



Executive Sponsors Meeting Business Area – Portfolios

02/10/2020

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 – BPR underway, half way through current state documentation.

Federal Work Study BPR Outcomes Implementation – Just getting started in reviewing BPR outcomes.

Advanced Placement Program ® (AP) File Automation –BGSU is now importing the AP file into Slate. Slate will send the information to OnBase, then interface the information into u.Achieve. Development is in progress and on schedule.

Firelands Pathway - Selection by Plan – Changes have been identified and development has begun.

Revise Room Allotment Reports – Project is restarting. Continuing development for reports.

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
Federal Work Study BPR Outcomes Implementation	1	Project	Scheduled	2/1/2020	6/30/2020	5%	Adam Petrea	Student Employment	Dawn Chong	On Schedule
Firelands Pathway - Selection by Plan	1	Project	On Schedule	6/10/2019	1/31/2020	5%	Todd Glick	Registrar	Sue Lau	On Schedule
Admission's File Review Workflow BPR	2	Project	On Schedule	12/30/2019	4/10/2020	30%	Michelle Schenk	Admissions Office	Erin Heilmeier	On Schedule
Advanced Placement Program® (AP) File Automation	1	Project	On Schedule	10/1/2019	4/30/2020	30%	Margo Kammeyer	Registrar	Rachel Schaeffer	On Schedule
Revise Room Allotment Reports - 2	1	Project	On Schedule	1/1/2019	10/1/2020	20%	Adam Petrea	Registrar	Kathy Dean	On Schedule
2020 CS Get Current - (Application, Database, PeopleTools)	2	Project	Not Scheduled	4/1/2020	9/30/2020	0%	Tim Parish	Registrar	Michelle Rable	Not Scheduled
External System Affiliates Update		Enhancement					Todd Glick	Registrar	Becky Cogswell	On Schedule
Winter Session Census Waitlist Indicator Request		Enhancement					Carla Rinearson	Financial Aid	Jason Hartigan	On Schedule
ATC Workflow		Enhancement					Lauren Hall	Registrar	Rachel Schaeffer	On Schedule
OAR Post Process Updates - Residency Data		Enhancement					Todd Glick	Admissions Office	Christine Alejo	On Schedule

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. The Transact upgrade project and one enhancement have completed. A project to upgrade the Compliance Suite database and one additional enhancement have been added since the previous update.

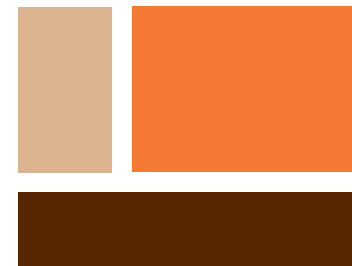
ESC Portfolio Sponsor: Sheri Stoll (Brad Leigh)

ITS Portfolio Manager: Mike Hachtel

BusOps/Auxiliary Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Upgrade Compliance Suite for OSHA Incidence Reporting	2	Project	Not Scheduled			0%	Andy Lynch	Business Operations	Kimberly Griner	
CBORD/LCD/Web New Venue Pom & Honey Needs Added		Enhancement				75%	Renee Appelhans	Dining Services	Jon Zachrich	
Peoplesoft Integration into Hometown Ticketing		Enhancement				5%	Michelle Schenk	School of Art	Jason Walton	
Add pdf print to dispatch PO option as the default		Enhancement				15%	David Hoops	Business Operations	Kristina Rhine	
Integrate BG1 Ped Numbers with StarRez		Enhancement				0%	Michelle Schenk	Office of Residence Life	Paul Ansted	



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

Campus Operations, Planning, Design & Construction Portfolio Overview

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, the project to implement the new Evolve FM space management software has been approved. Two enhancements have been added. One enhancement and the Space management RFP have completed.

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
Centralize Design & Construction's Project Materials in OnBase	1	Project	Scheduled	2/11/2020	5/29/2020	5%	Michelle Schenk	Design & Construction	Emily Nungester	On Schedule/Scheduled
Evolve FM Implementation	1	Project	Not Scheduled			0%	Margo Kammeyer	Design & Construction	Daniel Lemmerbrock	At Risk
Integrate Purchasing with Design & Construction OnBase Workflow	2	Project	Not Scheduled			0%	Sheri Thomas	Design & Construction	Emily Nungester	Behind Schedule
Integrate ArcGIS interactive maps with OnBase	2	Project	Not Scheduled			0%	Sheri Thomas	Design & Construction	Gabrielle Paxton	On Hold
Key Module Load and Use in WebTMA		Enhancement				0%	Alex Pilcher	Engineering	Mark Hester	Not Scheduled
WebTMA Vendor Supplied BPR		Enhancement				0%	Alex Pilcher	Engineering	Mark Hester	Not Scheduled
Onbase CAD Document Viewer Intergration		Enhancement				0%	Chris Wammes	Design & Construction	Emily Nungester	Not Scheduled



On Schedule/Scheduled	On Schedule/Scheduled
At Risk	At Risk
Behind Schedule	Behind Schedule
On Hold	On Hold
Not Scheduled	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”. Six projects are considered “on schedule”, with one “on hold” (pending resource availability), and one is “not scheduled” (low priority – 3). Significant progress has been made on two projects, Feed UG GPA and Electronic Graduate Student Curriculum Exception (which is expected to complete this month). The Graduation Application Self-Service Enhancement (Phase 2) has been taken off hold and a new end date is expected to be set by the project team shortly. Scope has been defined for the final stage of the Graduate College BPR Outcomes Implementation, and once approved by the Graduate College, development resources will begin work.

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
Graduation Application Self-Service Enhancement (Phase 2) - 1	1	Project	On Schedule	9/2/2019	1/6/2020	20%	Richard Kasch	Marketing & Communications	Fred Connor	On Schedule
Electronic Graduate Student Curriculum Exception Process	1	Project	On Schedule	7/15/2019	2/15/2020	85%	Sue Tomor	Graduate College	Alexander Goberman	On Schedule
Feed UG GPA from Slate into CSS	2	Project	On Schedule	7/29/2019	2/28/2020	70%	Richard Kasch	Graduate College	Angela McCutcheon	On Schedule
GA Contracting BPR Process Updates	2	Project	On Schedule	2/18/2019	3/27/2020	75%	Margo Kammeyer	Graduate College	Michele Schmitz	On Schedule
Graduation Application Notification Communications (Phase 1)	1	Project	On Schedule	3/5/2019	3/31/2020	80%	Richard Kasch	Marketing & Communications	Beth Detwiler	On Schedule
Graduate College BPR Outcomes Implementation	1	Project	On Schedule	9/16/2019	5/31/2020	50%	Adam Petrea	Graduate College	Alexander Goberman	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
Graduate College Contact List Automation	3	Project	Not Scheduled	9/1/2019	12/31/2019	0%	Sheri Thomas	Graduate College	Alexander Goberman	Not Scheduled
Add a HOLD Indicator to CSS Export File		Enhancement					Michelle Schenk	Graduate College	Angela McCutcheon	On Schedule
Auto push of GMAT and GRE Test Scores with PDL		Enhancement					Richard Kasch	Graduate College	Angela McCutcheon	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.

Common Remitter Interface Implementation – Continuing work on the feedback interface and making adjustments to the remittance interface.

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

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
Common Remitter Interface Implementation	ASAP	Project	On Schedule	3/26/2019	1/1/2020	95%	Tim Parish	Human Resources	Beth Rife	At Risk
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
2020 HCM Get Current - (Application, Database, PeopleTools)	2	Project	Not Scheduled	4/1/2019	9/30/2020	0%	Tim Parish	Human Resources	Beth Rife	Not Scheduled



	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 have completed two Enhancement requests. We have also made significant progress on the Class Search progress. We have two Adobe Campaign projects that are scheduled to kick off later in the Spring.

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
Class Search Direct Links/Parameters - 3	1	Project	On Schedule	8/19/19	4/30/20	20%	Adam Petrea	Marketing & Communications	Robb Nardecchia	On Schedule
Align BGSU AEM with Industry Standards	2	Project	Not Scheduled	11/11/19	2/6/20	0%	Sheri Thomas	Marketing & Communications	Robb Nardecchia	At Risk
Add Texting to Adobe Campaign	1	Project	Not Scheduled	1/1/20	7/31/20	0%	Margo Kammeyer	Marketing & Communications	Beth Detwiler	Behind Schedule
Adobe Campaign Phase 3 - College Friend Flag	2	Project	Not Scheduled	6/30/20	12/31/20	0%	Margo Kammeyer	Marketing & Communications	Beth Detwiler	On Hold
AEM Request: Adaptive Image within Callout Box		Enhancement					Chris Wammes	Marketing & Communications	Robb Nardecchia	Not Started



	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 EDHD Program Assessment Lean Process Review project is almost complete with a report-out happening soon. The Undergraduate Writing Placement Notification Automation project was started with the creation of the project charter. Progress is being made on creating the invoice file for the Academic Partnerships Implementation project. One new project, Federal Work Study BPR Outcomes Implementation, and five new enhancements were added to the portfolio last month.

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
Federal Work Study BPR Outcomes Implementation	1	Project	Scheduled		2/1/2020	6/30/2020	5%	Adam Petrea	Student Employment	Dawn Chong	On Schedule
EDHD Program Assessment Lean Process Review	2	Project	On Schedule		10/18/2019	1/31/2020	95%	Margo Kammeyer	College of Education - Admin	Brian Campbell	On Schedule
Academic Partnerships Implementation	ASAP	Project	On Schedule		6/25/2018	4/1/2020	75%	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	10%	Sue Tomor	English Department	Kelly Jennings	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
EAB APS - Ongoing ITS Support	ASAP	Project	On Schedule		9/9/2019	3/31/2021	15%	Sue Tomor	Office of the Provost	Brigette Gibson	On Schedule
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
Load All Foreign Language Placement Test from Perpetual Works		Enhancement						Sue Tomor	World Languages and Cultures	Philip Peek	On Hold
WebCAPE Upgrade to 2.0 and Perpetual Works Test Score Load		Enhancement						Sue Tomor	World Languages and Cultures	Amy Smith	On Hold
Migration of Navigate Calendar Sync from service accounts to OAuth		Enhancement						Michelle Schenk	V Prov Undergraduate Programs	Kimberlyn Brooks	On Hold
Navigate and Canvas Integration		Enhancement						Adam Petrea	V Prov Undergraduate Programs	Kimberlyn Brooks	On Hold
Smartsheets Implementation		Enhancement						Adam Petrea	Office of the Provost	Davina Millin	On Hold

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
Europe's New General Data Privacy Regulation (GDPR) for Handshake		Enhancement						Andy Lynch	Career Center	Danielle Dimoff	
Create new Webcheckout center - Comm. Sciences & Disorders		Enhancement						Andy Lynch	Comm. Sciences & Disorders	Robin Monarch	
Professional Development / Leave Request Form - Onbase Unity Form		Enhancement						Michelle Schenk	University Libraries	Jaime Spradlin	
Foundation Purchase Request - Onbase Unity Form		Enhancement						Michelle Schenk	University Libraries	Jaime Spradlin	
Implementation of CampDoc		Enhancement						Andy Lynch	Office of Student Retention	Kari Storm	
Marketing and Promotional Funding Request - Unity Form		Enhancement						Michelle Schenk	University Libraries	Jaime Spradlin	
DW - update DEG-001 OBIEE		Enhancement						Gregory Brown	School of Media and Comm	Laura Stafford	
Data Warehouse - New eCampus Dashboard		Enhancement						Gregory Brown	On-Line & Summer Acad Progs	Paul Cesarini	
5 year headcount enrollment of VCT		Enhancement						Gregory Brown	Col of Technology Adm	Sudershan Jetley	
Create Learning Community Reports in Falcon Info		Enhancement						Gregory Brown	V Prov Undergraduate Programs	Brett Holden	
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

Office of the Provost Portfolio Composition

Name	ESC Priority	Project Type	Status	Name	Start	End	%	Manager	Acct/Dept	Sponsor	Health
Graduation Rate Report	Biology/A&S	Enhancement						Gregory Brown	A&S Dean	Marcus Sherrell	

	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 is currently under review. Two enhancements, including A.L.I.C.E. training in Bridge, have completed.

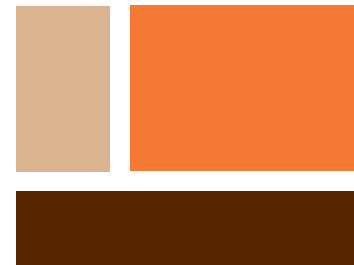
ESC Portfolio Sponsor: Sheri Stoll (Mike Campbell)

ITS Portfolio Manager: Mike Hachtel

Public Safety Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Upgrade BGSU Police Dispatch Radio Computers		Enhancement				5%	Michelle Schenk	Police Division	Matthew Keefe	On Schedule/Scheduled



On Schedule/Scheduled	On Schedule/Scheduled
At Risk	At Risk
Behind Schedule	Behind Schedule
On Hold	On Hold
Not Scheduled	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 requested and none have completed since the previous update. Both projects in this portfolio, including the OSPR Business Process Review are in progress.

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 Schedule	7/15/2019	2/28/2020	5%	Andy Lynch	Sponsored Programs & Research	Thomas Kornacki	On Schedule/Scheduled
Community Engagement Application Implementation	3	Project	On Schedule	10/31/2019	3/31/2020	60%	Adam Petrea	Community and Civic Engagement	V Jane Rosser	On Schedule/Scheduled

	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, no new projects or enhancement have been completed or requested. ITS is working with several departments within Student Affairs (ResLife & RecWell) to review several upcoming requests.

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
Evaluate Timeclock Use on Campus	2	Project	On Schedule	7/7/2019	12/31/2019	100%	Andy Lynch	Information Technology Service	Joel Arakaki	On Schedule/Scheduled
RecTrac Upgrade to 10.3z01	2	Project	On Schedule	9/16/2019	3/22/2020	35%	Andy Lynch	Recreation and Wellness	Malissa Lambert	On Schedule/Scheduled
Integrate BG1 Ped Numbers with StarRez		Enhancement				0%	Michelle Schenk	Office of Residence Life	Paul Ansted	At Risk
Modify Job BGJSF056 - UHC Student Enrollment by Plan Year		Enhancement				0%	Sue Tomor	Health Services	Marlene Reynolds	Behind Schedule



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, both the Paciolan Interface project and the TeamWorks project have started. No additional projects or enhancement have been added in the past month.

ESC Portfolio Sponsor: Bob Moosbrugger

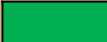




ITS Portfolio Manager: Mike Hachtel

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	10%	Tim Parish	Intercollegiate Athletics	James Elsasser	On Schedule/Scheduled
TeamWorks Automation for Athletics - 6	2	Project	On Schedule	7/1/2019	3/31/2020	35%	Michelle Schenk	Intercollegiate Athletics	Chet Hesson	On Schedule/Scheduled
Falcon Club Implementation	1	Project	Not Scheduled			0%	Tim Parish	Information Technology Service	John Ellinger	Not Scheduled
Schmidthorst Hertiage Hall Interactive Display		Enhancement				80%	Chris Wammes	Intercollegiate Athletics	James Elsasser	On Schedule/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:

ITS is assisting University Advancement with a review of the current services business processes and the Agilon ONE system for replacement. The Falcon Club enhancement will remain on hold pending the development of automated interfaces by Paciolan. One enhancement has completed since the previous update. One new project and two enhancements have been added.

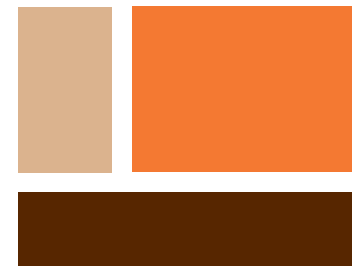
ESC Portfolio Sponsor: Pam Conlin

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	6/30/2020	5%	Tim Parish	WBGU-TV Television Service	Tina Simon	On Schedule/Scheduled
Add Apple Pay to Scalefunder		Enhancement				25%	Donald Schumacher	Capital Campaign	Sara Thompson	At Risk
Falcon Club Young Alumni Gift Club		Enhancement				0%	Donald Schumacher	Intercollegiate Athletics	Daniel Meyer	Behind Schedule
WRL Issue - Agilon		Enhancement				0%	Carla Rinearson	Controller's Office	Nikki Eitle	On Hold



On Schedule/Scheduled	On Schedule/Scheduled
At Risk	At Risk
Behind Schedule	Behind Schedule
On Hold	On Hold
Not Scheduled	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, the yearly project to add updates to the 1099 process has completed. Five projects are progressing on schedule including the FMS Get Current project that is scheduled to complete the weekend before ESC. One new enhancement has been added to the portfolio. Projects in this Portfolio are proceeding on schedule.

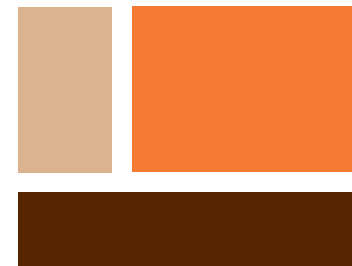
ESC Portfolio Sponsor: Sheri Stoll (Bob Swanson / Sharon Swartz)

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	3/31/2020	80%	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
FMS Get Current 2020	2	Project	On Schedule	11/1/2019	2/16/2020	95%	Tim Parish	Controller's Office	Bob Swanson	On Schedule/Scheduled
Decommission Agresso System	2	Project	On Schedule	4/1/2019	2/29/2020	95%	Tim Parish	Controller's Office	Stacey Beckner	On Schedule/Scheduled
Message FMS Project Id to CSS	2	Project	On Schedule	1/8/2020	5/3/2020	25%	Sue Tomor	Bursar's Office	Leann Peiffer	On Schedule/Scheduled
PeopleSoft Personnel Action Forms Development	2	Project	On Hold			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
Modify BGSF055 for IPP Codes to Close in CashNet		Enhancement				43%	Todd Glick	Bursar's Office	Leann Peiffer	At Risk
PaymentWorks - Phase 2		Enhancement				10%	Andy Lynch	Business Operations	Phillip Worley	At Risk



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

