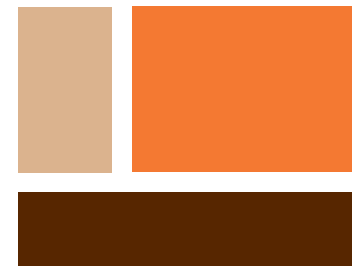
**ESC Portfolio Sponsor:** Peggy Booth

**ITS Portfolio Manager:** Adam Petrea

# Graduate Education Portfolio Overview



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Auto push of GMAT and GRE Test Scores with PDL		Enhancement	On Schedule	8/9/2017	5/31/2019	50%	Richard Kasch	Graduate College	Angela McCutcheon	
Add Graduate Admissions Workflow in OnBase		Enhancement	On Schedule	6/24/2019	7/31/2019	75%	Michelle Schenk	Graduate College	Angela McCutcheon	
Slate Document Import Into OnBase	2	Project	On Schedule	9/4/2018	8/15/2019	90%	Andy Lynch	Graduate College	Angela McCutcheon	
Onbase Enhancements for Graduate College	1	Project	On Schedule	8/13/2018	8/22/2019	55%	Bridget Place	Graduate College	Alexander Goberman	
Graduation Clearance Portal	1	Project	On Schedule	6/3/2019	8/23/2019	25%	Bridget Place	Graduate College	Alexander Goberman	
Business Process Review for Graduate College	2	Project	On Schedule	1/14/2019	8/31/2019	95%	Adam Petrea	Graduate College	Stephanie Boman	
Graduation Application within CSS Improvement project	1	Project	On Schedule	3/5/2019	10/6/2019	30%	Richard Kasch	Marketing & Communications	Beth Detwiler	
Feed UG GPA from Slate into CSS	2	Project	On Schedule	7/29/2019	12/29/2019	5%	Richard Kasch	Graduate College	Angela McCutcheon	
Electronic Graduate Student Curriculum Exception Process	1	Project	On Schedule	7/15/2019	12/31/2019	5%	Margo Kammeyer	Graduate College	Alexander Goberman	
GA Contracting BPR Process Updates	2	Project	On Schedule	2/18/2019	1/1/2020	35%	Margo Kammeyer	Graduate College	Michele Schmitz	



	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# Human Resources Portfolio Overview

## **Portfolio Overview:**

The Human Resources Portfolio is comprised of Office of Human Resources 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.

Common Remitter Interface Implementation – Development will begin in August.

Enterprise Reporting - Phase IV:HR - Developing both the employee headcount and the leave usage reporting.

HCM Ranks Negotiated in 2019 CBA – Reviewing impacts to PeopleSoft HCM application and to the downstream applications receiving faculty tenure and rank information.

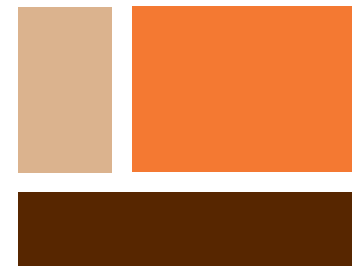
**ESC Portfolio Sponsor:** Viva McCarver

**ITS Portfolio Manager:** Todd Glick

# Human Resources Portfolio Composition



Name	ESC Priority	Project Subtype	Status Name	Start	End	Percent Complete	Manager	Acct/Dept	Sponsor	Health
HCM Ranks Negotiated in 2019 CBA	1	Project	On Schedule	6/10/2019	9/1/2019	15%	Adam Petrea	Human Resources	Beth Rife	On Schedule
Enterprise Reporting - Phase IV:HR	1	Project	On Schedule	5/14/2015	12/31/2019	20%	Theresa Sherwood	Human Resources	Viva McCarver	On Schedule
Common Remitter Interface Implementation	ASAP	Project	On Schedule	3/26/2019	1/1/2020	15%	Tim Parish	Human Resources	Beth Rife	On Schedule
ExceltoCl for Contract Pay Page in HCM		Enhancement	On Hold	8/21/2017	12/31/2018	5%	Todd Glick	Human Resources	Beth Rife	On Hold
PeopleSoft Personnel Action Forms Development	2	Project	On Hold	7/1/2018	6/30/2019	5%	Adam Petrea	Human Resources	Beth Rife	On Hold
BPR (HCM) - Affirmative Action/Data Standardization	1	Project	On Hold	10/24/2018	12/31/2019	67%	Todd Glick	Human Resources	Beth Rife	On Hold
BPR - Adjunct Automation (OB to PS) and Grants Updates	2	Project	Not Started	7/1/2018	6/30/2019	0%	Sheri Thomas	Human Resources	Beth Rife	Not Started
BPR - Supplemental Pay Automation	2	Project	Not Started	7/1/2018	6/30/2019	0%	Sheri Thomas	Human Resources	Beth Rife	Not Started



Green	On Schedule
Yellow	At Risk
Red	Behind Schedule
Purple	On Hold
Light Brown	Not Started

# 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:**

All of the projects in this Portfolio are “on schedule” and started. The primary focus of this portfolio is maintenance/upgrades of primary applications in all areas: Infrastructure, Client Services and Application Dev/Sup. The current focus is the completion of the migration to ZDAM, the decommissioning of the Pinnacle Billing Application and the implementation of the Microsoft of the Advanced Protection Threat Implementation. Additionally, the PS team is working on the PUM 14 and the Fluid Implementation.

**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	% Comp	Manager	Acct/Dept	Sponsor	Health
Life ray Maintenance		Enhancement no Analyst	On Schedule	5/29/2019	8/16/2019	26%	Chris Wammes	Information Technology Service	Chris Wammes	
Peoplesoft/Fax Server Integration		Enhancement no Analyst	On Schedule	5/14/2018	8/18/2019	0%	Mike Hachtel	Information Technology Service	Jared Baber	
Move Data Warehouse ETL Jobs to Data Center	2	Project	On Schedule	6/24/2019	9/30/2019	60%	Theresa Sherwood	Information Technology Service	Theresa Sherwood	
Update web application vulnerabilities		Enhancement no Analyst	On Schedule	7/10/2019	9/30/2019	5%	Chris Wammes	Information Technology Service	Chris Wammes	
CSS 9.2 PUM 14 and Financial Aid Regulatory Release - Fall 2019	2	Project	On Schedule	8/15/2019	10/1/2019	35%	Sue Tomor	Financial Aid		
Oracle Database Upgrade to 18c	3	Project	On Schedule	1/16/2019	10/1/2019	80%	Bridget Place	Information Technology Service	Norman Carney	
PeopleSoft Testing Framework	3	Project	On Schedule	1/16/2019	10/4/2019	70%	Mike Hachtel	Information Technology Service	Mike Hachtel	
Firewall Implementation	2	Project	On Schedule	3/18/2019	11/10/2019	80%	Michelle Schenk	Information Technology Service	Erik Evans	
Update PaperCut server to latest build	2	Project	On Schedule	6/5/2019	12/31/2019	5%	Tim Parish	Information Technology Service	P.J. Enright	
Move OBIEE to Data Center	2	Project	On Schedule	6/24/2019	12/31/2019	25%	Gregory Brown	Information Technology Service	Theresa Sherwood	
Migrate to ZDam Digital Asset Management System	2	Project	On Schedule	1/25/2019	12/31/2019	25%	Michelle Schenk	Information Technology Service	Chris Wammes	
FMS Replaces Pinnacle Telephone Billing	1	Project	On Schedule	11/12/2018	12/31/2019	40%	Sheri Thomas	Information Technology Service	Jared Baber	
Power BI Implementation	2	Project	On Schedule	9/1/2019	12/31/2019	10%	Margo Kammeyer	Information Technology Service	Mike Hachtel	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# Info Tech Srvs Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Windows 7 to Windows 10 Upgrades	2	Project	On Schedule	9/20/2018	1/14/2020	40%	Andy Lynch	Information Technology Service	Joel Arakaki	On Schedule
Fluid Implementation (Phase I)	2	Project	On Schedule	1/1/2019	2/10/2020	10%	Margo Kammeyer	Information Technology Service	John Ellinger	On Schedule
Implement Microsoft Advanced Threat Protection	1	Project	On Schedule	8/7/2019	3/16/2020	5%	Michelle Schenk	Information Technology Service	Matthew Haschak	On Schedule
Convert PeopleSoft Queries to WRL Reports	2	Project	On Schedule	6/5/2019	6/30/2020	5%	Theresa Sherwood	Information Technology Service	Sheri Thomas	On Schedule
Improve Web Accessibility		Enhancement no Analyst	On Schedule	9/1/2017	12/31/2020	0%	Chris Wammes	Information Technology Service	Chris Wammes	On Schedule
Update GVE to minor version 2.8.1		Enhancement no Analyst	Not Started	9/9/2019	10/4/2019	0%	Matt Grulke	Information Technology Service	Patrick Lisk	Not Started
Create a ticket via TDX API service for Desktop Refresh requests		Enhancement with Analyst	Not Started	9/4/2019	10/11/2019	0%	Michelle Schenk	Information Technology Service	Joel Arakaki	Not Started



On Schedule
At Risk
Behind Schedule
On Hold
Not Started

# 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:**

In the last month we closed a large project for Adobe Campaign for Alumni. This month we should be completing an AEM enhancement. We also anticipate starting two additional enhancements and beginning the Google Tag Manager integration.

**ESC Portfolio Sponsor:** Dave Kielmeyer

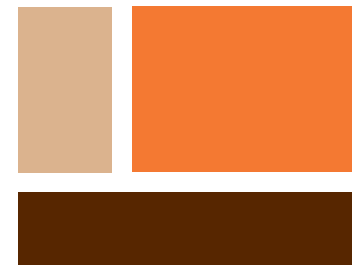
**ITS Portfolio Manager:** Chris Wammes



# Marketing & Comm Portfolio Composition



Name\	ESC Priority	Project Type	Status Name	Start	End	% Complete	Manager	Acct/Dept	Sponsor	Health
AEM Development: Utilize Social rendition for the social image on page		Enhancement	On Schedule	5/28/19	7/31/19	0%	Chris Wammes	Marketing & Communications	Robb Nardecchia	
Google Tag Manager Implementation	2	Project	On Schedule	3/5/19	8/31/19	10%	Chris Wammes	Marketing & Communications	Robb Nardecchia	
AEM Template Console and Template Authors		Enhancement	Not Started	6/17/19	7/18/19	0%	Clinton LaForest	Marketing & Communications	Robb Nardecchia	
AEM Request: Adaptive Image within Callout Box		Enhancement	Not Started	5/28/19	7/31/19	0%	Chris Wammes	Marketing & Communications	Robb Nardecchia	
Class Search Direct Links/Parameters	1	Project	Not Started	6/10/19	8/1/19	0%	Sheri Thomas	Marketing & Communications	Robb Nardecchia	
AEM Component Update: Call Out Box		Enhancement	Not Started	7/22/19	12/31/19	0%	Chris Wammes	Marketing & Communications	Robb Nardecchia	



	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# 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 EAB APS Implementation and Upgrade WebCheckout from version 4.4.1 to 4.7 projects were completed in July. Testing continues for the My Library Account functionality in Mobile App. Training is almost complete for the Implementation of Mursion software and hardware. Analysis of current college processes is almost complete for the Co-Op/Internship Management Tool. BGSU and Academic Partnerships have determined what specific data will be shared for the Academic Partnerships Implementation, and a technical spec for the first file, due by October 1st, is complete. Renderfarm for School of Art is on hold due to other start of semester priorities.

**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	%	Manager	Acct/Dept	Sponsor	Health
Load All Foreign Language Placement Test from Perpetual Works		Enhancement	On Schedule		2/14/2019	3/31/2019	15%	Sue Tomor	World Languages and Cultures	Philip Peek	
Smartsheets Implementation		Enhancement	On Schedule		3/25/2019	7/31/2019	10%	Adam Petrea	Office of the Provost	Davina Millin	
My Library Account functionality in Mobile App	2	Project	On Schedule		1/2/2019	8/16/2019	85%	Chris Wammes	University Libraries	Mark Strang	
Ticketing Application Conversion - Choice Ticketing to HomeTown		Enhancement	On Schedule		5/10/2019	8/16/2019	40%	Michelle Schenk	Musical Arts Dean	Lindsay Gross	
Implementation of Mursion software and hardware	1	Project	On Schedule		1/9/2019	8/23/2019	80%	Andy Lynch	College of Education - Admin	Matthew Lavery	
Student Employment Services tool to track interactions		Enhancement	On Schedule		12/6/2018	8/30/2019	90%	Andy Lynch	Student Employment	Dawn Chong	
5 year headcount enrollment of VCT		Enhancement	On Schedule		5/8/2019	9/19/2019	50%	Gregory Brown	Col of Technology Adm	Sudershan Jetley	
Add FIG group data to data warehouse reports		Enhancement	On Schedule		6/1/2018	9/26/2019	50%	Gregory Brown	Career Center	Cynthia Snodgrass	
Data Warehouse - New eCampus Dashboard		Enhancement	On Schedule		7/24/2019	10/31/2019	0%	Gregory Brown	On-Line & Summer Acad Progs	Paul Cesarini	
Advertisement Billing Data Load into FMS		Enhancement	On Schedule		7/9/2019	11/1/2019	20%	Donald Schumacher	School of Media and Comm	Robert Bortel	
GSW Group Placement error		Enhancement	On Schedule		5/15/2019	12/1/2019	30%	Michelle Schenk	English Department	Kelly Jennings	
Co-Op/Internship Management Tool	1	Project	On Schedule		2/21/2019	3/1/2020	20%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts	
Academic Partnerships Implementation	ASAP	Project	On Schedule		6/25/2018	4/1/2020	20%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# Office of the Provost Portfolio Composition

Name	ESC Priority	Project Type	Status	Name	Start	End	%	Manager	Acct/Dept	Sponsor	Health
Europe's New General Data Privacy Regulation (GDPR) for Handshake		Enhancement	On Hold		5/22/2018	11/20/2018	5%	Andy Lynch	Career Center	Danielle Dimoff	
Renderfarm for School of Art	2	Project	On Hold		3/25/2019	8/23/2019	65%	Adam Petrea	School of Art	Jason Walton	
Create new Webcheckout center - Comm. Sciences & Disorders		Enhancement	On Hold		7/1/2019	9/20/2019	5%	Andy Lynch	Comm. Sciences & Disorders	Robin Monarch	
Avalon Upgrade to Current Release	2	Project	Not Started		6/30/2018	9/30/2018	0%	Sheri Thomas	University Libraries	Michelle Chronister	
Improve OnBase contract preparation (College end)	2	Project	Not Started		1/7/2019	9/2/2019	0%	Sheri Thomas	A&S Dean	Connie Allison	
Add additional instructor info to the Data Warehouse on Class Section Term		Enhancement	Not Started		7/22/2018	12/31/2019	0%	Theresa Sherwood	A&S Dean	Dale Klopfer	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# 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:**

Since the previous update, one enhancement has been completed. Three of the current enhancements are progressing. The roadmap has been updated to reflect priorities within Parking Services.

**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	% Comp	Manager	Acct/Dept	Sponsor	Health
WebCheckout Center for Police Division		Enhancement	On Schedule	4/29/2019	8/15/2019	15%	Robert Fyfe	Police Division	Matthew Keefe	
Parking Permit Reminder Automation		Enhancement	On Schedule	6/24/2019	8/15/2019	25%	Robert Fyfe	Parking Services	Thomas Kelly	
ALICE training in Bridge		Enhancement	On Schedule	5/1/2019	8/30/2019	5%	Scott Blackwood	Police Division	Michael Campbell	
Manage Parking Services Content Wording		Enhancement	Not Started	6/24/2019	8/15/2019	0%	Robert Fyfe	Parking Services	Thomas Kelly	



	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# Public Safety Portfolio Roadmap



2018

2019

2020

2021

Parking: Permit  
Sales at SOAR

Parking: Automated  
communication

Parking: Mobile  
functionality

Parking: Improved  
permit tracking



# Res & Econ Engage Portfolio Overview

## **Portfolio Overview:**

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

## **Portfolio Health:**

One enhancement has completed and two new projects have been added since the previous update. Neither has officially started. ITS and OSPR continue to work with the vendor and will also be conducting a Business Process Review to determine potential improvements.

**ESC Portfolio Sponsor:** Mike Ogawa

**ITS Portfolio Manager:** Mike Hachtel



# Res & Econ Engage Portfolio Composition

Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
OSPAR Business Process Review	2	Project	Not Started	7/15/2019	2/28/2020	0%	Sheri Thomas	Sponsored Programs & Research	Thomas Kornacki	
Community Engagement Application Implementation	3	Project	Not Started	7/12/2019	8/31/2019	0%	Sheri Thomas	Community and Civic Engagement	V Jane Rosser	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# Student Affairs Portfolio Overview

## **Portfolio Overview:**

The Student Affairs Portfolio is comprised of Student Affairs, Office of Residence Life, Dean of Students Office, First Year Experience, and Rec Center projects to enhance existing processes.

## **Portfolio Health:**

The projects in this Portfolio are proceeding on schedule. Since the previous update, no projects have completed and nothing new has been added. Changes to the Student Health Insurance are in production and being used with no issues. The project will officially close in the next couple of weeks.

**ESC Portfolio Sponsor:** Tom Gibson

**ITS Portfolio Manager:** Mike Hachtel

# Student Affairs Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Student Health Insurance Switch to United Health Care	ASAP	Project	On Schedule	5/28/2019	8/4/2019	95%	Tim Parish	Health Services	Marlene Reynolds	On Schedule
SOAR Registration System Replacement – Slate	ASAP	Project	On Schedule	6/3/2019	12/31/2019	35%	Tim Parish	New Student Orientation	Megan Arnold	On Schedule
Evaluate Timeclock Use on Campus	2	Project	Not Started	7/7/2019	12/31/2019	0%	Andy Lynch	Information Technology Service	Joel Arakaki	Not Started
Update Student Organization Finance Report for fiscal year 2020		Enhancement	Not Started	7/1/2019	8/29/2019	0%	Carla Rinearson	Campus Activities	Jaye Baum-Gangwer	Not Started



On Schedule
At Risk
Behind Schedule
On Hold
Not Started

# Athletics Portfolio Overview

## **Portfolio Overview:**

The Athletics Portfolio is comprised of Intercollegiate Athletics projects to enhance existing processes.

## **Portfolio Health:**

The projects in this Portfolio are proceeding on schedule. The Paciolan implementation project has been broken into several projects to coincide with the vendors future release of product enhancements. Implementation of the ticketing portion of Paciolan has been completed since the previous update. No new projects or enhancements have been requested.

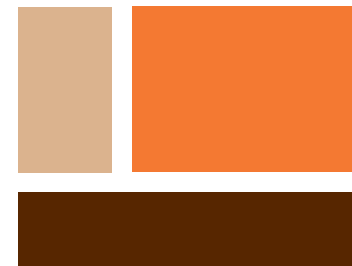
**ESC Portfolio Sponsor:** Bob Moosbrugger

**ITS Portfolio Manager:** Mike Hachtel

# Athletics Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Falcon Club Implementation	1	Project	Not Started	4/30/2018	12/31/2018	0%	Tim Parish	Information Technology Service	John Ellinger	
Paciolan Interface Project	1	Project	Not Started	4/16/2019	11/1/2019	0%	Tim Parish	Intercollegiate Athletics	James Elsasser	
TeamWorks Automation for Athletics	2	Project	On Schedule	7/1/2019	12/1/2019	25%	Andy Lynch	Intercollegiate Athletics	Chet Hesson	



	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# 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:**

ITS is assisting University Advancement with a review of the current Agilon ONE system and potential replacements. The Falcon Club enhancement will remain on hold pending the development of automated interfaces by Paciolan. Six new enhancements have been added to this portfolio, four of which have started and are progressing.

**ESC Portfolio Sponsor:** Pam Conlin

**ITS Portfolio Manager:** Mike Hachtel

# Univ. Advancement Portfolio Composition

Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Agilon One User Audit		Enhancement	On Schedule	7/29/2019	8/30/2019	5%	Donald Schumacher	V P University Advancement	John Konecny	
Conditional Pledges		Enhancement	On Schedule	7/22/2019	8/29/2019	20%	Donald Schumacher	Controller's Office	John Konecny	
UA Web Analytics		Enhancement	On Schedule	7/22/2019	8/30/2019	5%	Chris Wammes	V P University Advancement	John Konecny	
Online Giving Pages (CCON) Modifications		Enhancement	On Schedule	7/22/2019	8/30/2019	5%	Chris Wammes	V P University Advancement	John Konecny	
Falcon Club Young Alumni Gift Club		Enhancement	On Hold	2/1/2019	4/30/2019	0%	Donald Schumacher	Intercollegiate Athletics	Daniel Meyer	
Agilon CR report audit/decommission		Enhancement	Not Started	7/22/2019	9/5/2019	0%	Donald Schumacher	V P University Advancement	John Konecny	
Agilon Reports Audit		Enhancement	Not Started	9/2/2019	10/31/2019	0%	Donald Schumacher	V P University Advancement	John Konecny	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Started

# 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:**

The projects in this Portfolio are proceeding on schedule. Since the previous update, one enhancement has completed and three new projects have been approved. The Personnel Action Form is a collaboration project with Human Resources (showing on both portfolios) and will remain on hold until both departments are available to work on it together. The Grants Portal phase II project is making great progress and will add improved functionality to the Grants Accounting process.

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

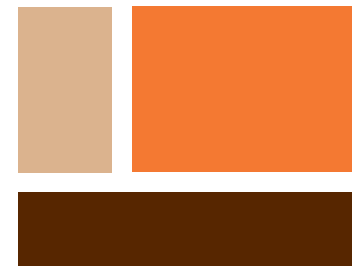
**ITS Portfolio Manager:** Mike Hachtel



# Univ. Financials Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Academic Benchmarking Consortium Implementation	ASAP	Project	On Schedule	3/18/2019	3/31/2020	30%	Sue Tomor	Information Technology Service	John Ellinger	On Schedule
Create File Layout for Attorney General's Office	ASAP	Project	Not Started	7/11/2019	11/3/2019	0%	Sue Tomor	Bursar's Office	Rhonda Montague	Not Started
Grants Portal Phase II	1	Project	On Schedule	5/13/2019	10/6/2019	55%	Tim Parish	Controller's Office	Joanna Pardon	On Schedule
Academics Financials Reporting	1	Project	On Schedule	8/1/2018	12/31/2019	60%	Theresa Sherwood	Finance & Administration	Sherideen Stoll	On Schedule
Create WRL Reports from Agresso Data/Decommission Agresso System	2	Project	Not Started	4/1/2019	1/1/2020	0%	Tim Parish	Controller's Office	Stacey Beckner	Not Started
FMS Get Current 2019	2	Project	Not Started	10/1/2019	2/16/2020	0%	Tim Parish	Controller's Office	Bob Swanson	Not Started
PeopleSoft Personnel Action Forms Development	2	Project	On Hold	7/1/2018	6/30/2019	5%	Adam Petrea	Human Resources	Beth Rife	On Hold
Additional functionality needed in BGPC003 process	2	Project	Not Started	2/14/2019	5/13/2019	0%	Sheri Thomas	Bursar's Office	Leann Peiffer	Not Started
FMS Non Disclosure Agreement	3	Project	On Schedule	7/22/2019	12/31/2019	5%	Margo Kammeyer	Controller's Office	Bob Swanson	On Schedule
Grants Time and Effort Certification		Enhancement	On Schedule	8/17/2017	9/27/2018	85%	Chris Wammes	Controller's Office	Joanna Pardon	On Schedule



On Schedule	On Schedule
At Risk	At Risk
Behind Schedule	Behind Schedule
On Hold	On Hold
Not Started	Not Started

# Univ. Financials Portfolio Roadmap



2018

2019

2020

2021

FMS Get Current

FMS Get Current

FMS Get Current

Grants Portal I & II

Payment Works

IUC P Card / Bank

WRL Upgrade

