



Executive Sponsors Meeting Business Area – Portfolios

05/11/2020

Portfolios

- Enrollment Management
- Business Operations
- Campus Operations / Capital Planning / Design & Construction
- 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 — outcomes and recommendations document have been created. Follow-up project to implement the items included in the report ready for approval.

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

Federal Work Study BPR Outcomes Implementation – Testing is in-progress for the 1st round of changes, development is almost complete on the 2nd round.

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

Implement PeopleSoft CS FLUID Delegate Access – Developing search functionality.

Revise Room Allotment Reports – testing rework on 1st report, we are assuming this round will clear up any open issues so we can start focusing on the 2nd and 3rd.

Electronic Transfer Credit Appeals – Functional requirements have been gathered. Ready to begin development.

ACT Test Score Changes – Project is beginning this month.

Change CIP Year Field on NSC interface – Currently user testing the change.

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
Admission's File Review Workflow BPR	2	Project	On Schedule	12/30/2019	4/10/2020	85%	Michelle Schenk	Admissions Office	Erin Heilmeier	
2020 CS Get Current - (Application, Database, PeopleTools)	2	Project	On Schedule	2/17/2020	6/1/2020	75%	Tim Parish	Registrar	Michelle Rable	
Federal Work Study BPR Outcomes Implementation	1	Project	On Schedule	2/1/2020	6/30/2020	30%	Adam Petrea	Student Employment	Dawn Chong	
Firelands Pathway - Selection by Plan	1	Project	On Schedule	2/4/2020	7/1/2020	75%	Todd Glick	Registrar	Sue Lau	
Electronic Transfer Credit Appeals	1	Project	On Schedule	3/16/2020	8/2/2020	10%	Margo Kammeyer	Registrar	Rachel Schaeffer	
Implement PeopleSoft CS FLUID Delegate Access	1	Project	On Schedule	2/5/2020	8/3/2020	50%	Todd Glick	Information Technology Service	Todd Glick	
ACT Test Score Changes	1	Project	On Schedule	4/1/2020	9/21/2020	5%	Margo Kammeyer	Admissions Office	Dustin Sabo	
Revise Room Allotment Reports - 2	1	Project	On Schedule	1/1/2019	10/1/2020	35%	Adam Petrea	Registrar	Kathy Dean	
Update Student Financial Aid Search Match	1	Project	Not Scheduled	4/13/2020	6/21/2020	0%	Sheri Thomas	Financial Aid	John Eggenton	
Additional Data for Prospective Student Tracking in Slate	1	Project	Not Scheduled	4/2/2020	10/9/2020	0%	Sheri Thomas	Admissions Office	Dustin Sabo	
Change CIP Year field on NSC interface		Enhancement					Todd Glick	Registrar	Sue Lau	

	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, two enhancements have completed, including an upgrade to the Transact application and an added feature to print dispatch POs electronically into .pdf format. Two new enhancements and one new project 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
PageDNA Implementation	2	Project	On Schedule	3/23/2020	8/28/2020	10%	Margo Kammeyer	Postal Services	Jeremy VanTress	At Risk
Upgrade Compliance Suite for OSHA Incidence Reporting	2	Project	Scheduled	1/14/2019	2/28/2020	5%	Andy Lynch	Business Operations	Kimberly Griner	At Risk
Peoplesoft Integration into Hometown Ticketing		Enhancement					Michelle Schenk	School of Art	Jason Walton	On Hold
Integrate BG1 Ped Numbers with StarRez		Enhancement					Michelle Schenk	Office of Residence Life	Paul Ansted	On Hold
Sequoia and CBORD Reporting in the Web Report Library		Enhancement					Richard Kasch	Dining Services	Susan Reynolds	On Hold
Dining Services Process Review		Enhancement					Mike Hachtel	Dining Services	Susan Reynolds	On Hold
Outfitters & Catering Mobile Solution Review		Enhancement					Renee Appelhans	Information Technology Service	Mike Hachtel	On Hold



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, no enhancements or projects have completed. One new enhancement and one new project have been added have been added.

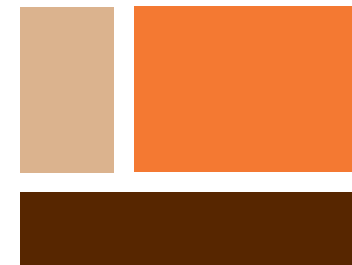
ESC Portfolio Sponsor: Sheri Stoll (Bruce Meyer)

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	65%	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	55%	Michelle Schenk	Design & Construction	Emily Nungester	On Schedule/Scheduled
FalconPurch and TMA Data Transfer	1	Project	On Schedule	3/6/2020	6/1/2020	20%	Tim Parish	Energy Management	Erin Keegan	On Schedule/Scheduled
Campus Ops Work Processes Lean BPR	1	Project	On Schedule	4/13/2020	8/14/2020	10%	Margo Kammeyer	Campus Operations	Andrea Depinet	On Schedule/Scheduled
Integrate Purchasing with Design & Construction OnBase Workflow	2	Project	On Schedule	3/17/2020	12/31/2020	55%	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
Setup SSO for ShareBase		Enhancement					Chris Wammes	Design & Construction	Emily Nungester	On Hold
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
Implement TMA Parts for Campus Operations		Enhancement					Alex Pilcher	Campus Services	Troy Spikes	On Hold
Onbase CAD Document Viewer Intergration		Enhancement					Bridget Place	Design & Construction	Emily Nungester	On Hold
Implement ShareBase		Enhancement					Michelle Schenk	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 a number of projects and enhancements. In the past month, the Feed UG GPA from Slate into CSS project was completed and a new project was added to the portfolio (Graduate Student OnBase Portal). Progress has been made on both “On Schedule” projects, as well as the 4 enhancement requests that are being worked on as time and 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
Graduate College BPR Outcomes Implementation (Policy Revision)	1	Project	On Schedule	9/16/2019	8/1/2020	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	50%	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
Graduate Student OnBase Portal	1	Project	Not Scheduled	4/1/2020	8/31/2020	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	Not Scheduled
Graduate Curriculum EForm Changes		Enhancement					Clinton LaForest	Graduate College	Stephanie Boman	Not Scheduled
Update RR Folder Structure in OnBase		Enhancement					Bridget Place	Graduate College	Tammy Oelkrug	Not Scheduled
GA Contracting App-Add student signature requirement logic.		Enhancement					Tim Hooper	Graduate College	Michele Schmitz	Not Scheduled

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. Go-Live Scheduled: May 29th

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

Age 50 Extension to include Terms/Retirements for current year – Currently user testing modification.

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	75%	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	30%	Margo Kammeyer	Information Technology Service	Todd Glick	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
Age 50 Extension to include Terms/Retirements for current year		Enhancement					Todd Glick	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 our Class Search project, we've also kicked off our Align BGSU AEM with Industry Standards project as well as a enhancement to update our Adobe Target integration. All projects continue to make good progress.

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	On Schedule	2/3/20	9/30/20	5%	Michelle Schenk	Marketing & Communications	Robb Nardecchia	On Hold
Adobe Campaign - Add Texting	1	Project	On Schedule	1/1/20	12/31/20	5%	Margo Kammeyer	Marketing & Communications	Beth Detwiler	On Hold
Adobe Campaign Phase 3 - College Friend Flag	2	Project	On Schedule	6/30/20	12/31/20	15%	Margo Kammeyer	Marketing & Communications	Beth Detwiler	On Hold
Decommission personal.bgsu.edu server		Enhancement					Andy Lynch	Marketing & Communications	Beth Detwiler	On Hold
Decommission math2.bgsu.edu server		Enhancement					Andy Lynch	Marketing & Communications	Beth Detwiler	On Hold
Online Dean's List and Graduation Information		Enhancement					Sue Tomor	Marketing & Communications	Amber Stark	On Hold
Adobe Targeting Capabilities within AEM		Enhancement					Clinton LaForest	Marketing & Communications	Robb Nardecchia	On Hold

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 and Undergraduate Writing Placement Notification Automation project were completed this month. The Academic Partnerships Implementation project is on track for completion in June. The Enhance Controls on Instructor Class Assignments project and WebCAPE 2.0 Upgrade and Test Score Web Service project were both started and are on schedule. Three enhancements were completed and four new enhancements were 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
Academic Partnerships Implementation	ASAP	Project	On Schedule		6/25/2018	4/1/2020	95%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts	
Federal Work Study BPR Outcomes Implementation	1	Project	On Schedule		2/1/2020	6/30/2020	40%	Adam Petrea	Student Employment	Dawn Chong	
Implement PeopleSoft web clock for student employees	1	Project	On Schedule		2/4/2020	8/17/2020	25%	Andy Lynch	Student Employment	Dawn Chong	
Enhance Controls on Instructor Class Assignments	ASAP	Project	On Schedule		3/10/2020	10/1/2020	25%	Sue Tomor	Registrar	Michelle Rable	
Experiential Learning Management Tool	1	Project	On Schedule		2/21/2019	10/1/2020	25%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts	
WebCAPE 2.0 Upgrade and Test Score Web Service	2	Project	On Schedule		4/13/2020	10/18/2020	15%	Sue Tomor	World Languages and Cultures	Amy Smith	
EAB APS - Ongoing ITS Support	ASAP	Project	On Schedule		9/9/2019	3/31/2021	25%	Sue Tomor	Office of the Provost	Brigitte Gibson	
Avalon Upgrade to Current Release	2	Project	Not Scheduled		1/1/2018	2/28/2018	0%	Michelle Schenk	University Libraries	Michelle Chronister	
Improve OnBase contract preparation (College end)	2	Project	Not Scheduled		1/7/2019	9/2/2019	0%	Sheri Thomas	A&S Dean	Connie Allison	
Unicheck Pilot	1	Project	Not Scheduled		3/3/2020	8/6/2020	0%	Donald Schumacher	Information Technology Service	John Ellinger	
Load All Foreign Language Placement Test from Perpetual Works		Enhancement						Sue Tomor	World Languages and Cultures	Philip Peek	
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	

	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
Implementation of CampDoc		Enhancement						Andy Lynch	Office of Student Retention	Kari Storm	
Minecraft EDU Initiative		Enhancement						Adam Petrea	School of Teaching & Learning	Mark Stevens	
Smartsheets Implementation		Enhancement						Adam Petrea	Office of the Provost	Davina Millin	
Create new Webcheckout center - Comm. Sciences & Disorders		Enhancement						Andy Lynch	Comm. Sciences & Disorders	Robin Monarch	
Graduation Rate Report Biology/A&S		Enhancement						Gregory Brown	A&S Dean	Marcus Sherrell	
Update ACT/SAT Calculation in Online Math Placement		Enhancement						Chris Wammes	Math and Statistics Dept	Craig Zirbel	
Data Warehouse - New eCampus Dashboard		Enhancement						Gregory Brown	On-Line & Summer Acad Progs	Paul Cesarini	
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	
MyBGSU - Faculty Town Hall Stream		Enhancement						Chris Wammes	Marketing & Communications	Beth Detwiler	
G-Suite Interface Updates (related to ticket 1057735)		Enhancement						Todd Glick	College of Education - Admin	Mitch Miller	

	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, the project to add the PayByPhone mobile parking app with integration to the BGSU Parking application has been approved and implementation is in progress. No additional enhancements nor projects have been added or 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
PayByPhone Implementation	2	Project	On Schedule	4/13/2020	8/2/2020	25%	Tim Parish	Parking Services	Thomas Kelly	



	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.

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 with no issues. Since the previous update, two new projects have been approved. Implementation of the new Residence Life housing portal, Portal X, including improvements to the encryption and interfaces is progressing on schedule.

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 - StarRez Stub Demo Replacement Interface	ASAP	Project	On Schedule	5/1/2020	9/15/2020	5%	Margo Kammeyer	Office of Residence Life	Joshua Maxwell	On Schedule/Scheduled
PortalX Implementation	1	Project	On Schedule	3/16/2020	9/13/2020	15%	Margo Kammeyer	Office of Residence Life	Joshua Maxwell	On Schedule/Scheduled
RecTrac Upgrade to 10.3z01	2	Project	On Schedule	9/16/2019	5/13/2020	85%	Andy Lynch	Recreation and Wellness	Malissa Lambert	On Schedule/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
PortalX Encryption of in-place files stored in server-side Amazon		Enhancement					Margo Kammeyer	Office of Residence Life	Md Rezwan Islam	On Hold
PortalX - StarRez - Removal of Last Run Date Field		Enhancement					Margo Kammeyer	Office of Residence Life	Joshua Maxwell	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:

The implementation of the Paciolan ticketing system and the automation of data interfaces continues to proceed. 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	30%	Tim Parish	Intercollegiate Athletics	James Elsasser	On Schedule/Scheduled
Falcon Club Implementation	1	Project	Not Scheduled			0%	Tim Parish	Information Technology Service	John Ellinger	At Risk
TeamWorks Automation for Athletics - 6	2	Project	On Hold			35%	Michelle Schenk	Intercollegiate Athletics	Chet Hesson	On Hold



	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:

The projects and enhancements in this portfolio are progressing. Since the previous update, two enhancements 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. The enhancement for adding ApplePay to Scalefunder has slowed, awaiting new development from the vendor.

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
Donor Records Management and Consolidation	1	Project	Not Scheduled			0%	Sheri Thomas	Development Office	Kyle Crawford	
RFP for Replacement of Agilon One	1	RFP	On Hold			0%	Mike Hachtel	V P University Advancement	Pamela Conlin	
CDP (Contributor Development Partnership) Implementation	2	Project	On Schedule	1/13/2020	10/1/2020	25%	Tim Parish	WBGU-TV Television Service	Tina Simon	
Add Apple Pay to Scalefunder		Enhancement					Donald Schumacher	Capital Campaign	Sara Thompson	
Campaign Coding for Comprehensive Campaign		Enhancement					Donald Schumacher	Development Office	Sarah Brokamp	
Remove SSNs from Alumni Interfaces and Agilon		Enhancement					Sue Tomor	Development Office	Kyle Crawford	
Falcon Club Young Alumni Gift Club		Enhancement					Donald Schumacher	Intercollegiate Athletics	Daniel Meyer	
Corpus Spending Field Update for Non-Endowed Fund		Enhancement					Donald Schumacher	Development Office	Laura Moore	



	On Schedule/Scheduled
	At Risk
	Behind Schedule
	On Hold
	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 project to message FMS project IDs to CSS has completed. Two new enhancements has been added. Projects and enhancements in this Portfolio are proceeding on schedule.

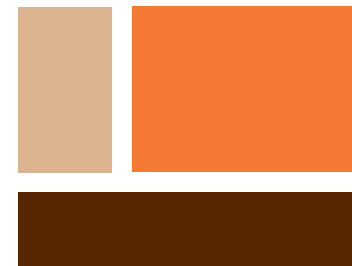
ESC Portfolio Sponsor: Sheri Stoll (Bob Swanson / Sharon Swartz)

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
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
Improve Lightspeed Voucher Interface Reliability		Enhancement					Scott Blackwood	Controller's Office	Teresa Coss	On Schedule/Scheduled
Have Donor Reports in ODS pull from General Ledger Table		Enhancement					Carla Rinearson	Controller's Office	Vannon Heater	On Schedule/Scheduled
Apply HCM Patch - W-4 Issue Fix		Enhancement					Todd Glick	Controller's Office	Rhonda Dicke	On Schedule/Scheduled
PaymentWorks - Phase 2		Enhancement					Andy Lynch	Business Operations	Phillip Worley	On Schedule/Scheduled
Project Fund Rep Security Workflow		Enhancement					Adam Petrea	Controller's Office	Amy Beltano	On Schedule/Scheduled
Changes to Journal Workflow for Grants		Enhancement					Adam Petrea	Controller's Office	Kate Behr	On Schedule/Scheduled
Create Equation Engine for Master of Athletic Training		Enhancement					Sue Tomor	Bursar's Office	Rhonda Montague	On Schedule/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

