



# Executive Sponsors Meeting Business Area – Portfolios

04/13/2020

## Portfolios

- Enrollment Management
- Business Operations
- Capital Planning
- Graduate Education
- Human Resources
- Marketing and Communications
- Office of the Provost
- Public Safety
- Research and Economic Engagement
- Student Affairs
- Athletics
- University Advancement
- University Financials

# Enrollment Management Portfolio Overview

## **Portfolio Overview:**

The Enrollment Management 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”.**

Admission's File Review Workflow BPR –We are now working on identifying the future state recommended business and technical changes for each process.

2020 CS Get Current - (Application, Database, PeopleTools) – User testing has begun.

Federal Work Study BPR Outcomes Implementation – Working on making the first round of changes.

Firelands Pathway - Selection by Plan – Currently testing modifications to interfaces.

Implement PeopleSoft CS FLUID Delegate Access – Getting ready for user testing.

Revise Room Allotment Reports – Currently testing report 1 of 3.

Grade Change Form – Developing web form for students to be able to submit grading basis change.






2020-2021 Aid Year Updates For COD DL – Working to apply this maintenance to a user testing environment.

**ESC Portfolio Sponsor:** Cecilia Castellano

**ITS Portfolio Manager:** Todd Glick

# Enrollment Management Portfolio Overview

Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Implement FLUID in CSS - Phase II		Secondary Project	Not Scheduled	2/1/2019	12/31/2019	0%	Margo Kammeyer	Information Technology Service	Sheri Thomas	
Admission's File Review Workflow BPR	2	Project	On Schedule	12/30/2019	4/10/2020	60%	Michelle Schenk	Admissions Office	Erin Heilmeier	
2020 CS Get Current - (Application, Database, PeopleTools)	2	Project	On Schedule	2/17/2020	6/1/2020	40%	Tim Parish	Registrar	Michelle Rable	
Federal Work Study BPR Outcomes Implementation	1	Project	On Schedule	2/1/2020	6/30/2020	15%	Adam Petrea	Student Employment	Dawn Chong	
Firelands Pathway - Selection by Plan	1	Project	On Schedule	2/4/2020	7/1/2020	55%	Todd Glick	Registrar	Sue Lau	
Implement PeopleSoft CS FLUID Delegate Access	1	Project	On Schedule	2/5/2020	8/3/2020	25%	Todd Glick	Information Technology Service	Todd Glick	
Revise Room Allotment Reports - 2	1	Project	On Schedule	1/1/2019	10/1/2020	30%	Adam Petrea	Registrar	Kathy Dean	
Electronic Transfer Credit Appeals	1	Project	Not Scheduled	3/16/2020	12/6/2020	0%	Margo Kammeyer	Registrar	Rachel Schaeffer	
Change CIP Year field on NSC interface		Enhancement					Todd Glick	Registrar	Sue Lau	
Grade Change Form		Enhancement					Chris Wammes	Registrar	Sue Lau	
2020-2021 Aid Year Updates For COD DL		Enhancement					Todd Glick	Financial Aid	John Eggenton	
ATC Changes		Enhancement					Bridget Place	Admissions Office	Erin Heilmeier	
ATC Workflow		Enhancement					Lauren Hall	Registrar	Rachel Schaeffer	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled

# 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:**

This portfolio is progressing with no issues. Since the previous update, no enhancements or projects have completed. Two new enhancements have been added.

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

# Campus Operations, Planning, Design & Construction Portfolio Overview

BGSU

## **Portfolio Overview:**

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

## **Portfolio Health:**

This portfolio is progressing with no issues. Since the previous update, no enhancements or projects have completed, two new enhancements and one new project have been added.

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

**ITS Portfolio Manager:** Mike Hachtel

# Campus Operations, Planning, Design & Construction Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Evolve FM Implementation	1	Project	On Schedule	2/1/2020	5/10/2020	45%	Margo Kammeyer	Design & Construction	Daniel Lemmerbrock	On Schedule/Scheduled
Centralize Design & Construction's Project Materials in OnBase	1	Project	On Schedule	2/11/2020	5/29/2020	30%	Michelle Schenk	Design & Construction	Emily Nungester	On Schedule/Scheduled
FalconPurch and TMA Data Transfer	1	Project	On Schedule	3/6/2020	6/1/2020	10%	Tim Parish	Energy Management	Erin Keegan	On Schedule/Scheduled
Integrate Purchasing with Design & Construction OnBase Workflow	2	Project	On Schedule	3/17/2020	12/31/2020	15%	Michelle Schenk	Design & Construction	Emily Nungester	On Schedule/Scheduled
Integrate ArcGIS interactive maps with OnBase	2	Project	Not Scheduled			0%	Chris Wammes	Design & Construction	Gabrielle Paxton	Not Scheduled
Key Module Load and Use in WebTMA		Enhancement					Alex Pilcher	Engineering	Mark Hester	On Hold
WebTMA Vendor Supplied BPR		Enhancement					Alex Pilcher	Engineering	Mark Hester	On Hold
BAS Struxureware Upgrade and New VM for Niagara N4		Enhancement					Alex Pilcher	Energy Management	Craig DeHart	On Hold
Onbase CAD Document Viewer Intergration		Enhancement					Bridget Place	Design & Construction	Emily Nungester	On Hold
Implement TMA Parts for Campus Operations		Enhancement					Alex Pilcher	Campus Services	Troy Spikes	On Hold
Setup SSO for ShareBase		Enhancement					Chris Wammes	Design & Construction	Emily Nungester	On Hold



On Schedule/Scheduled
At Risk
Behind Schedule
On Hold
Not Scheduled



# Graduate Education Portfolio Overview

## **Portfolio Overview:**

The Graduate Education Portfolio is mostly comprised of Slate, OnBase, and graduation related projects. The majority of the projects are related to updating existing processes to increase efficiency, while the remaining will provide new services for students.

## **Portfolio Health:**

Currently, no projects under the Graduate Education portfolio are considered “at risk” or “behind schedule” and progress has been made on numerous projects and enhancements. In the past month, 2 projects (Electronic Graduate Student Curriculum Exception Process and Graduation Application Notification Communications) and 2 enhancements have been completed. Progress has been made on the Graduation BPR Outcomes (Policy), Feed UG GPA from Slate into CSS, and Graduation Application Self-Service Phase 2 projects, while a 3 projects are either on-hold or not started (awaiting information/resources). There are 3 new enhancement requests that are being worked on as resources allow.

**ESC Portfolio Sponsor:** Simon Morgan-Russell / Alex Goberman

**ITS Portfolio Manager:** Adam Petrea

# Graduate Education Portfolio Overview

Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Feed UG GPA from Slate into CSS	2	Project	On Schedule	7/29/2019	4/19/2020	85%	Richard Kasch	Graduate College	Angela McCutcheon	On Schedule
Graduate College BPR Outcomes Implementation (Policy Revision)	1	Project	On Schedule	9/16/2019	5/31/2020	65%	Adam Petrea	Graduate College	Alexander Goberman	On Schedule
Graduation Application Self-Service Enhancement (Phase 2) - 1	1	Project	On Schedule	9/2/2019	10/6/2020	45%	Richard Kasch	Marketing & Communications	Fred Connor	On Schedule
OnBase Enhancements for Graduate College - 5	2	Project	On Hold	8/13/2018	12/5/2019	55%	Bridget Place	Graduate College	Alexander Goberman	On Hold
GA Contracting BPR Process Updates	2	Project	On Hold	2/18/2019	3/27/2020	80%	Margo Kammeyer	Graduate College	Michele Schmitz	On Hold
Graduate College Contact List Automation	3	Project	Not Scheduled	9/1/2019	12/31/2019	0%	Sheri Thomas	Graduate College	Alexander Goberman	Not Scheduled
Auto push of GMAT and GRE Test Scores with PDL		Enhancement					Richard Kasch	Graduate College	Angela McCutcheon	On Schedule
Graduate Curriculum EForm Changes		Enhancement					Clinton LaForest	Graduate College	Stephanie Boman	On Schedule
GA Contracting App-Add student signature requirement logic.		Enhancement					Tim Hooper	Graduate College	Michele Schmitz	On Schedule
Update RR Folder Structure in OnBase		Enhancement					Bridget Place	Graduate College	Tammy Oelkrug	On Schedule

On Schedule
At Risk
Behind Schedule
On Hold
Not Scheduled

# Human Resources Portfolio Overview

## **Portfolio Overview:**

The Human Resources Portfolio is comprised of Office of Human Resources projects to enhance existing processes.

## **Portfolio Health:**

Most 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.

Enterprise Reporting - Phase IV:HR - on hold due to shortages in staff and other priorities.

2020 HCM Get Current - (Application, Database, PeopleTools) – Users are currently testing.

HCM Employee Self-Service & MyBGSU Fluid Update – Currently evaluating delivered FLUID functionality.

Age 50 Extension to include Terms/Retirements for current year – Beginning to make changes to the delivered process.

**ESC Portfolio Sponsor:** Viva McCarver

**ITS Portfolio Manager:** Todd Glick

# Human Resources Portfolio Overview

Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
2020 HCM Get Current - (Application, Database, PeopleTools)	2	Project	On Schedule	2/17/2019	6/1/2020	40%	Tim Parish	Human Resources	Beth Rife	On Schedule
HCM Employee Self-Service & MyBGSU Fluid Update	1	Project	On Schedule	2/5/2020	9/1/2020	25%	Margo Kammeyer	Information Technology Service	Todd Glick	On Schedule
PeopleSoft Personnel Action Forms Development	2	Project	On Hold	7/1/2018	6/30/2019	5%	Adam Petrea	Human Resources	Beth Rife	On Hold
Enterprise Reporting - Phase IV:HR	1	Project	On Hold	5/14/2015	12/31/2019	25%	Theresa Sherwood	Human Resources	Viva McCarver	On Hold
BPR - Adjunct Automation (OB to PS) and Grants Updates	2	Project	Not Scheduled	7/1/2018	6/30/2019	0%	Adam Petrea	Human Resources	Beth Rife	Not Scheduled
BPR - Supplemental Pay Automation	2	Project	Not Scheduled	7/1/2018	6/30/2019	0%	Sheri Thomas	Human Resources	Beth Rife	Not Scheduled
Age 50 Extension to include Terms/Retirements for current year		Enhancement					Todd Glick	Human Resources		

On Schedule
At Risk
Behind Schedule
On Hold
Not Scheduled

# 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 completed two enhancement requests, and made progress on the Class Search project. This is scheduled to go live on later this month. We've also had a couple of projects related to Adobe Campaign kicked off in March. We've had four new enhancements added this month.

**ESC Portfolio Sponsor:** Dave Kielmeyer

**ITS Portfolio Manager:** Chris Wammes

# Marketing & Comm Portfolio Overview

Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Align BGSU AEM with Industry Standards	2	Project	Scheduled	2/3/20	7/31/20	0%	Michelle Schenk	Marketing & Communications	Robb Nardecchia	
Class Search Direct Links/Parameters - 3	1	Project	On Schedule	8/19/19	4/30/20	70%	Adam Petrea	Marketing & Communications	Robb Nardecchia	
Adobe Campaign - Add Texting	1	Project	On Schedule	1/1/20	7/31/20	5%	Margo Kammeyer	Marketing & Communications	Beth Detwiler	
Adobe Campaign Phase 3 - College Friend Flag	2	Project	On Schedule	6/30/20	12/31/20	5%	Margo Kammeyer	Marketing & Communications	Beth Detwiler	
Decommission personal.bgsu.edu server		Enhancement					Andy Lynch	Marketing & Communications	Beth Detwiler	
Decommission math2.bgsu.edu server		Enhancement					Andy Lynch	Marketing & Communications	Beth Detwiler	
Online Dean's List and Graduation Information		Enhancement					Sue Tomor	Marketing & Communications	Amber Stark	
Adobe Targeting Capabilities within AEM		Enhancement					Clinton LaForest	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 Canvas Engagement Reporting project is new and is almost complete, providing the Kim Brooks' team with last Canvas login date of students. Both the Federal Work Study BPR Outcomes Implementation project and the Implement PeopleSoft web clock for student employees project were started recently and are on schedule. The Enhance Controls on Instructor Class Assignments project is scheduled but has not started. Five enhancements were completed and one new enhancement was started.

**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
Canvas Engagement Reporting	ASAP	Project	On Schedule	3/20/2020	3/27/2020	25%	Theresa Sherwood	V Prov Undergraduate Programs	Kimberlyn Brooks	On Schedule
EAB APS - Ongoing ITS Support	ASAP	Project	On Schedule	9/9/2019	3/31/2021	20%	Sue Tomor	Office of the Provost	Brigette Gibson	On Schedule
Academic Partnerships Implementation	ASAP	Project	On Schedule	6/25/2018	4/1/2020	90%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts	On Schedule
Undergraduate Writing Placement Notification Automation	1	Project	On Schedule	1/2/2020	4/27/2020	70%	Sue Tomor	English Department	Kelly Jennings	On Schedule
Federal Work Study BPR Outcomes Implementation	1	Project	On Schedule	2/1/2020	6/30/2020	15%	Adam Petrea	Student Employment	Dawn Chong	On Schedule
Implement PeopleSoft web clock for student employees	1	Project	On Schedule	2/4/2020	8/17/2020	10%	Andy Lynch	Student Employment	Dawn Chong	On Schedule
Experiential Learning Management Tool	1	Project	On Schedule	2/21/2019	10/1/2020	20%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts	On Schedule
Enhance Controls on Instructor Class Assignments	ASAP	Project	Scheduled	3/10/2020	10/1/2020	0%	Sue Tomor	Registrar	Michelle Rable	Not Scheduled
Avalon Upgrade to Current Release	2	Project	Not Scheduled	1/1/2018	2/28/2018	0%	Michelle Schenk	University Libraries	Michelle Chronister	Not Scheduled
Improve OnBase contract preparation (College end)	2	Project	Not Scheduled	1/7/2019	9/2/2019	0%	Sheri Thomas	A&S Dean	Connie Allison	Not Scheduled
Unicheck Pilot	1	Project	Not Scheduled	3/3/2020	8/6/2020	0%	Donald Schumacher	Information Technology Service	John Ellinger	Not Scheduled
SOAR Writing Placement Interface		Enhancement					Sue Tomor	English Department	Kelly Jennings	Not Scheduled
Load All Foreign Language Placement Test from Perpetual Works		Enhancement					Sue Tomor	World Languages and Cultures	Philip Peek	Not Scheduled

On Schedule
At Risk
Behind Schedule
On Hold
Not Scheduled



# Office of the Provost Portfolio Composition

Name	ESC Priority	Project Type	Status Name	Start	End	%	Manager	Acct/Dept	Sponsor	Health
Professional Development / Leave Request Form - Onbase Unity Form		Enhancement					Michelle Schenk	University Libraries	Jaime Spradlin	
Smartsheets Implementation		Enhancement					Adam Petrea	Office of the Provost	Davina Millin	
Foundation Purchase Request - Onbase Unity Form		Enhancement					Michelle Schenk	University Libraries	Jaime Spradlin	
Marketing and Promotional Funding Request - Unity Form		Enhancement					Michelle Schenk	University Libraries	Jaime Spradlin	
Create new Webcheckout center - Comm. Sciences & Disorders		Enhancement					Andy Lynch	Comm. Sciences & Disorders	Robin Monarch	
Implementation of CampDoc		Enhancement					Andy Lynch	Office of Student Retention	Kari Storm	
Create Learning Community Reports in Falcon Info		Enhancement					Gregory Brown	V Prov Undergraduate Programs	Brett Holden	
5 year headcount enrollment of VCT		Enhancement					Gregory Brown	Col of Technology Adm	Sudershan Jetley	
Data Warehouse - New eCampus Dashboard		Enhancement					Gregory Brown	On-Line & Summer Acad Progs	Paul Cesarini	
Graduation Rate Report Biology/A&S		Enhancement					Gregory Brown	A&S Dean	Marcus Sherrell	
Add FIG group data to data warehouse reports		Enhancement					Gregory Brown	Career Center	Cynthia Snodgrass	
Add additional instructor info to the Data Warehouse on Class Section Term		Enhancement					Theresa Sherwood	A&S Dean	Dale Klopfer	
Flight Center Schedule Solution		Enhancement					Adam Arthur	Flight Instruction	Bryan Combs	

	On Schedule
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled

# 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, no new projects or enhancements have been requested. The team has put together a plan for several improvements over the next few months. A Mobile parking application solution and an AI based parking space counter are currently under review. Several enhancement projects have been completed.

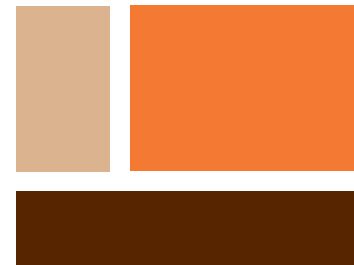
**ESC Portfolio Sponsor:** Sheri Stoll (Mike Campbell)

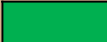




**ITS Portfolio Manager:** Mike Hachtel

# Public Safety Portfolio Composition



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



	On Schedule/Scheduled
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled

# Public Safety Portfolio Roadmap

2020

2021

Parking: Mobile functionality

Parking: Paperless services tracking

Parking: LPR/MEA integration

Parking: Automate Permit Renewal

Parking: Improved Camera Coverage (lots A, G, D, Q, 21)

Parking: Parking Lot Counter Pilot (April to July construction)

# 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:**

No new projects or enhancements have been requested since the previous update. The OSPR Business Process Review has been placed on hold awaiting business office recourses. The Community Engagement Application Implementation project is now complete.

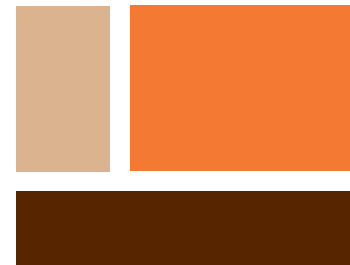
**ESC Portfolio Sponsor:** Mike Ogawa

**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	On Hold			5%	Andy Lynch	Sponsored Programs & Research	Thomas Kornacki	



	On Schedule/Scheduled
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled

# 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, one new project and two enhancements have been approved. Implementation of Portal X, the new Residence Life housing portal, has started.

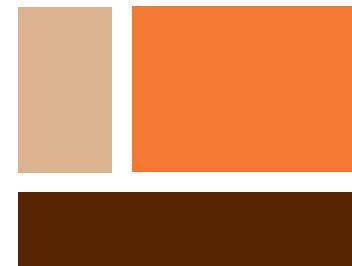
**ESC Portfolio Sponsor:** Tom Gibson

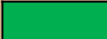




**ITS Portfolio Manager:** Mike Hachtel

# Student Affairs Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
PortalX Implementation	1	Project	On Schedule	3/16/2020	9/15/2020	10%	Margo Kammeyer	Office of Residence Life	Joshua Maxwell	On Schedule/Scheduled
RecTrac Upgrade to 10.3z01	2	Project	On Schedule	9/16/2019	3/22/2020	70%	Andy Lynch	Recreation and Wellness	Malissa Lambert	On Schedule/Scheduled
StarRez Stub Demo Replacement Interface	ASAP	Project	Not Scheduled			0%	Todd Glick	Office of Residence Life	Joshua Maxwell	Not Scheduled
RecWell System RFP	2	RFP	Not Scheduled			0%	Adam Petrea	Recreation and Wellness	Stephen Kampf	Not Scheduled
Modify BGJSF056 - UHC Enrollment by Policy Year		Enhancement					Sue Tomor	Health Services	Marlene Reynolds	On Hold
Integrate BG1 Ped Numbers with StarRez		Enhancement					Michelle Schenk	Office of Residence Life	Paul Ansted	On Hold



	On Schedule/Scheduled
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled



# Athletics Portfolio Overview

## **Portfolio Overview:**

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

## **Portfolio Health:**

This portfolio is progressing with no issues. Since the previous update, no enhancements or projects have completed. No additional projects or enhancements have been added to this portfolio.

**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
Paciolan Interface Project	1	Project	On Schedule	4/16/2019	11/1/2019	20%	Tim Parish	Intercollegiate Athletics	James Elsasser	On Schedule/Scheduled
TeamWorks Automation for Athletics - 6	2	Project	On Hold	7/1/2019	3/31/2020	35%	Michelle Schenk	Intercollegiate Athletics	Chet Hesson	On Hold
Falcon Club Implementation	1	Project	Not Scheduled	4/30/2018	12/31/2018	0%	Tim Parish	Information Technology Service	John Ellinger	Not Scheduled



	On Schedule/Scheduled
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled

# 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:**

This portfolio is progressing with no issues. Since the previous update, no enhancements or projects have completed. One new enhancement has been added and the RFP for the Agilon ONE system replacement has been put on hold while timing and resource availability is determined. The Falcon Club enhancement will remain on hold pending the development of automated interfaces by Paciolan.

**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
CDP (Contributor Development Partnership) Implementation	2	Project	On Schedule	1/13/2020	10/1/2020	25%	Tim Parish	WBGU-TV Television Service	Tina Simon	<span style="background-color: green; color: white;">On Schedule/Scheduled</span>
Donor Records Management and Consolidation	1	Project	Not Scheduled			0%	Sheri Thomas	Development Office	Kyle Crawford	<span style="background-color: yellow;">At Risk</span>
RFP for Replacement of Agilon One	1	RFP	On Hold			0%	Mike Hachtel	V P University Advancement	Pamela Conlin	<span style="background-color: red;">Behind Schedule</span>
Add Apple Pay to Scalefunder		Enhancement					Donald Schumacher	Capital Campaign	Sara Thompson	<span style="background-color: purple;">On Hold</span>
Annual Report Streamline		Enhancement					Donald Schumacher	Development Office	Laura Moore	<span style="background-color: purple;">On Hold</span>
Campaign Coding for Comprehensive Campaign		Enhancement					Donald Schumacher	Development Office	Sarah Brokamp	<span style="background-color: purple;">On Hold</span>
Falcon Club Young Alumni Gift Club		Enhancement					Donald Schumacher	Intercollegiate Athletics	Daniel Meyer	<span style="background-color: purple;">On Hold</span>
WRL Issue - Agilon		Enhancement					Carla Rinearson	Controller's Office	Nikki Eitle	<span style="background-color: purple;">On Hold</span>
Clear out Partial SSN Numbers (Agilon) Remove from Interface (BGC)		Enhancement					Donald Schumacher	Development Office	Kyle Crawford	<span style="background-color: purple;">On Hold</span>



<span style="background-color: green; color: white;">On Schedule/Scheduled</span>	On Schedule/Scheduled
<span style="background-color: yellow;">At Risk</span>	At Risk
<span style="background-color: red;">Behind Schedule</span>	Behind Schedule
<span style="background-color: purple;">On Hold</span>	On Hold
<span style="background-color: lightgrey;">Not Scheduled</span>	Not Scheduled

# 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:**

Since the previous update, no enhancements or projects have completed. One new enhancement has been added. Projects in this Portfolio are proceeding on schedule.

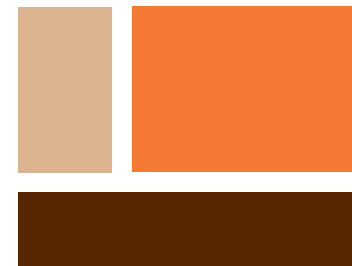
**ESC Portfolio Sponsor:** Sheri Stoll (Bob Swanson / Sharon Swartz)

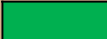




**ITS Portfolio Manager:** Mike Hachtel

# 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	5/31/2020	85%	Sue Tomor	Information Technology Service	John Ellinger	On Schedule/Scheduled
Academics Financials Reporting	1	Project	On Schedule	8/1/2018	10/31/2020	60%	Theresa Sherwood	Finance & Administration	Sherideen Stoll	On Schedule/Scheduled
Message FMS Project Id to CSS	2	Project	On Schedule	1/8/2020	5/3/2020	100%	Sue Tomor	Bursar's Office	Leann Peiffer	On Schedule/Scheduled
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 - AP Voucher scans through OnBase	2	Project	Not Scheduled			0%	Adam Petrea	Business Operations	Teresa Coss	Not Scheduled
Personal Banking and Address Change Approval Process	2	Project	Not Scheduled			0%	Sheri Thomas	Controller's Office	Bob Swanson	Not Scheduled
PaymentWorks - Phase 2		Enhancement					Andy Lynch	Business Operations	Phillip Worley	Not Scheduled
Improve Lightspeed Voucher Interface Reliability		Enhancement					Scott Blackwood	Controller's Office	Teresa Coss	Not Scheduled
Have Donor Reports in ODS pull from General Ledger Table		Enhancement					Carla Rinearson	Controller's Office	Vannon Heater	Not Scheduled
Apply HCM Patch - W-4 Issue Fix		Enhancement					Todd Glick	Controller's Office	Rhonda Dicke	Not Scheduled
Project Fund Rep Security Workflow		Enhancement					Adam Petrea	Controller's Office	Amy Beltano	Not Scheduled



	On Schedule/Scheduled
	At Risk
	Behind Schedule
	On Hold
	Not Scheduled

# 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

