



Executive Sponsors Meeting Business Area – Portfolios

09/14/2020

Portfolios

- Enrollment Management
- Business Operations
- Campus Operations / Capital Planning / Design & Construction
- Graduate Education
- Human Resources
- Office of the Provost
- Public Safety
- Research and Economic Engagement
- Student Affairs
- Athletics
- University Advancement
- University Financials

Enrollment Management Portfolio

Overview

BGSU®

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:

Admission's File Review Workflow BPR – Waiting for the Admission's Office to have resources to determine to determine full requirements.

Federal Work Study BPR Outcomes Implementation – Currently being tested by the users with the goal of migrating to Production before the start of Fall semester.

Revise Room Allotment Reports – On hold at the users request.

Increase Program Table Description Field – Implemented update to official transcript, determining the

Electronic Transfer Credit Appeals – On hold waiting for a OnBase resource.

ACT Test Score Changes & SAT Superscore Calculation – Slate development team working on creating interface to CSS.

Change CIP Year Field on NSC interface – Ready to implement when NCS is ready.

Update Student Financial Aid Search Match – Gathering requirements and beginning development.

International Application - Student Birthplace – CSS development has completed, Slate development and testing underway

Guest and Readmit Student Application Update – Slate development team is building the application(s) and mapping data to CSS OAR. ITS will assist as needed.

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
Increase Program Table Description Field	1	Project	On Schedule	8/6/2020	9/4/2020	25%	Michelle Schenk	Registrar	Sue Lau	On Schedule
Admissions File Review BPR Outcomes Implementation	1	Project	On Schedule	5/18/2020	9/30/2020	10%	Michelle Schenk	Admissions Office	Erin Heilmeier	On Schedule
Implement PeopleSoft CS FLUID Delegate Access	1	Project	On Schedule	2/5/2020	06/01/2021	50%	Margo Kammeyer	Information Technology Service	Todd Glick	On Schedule
Federal Work Study BPR Outcomes Implementation	1	Project	On Hold	2/1/2020	8/14/2020	85%	Adam Petrea	Student Employment	Dawn Chong	At Risk
Revise Room Allotment Reports - 2	1	Project	On Hold	1/1/2019	10/1/2020	65%	Adam Petrea	Registrar	Kathy Dean	At Risk
Electronic Transfer Credit Appeals	1	Project	On Hold	3/16/2020	12/31/2020	20%	Margo Kammeyer	Registrar	Rachel Schaeffer	At Risk
Preferred Name Usage for Faculty, Staff and Students	1	Project	Not Scheduled	1/10/2020	7/12/2020	0%	Adam Petrea	Registrar	Michelle Rable	Not Scheduled
Additional Data for Prospective Student Tracking in Slate	1	Project	Not Scheduled	4/2/2020	10/9/2020	0%	Richard Kasch	Admissions Office	Dustin Sabo	Not Scheduled
Create Financial Aid Reporting Environment - Phase 2	2	Project	Not Scheduled	7/2/2020	8/15/2021	0%	Gregory Brown	Financial Aid	Betsy Johnson	Not Scheduled
CCP Teacher Credential Materials in OnBase		Enhancement					Michelle Schenk	College Credit Plus Programs	Holly Cipriani	Not Scheduled
Add/Drop & Grade Change Form Updates		Enhancement					Chris Wammes	Registrar	Becky Cogswell	Not Scheduled
International Application - Student Birthplace to CSS from Slate		Enhancement					Todd Glick	Admissions Office	Dustin Sabo	Not Scheduled
Update Student Financial Aid Search Match		Enhancement					Todd Glick	Financial Aid	John Eggenton	Not Scheduled
Change CIP Year field on NSC interface		Enhancement					Todd Glick	Registrar	Sue Lau	Not Scheduled
Guest and Readmit Student Application Update		Enhancement					Todd Glick	Registrar	Michelle Rable	Not Scheduled
ACT Test Score Changes	1	Enhancement					Todd Glick	Admissions Office	Dustin Sabo	Not Scheduled
SAT Superscore Calculation	1	Enhancement					Todd Glick	Admissions Office	Erin Heilmeier	Not Scheduled

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:

Since the previous update, four projects and one enhancement have completed. Two new Enhancements have been added. Completed projects include several Dining Services additions to contactless meal pickup and mobile ordering for Starbucks and the Falcon's Nest. In addition, we have also integrated the electronic key system with housing data.

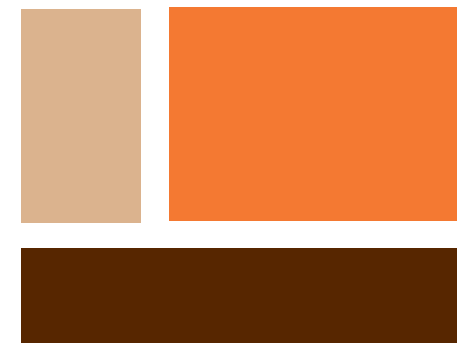
ESC Portfolio Sponsor: Sheri Stoll (Brad Leigh)

ITS Portfolio Manager: Mike Hachtel

BusOps/Auxiliary Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Sequoia and CBORD Reporting in the Web Report Library	2	Project	On Schedule	2/25/2020	9/25/2020	85%	Richard Kasch	Dining Services	Susan Reynolds	On Schedule/Scheduled
PageDNA Implementation	2	Project	On Schedule	3/23/2020	9/30/2020	75%	Margo Kammeyer	Postal Services	Jeremy VanTress	On Schedule/Scheduled
Upgrade Compliance Suite for OSHA Incidence Reporting	2	Project	Scheduled	1/14/2019	6/26/2020	5%	Andy Lynch	Business Operations	Kimberly Griner	On Schedule/Scheduled
Peoplesoft Integration into Hometown Ticketing	2	Project	On Hold			30%	Michelle Schenk	School of Art	Jason Walton	On Hold
Dining Services Process Review		Enhancement					Mike Hachtel	Dining Services	Susan Reynolds	Not Scheduled
Outfitters & Catering Mobile Solution Review		Enhancement					Renee Appelhans	Information Technology Service	Mike Hachtel	Not Scheduled
Update Info Pro with Latest Vendor Changes		Enhancement					Chris Wammes	Risk Management	Bess Huyghe	Not Scheduled
Cloud POS - EPOS teaching Kitchen implementation		Enhancement					Renee Appelhans	Dining Services	Jon Zachrich	Not Scheduled



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 been completed. One project has been added. The Evolve FM implementation project has been extended through the end of the year and a phase 2 has been added to work on reporting from the system. The Campus Ops Lean review is nearing completion and the findings will be presented later this month.

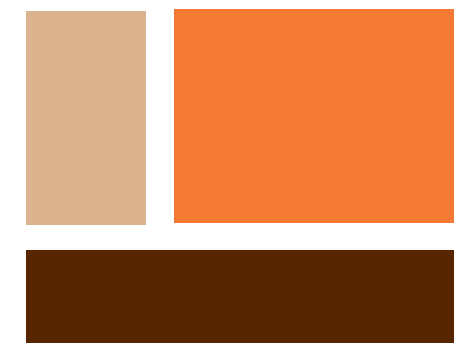
ESC Portfolio Sponsor: Sheri Stoll (April Smucker)

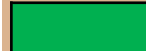




ITS Portfolio Manager: Mike Hachtel

Campus Operations, Planning, Design & Construction Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Campus Ops Work Processes Lean BPR	1	Project	On Schedule	4/13/2020	8/14/2020	95%	Margo Kammeyer	Campus Operations	Andrea Depinet	On Schedule/Scheduled
FalconPurch and TMA Data Transfer	1	Project	On Schedule	3/6/2020	10/31/2020	75%	Tim Parish	Energy Management	Erin Keegan	On Schedule/Scheduled
Evolve FM Implementation	1	Project	On Schedule	2/1/2020	12/31/2020	90%	Margo Kammeyer	Design & Construction	Daniel Lemmerbrock	On Schedule/Scheduled
Centralize Design & Construction's Project Materials in OnBase	1	Project	On Hold			95%	Michelle Schenk	Design & Construction	Emily Nungester	On Hold
Integrate ArcGIS interactive maps with OnBase	2	Project	Not Scheduled			0%	Chris Wammes	Design & Construction	Gabrielle Paxton	Not Scheduled
Evolve FM Implementation - Phase 2 (Reporting)	2	Project	Not Scheduled			0%	Gregory Brown	Design & Construction	Emily Nungester	Not Scheduled
Integrate Purchasing with Design & Construction OnBase Workflow	2	Project	On Hold			90%	Michelle Schenk	Design & Construction	Emily Nungester	On Hold
Key Module Load and Use in WebTMA		Enhancement					Alex Pilcher	Engineering	Mark Hester	Not Scheduled
WebTMA Vendor Supplied BPR		Enhancement					Alex Pilcher	Engineering	Mark Hester	Not Scheduled
BAS Struxureware Upgrade and New VM for Niagara N4		Enhancement					Alex Pilcher	Energy Management	Craig DeHart	Not Scheduled
Implement TMA Parts for Campus Operations		Enhancement					Alex Pilcher	Campus Services	Troy Spikes	Not Scheduled
Implement ShareBase		Enhancement					Michelle Schenk	Design & Construction	Emily Nungester	Not Scheduled
Onbase CAD Document Viewer Intergration		Enhancement					Bridget Place	Design & Construction	Emily Nungester	Not Scheduled



	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 GA Contracting BPR Process Updates (Policy Revision) project has been tested, updated, and retested (with the goal of going live mid-Sept), the OnBase Enhancements project has been assigned a new to PM to begin shortly, the Grad App Self-Service (Phase 2) project has almost been completed (pending one more Sponsor approval), and the Auto-push GMAT and GRE enhancement has been completed. The three “not scheduled” projects are awaiting functional and technical resources.

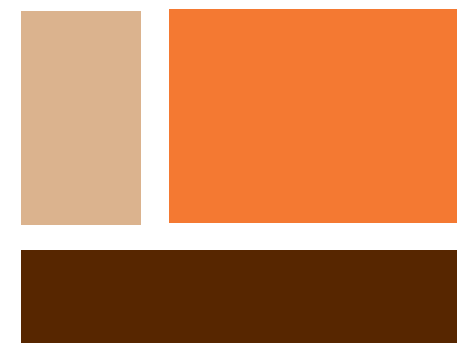
ESC Portfolio Sponsor: Simon Morgan-Russell / Alex Goberman

ITS Portfolio Manager: Adam Petrea

Graduate Education Portfolio Overview



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
GA Contracting BPR Process Updates	2	Project	On Schedule	2/18/2019	3/27/2020	80%	Margo Kammeyer	Graduate College	Michele Schmitz	On Schedule
Graduate College BPR Outcomes Implementation (Policy Revision)	1	Project	On Schedule	9/16/2019	8/31/2020	90%	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	95%	Richard Kasch	Marketing & Communications	Fred Connor	On Schedule
OnBase Enhancements for Graduate College - 5	2	Project	On Hold	8/13/2018	12/31/2020	55%	Tim Parish	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
Graduate Orientation Bridge Auto Enrollment	3	Project	Not Scheduled	7/6/2020	8/1/2020	0%	Sheri Thomas	Graduate Enrollment	Jennifer Sayre	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
Indiana Resident Graduate Enrollment Automation		Enhancement					Sue Tomor	Graduate Enrollment	Angela Cornelius	Not Scheduled
Graduate Curriculum EForm Changes		Enhancement					Clinton LaForest	Graduate College	Stephanie Boman	Not Scheduled
Grad Curriculum Enhancements		Enhancement					Chris Wammes	Graduate College	Stephanie Boman	Not Scheduled
GA Contracting App-Add student signature requirement logic.		Enhancement					Chris Wammes	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:

Projects in this Portfolio “On Hold” or “Not Scheduled” 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.

HCM Employee Self-Service & MyBGSU Fluid Update - On hold due to shortages in staff and other priorities.

Supplemental Pay Automation – Development is underway.

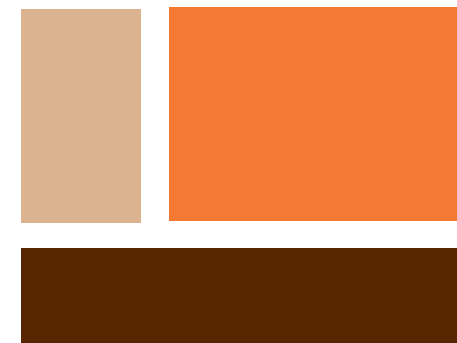
ESC Portfolio Sponsor: Viva McCarver

ITS Portfolio Manager: Todd Glick

Human Resources Portfolio Overview



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Supplemental Pay Automation	1	Project	On Schedule	5/1/2020	12/31/2020	30%	Tim Parish	Human Resources	Beth Rife	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
HCM Employee Self-Service & MyBGSU Fluid Update	1	Project	On Hold	2/5/2020	9/1/2020	35%	Margo Kammeyer	Information Technology Service	Todd Glick	On Hold
Adjunct Automation (OB to PS) and Grants Updates	2	Project	Not Scheduled	5/1/2020	12/31/2020	0%	Tim Parish	Human Resources	Beth Rife	Not Scheduled
Alternative Work Arrangement Form		Enhancement					Sue Tomor	Human Resources	Sandy Heck	On Hold
HR Remote Work Electronic Process		Enhancement					Chris Wammes	Human Resources	Bonnie Harrell	On Hold



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

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:

Since the last update, four projects were completed including: PeopleSoft Web Clock, Life Readiness Technology, Room Scheduling for Maurer Center Conference Rooms, and WebCAPE 2.0 upgrade. The Federal Work Study BPR Outcomes Implementation project was started. The Nursing Program Medical Simulation ITS Implementation project was added but not yet started. Three enhancements were completed, three were cancelled, and three new enhancements were added during the 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
Experiential Learning Management Tool	1	Project	On Schedule	2/21/2019	11/30/2020	30%	Tim Parish	V Prov Undergraduate Programs	Sheila Roberts		
Enhance Controls on Instructor Class Assignments	1	Project	On Schedule	3/10/2020	12/6/2020	60%	Sue Tomor	Registrar	Michelle Rable		
Unicheck Pilot	1	Project	On Schedule	7/6/2020	1/29/2021	25%	Donald Schumacher	Information Technology Service	John Ellinger		
EAB APS - Ongoing ITS Support	1	Project	On Schedule	9/9/2019	3/31/2021	45%	Sue Tomor	Office of the Provost	Brigette Gibson		
Federal Work Study BPR Outcomes Implementation	1	Project	On Hold	2/1/2020	8/14/2020	85%	Adam Petrea	Student Employment	Dawn Chong		
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		
Honors College Business Process Review	2	Project	Not Scheduled	5/1/2020	12/31/2020	0%	Sheri Thomas	Honors College	Jodi Lambdin Devine		
Nursing Program Medical Simulation ITS Implementation	1	Project	Not Scheduled	9/2/2020	7/1/2021	0%	Adam Petrea	School of Nursing	Shelly Bussard		
Ezproxy Upgrade to 7.0.16		Enhancement					Michelle Schenk	University Libraries	Mark Strang		
Minecraft EDU Initiative		Enhancement					Adam Petrea	School of Teaching & Learning	Mark Stevens		
University Libraries Supply Request		Enhancement					Richard Kasch	University Libraries	Jaime Spradlin		
Special Collection Invoice Request Form		Enhancement					Richard Kasch	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
Smartsheets Implementation		Enhancement						Adam Petrea	Office of the Provost	Davina Millin	
Flight Center Schedule Solution		Enhancement						Adam Arthur	Flight Instruction	Bryan Combs	
Update ACT/SAT Calculation in Online Math Placement		Enhancement						Chris Wammes	Math and Statistics Dept	Craig L. Zirbel	
Mobius 2020 / Canvas LTI		Enhancement						Scott Blackwood	Biological Science	Paul Moore	
xyBooks Canvas LTI		Enhancement						Scott Blackwood	Computer Science	Joseph Chao	
Stackable eCampus Cert Tracking Report		Enhancement						Gregory Brown	On-Line & Summer Acad Progs	Betsy Winters	
Data Warehouse - New eCampus Dashboard		Enhancement						Gregory Brown	On-Line & Summer Acad Progs	Paul Cesarini	
Add additional instructor info to the Data Warehouse on Class Section Term		Enhancement						Theresa Sherwood	A&S Dean	Dale Klopfer	
Graduation Rate Report Biology/A&S		Enhancement						Gregory Brown	A&S Dean	Marcus Sherrell	
Create Learning Community Reports in Falcon Info		Enhancement						Gregory Brown	V Prov Undergraduate Programs	Brett Holden	
SES Adobe Sign and OnBase Integration		Enhancement						Chris Wammes	Student Employment	Dawn Chong	

	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, four projects have completed and one enhancement has been added. Included in the completed projects were several COVID-19 reopening automation projects and the implementation of a mobile parking app.

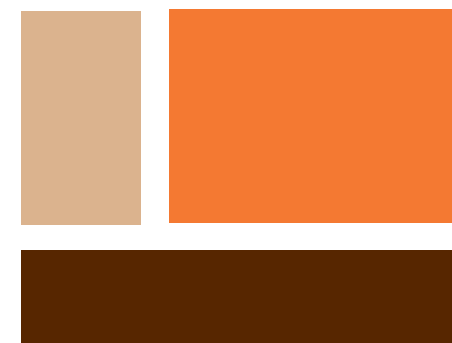
ESC Portfolio Sponsor: Sheri Stoll (Mike Campbell)

ITS Portfolio Manager: Mike Hachtel

Public Safety Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Security Camera Install - Courtyard Extension Lot A and G		Enhancement					Michael Firsdon	Police Division	John Stewart	



	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:

Since the previous update, one project to prepare BGSU for Fall COVID-19 reopening has completed. No additional project or enhancements have been added. The OSPR Business Process Review remains 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, three enhancements have been approved. Two projects have completed, including a new module in the housing system that assisted in scheduling move-in and a project to share housing data with the personal entry device system. The project to implement the new student portal, Portal X, is progressing on schedule.

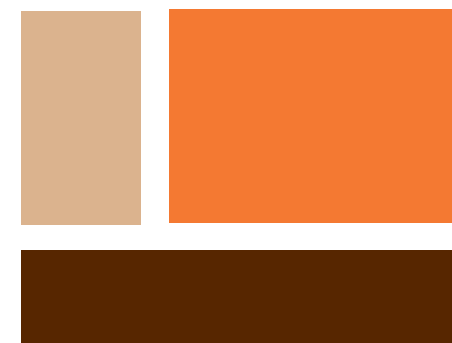
ESC Portfolio Sponsor: Jodi Webb

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	1	Project	On Schedule	5/1/2020	9/15/2020	75%	Margo Kammeyer	Office of Residence Life	Joshua Maxwell	On Schedule/Scheduled
PortalX Implementation	1	Project	On Schedule	3/16/2020	9/13/2020	70%	Margo Kammeyer	Office of Residence Life	Joshua Maxwell	On Schedule/Scheduled
KeyWatcher Technical Implementation	2	Project	On Schedule	7/1/2020	8/21/2020	85%	Margo Kammeyer	Campus Activities	Brian Heilmeier	On Schedule/Scheduled
Add Navigate Card to the "Home" page within MyBGSU		Enhancement					Chris Wammes	Office of Student Retention	Jaclyn Calderon	On Schedule/Scheduled
PortalX - StarRez - Removal of Last Run Date Field		Enhancement					Margo Kammeyer	Office of Residence Life	Joshua Maxwell	On Schedule/Scheduled
PortalX Encryption of in-place files stored in server-side Amazon		Enhancement					Margo Kammeyer	Office of Residence Life	Md Rezwan Islam	On Schedule/Scheduled
UHC Student Insurance Enrollment File Updates		Enhancement					Todd Glick	Health Services	Marlene Reynolds	On Schedule/Scheduled



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 with a hold on the portion of the project for the interface with PeopleSoft. Since the previous update, we have continued to review potential future solutions for the Recreation and Wellness application. One enhancement has been added to this portfolio.

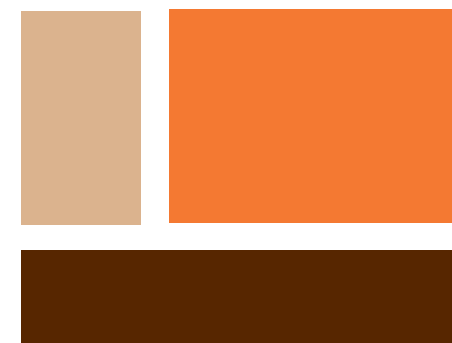
ESC Portfolio Sponsor: Bob Moosbrugger

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	50%	Tim Parish	Intercollegiate Athletics	James Elsasser	
Falcon Club Implementation	1	Project	Not Scheduled			0%	Tim Parish	Information Technology Service	John Ellinger	
TeamWorks Automation for Athletics - 6	2	Project	On Hold			35%	Michelle Schenk	Intercollegiate Athletics	Chet Hesson	
RecWell System RFP	2	RFP	Not Scheduled			0%	Adam Petrea	Recreation and Wellness	Stephen Kampf	
Highmark Interactive - SSO/DUO Implementation		Enhancement					Ted Fisher	Intercollegiate Athletics	Daniel Fischer	



	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 and one project have completed. No new projects nor enhancements have been added. Among the completed projects is an improvement to campaign coding, the addition of ApplePay for donor giving, and the migration of several donor pages to a more user friendly donor experience.

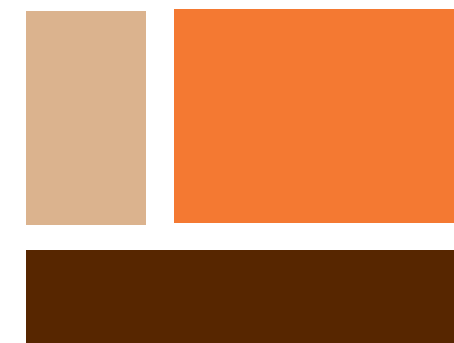
ESC Portfolio Sponsor: Pam Conlin

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 Schedule	7/8/2020	11/30/2020	30%	Mike Hachtel	V P University Advancement	Pamela Conlin	On Schedule/Scheduled
CDP (Contributor Development Partnership) Implementation	2	Project	On Schedule	1/13/2020	10/1/2020	75%	Tim Parish	WBGU-TV Television Service	Tina Simon	On Schedule/Scheduled
Upgrade Agilon Application to Current Version	2	Project	Scheduled	2/1/2021	4/22/2021	0%	Mike Hachtel	Development Office	Kyle Crawford	On Schedule/Scheduled
Falcon Club Young Alumni Gift Club		Enhancement	On Hold	2/1/2019	4/30/2019	0%	Donald Schumacher	Intercollegiate Athletics	Daniel Meyer	On Hold



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, one project and three enhancements have completed. One new project and two new enhancements have been approved. Projects and enhancements in this Portfolio are proceeding on schedule. The annual FMS Get Current project that brings the PeopleSoft Financials application up to date is in planning with a kickoff scheduled for later this month.

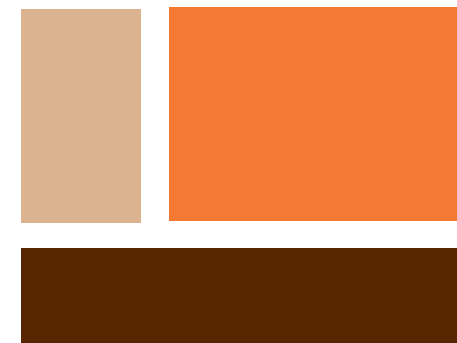
ESC Portfolio Sponsor: Sheri Stoll (Bob Swanson / Sharon Swartz)

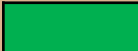




ITS Portfolio Manager: Mike Hachtel

Univ. Financials Portfolio Composition



Name	ESC Priority	Project Type	Status Name	Start	End	% Comp	Manager	Acct/Dept	Sponsor	Health
Academics Financials Reporting	1	Project	On Schedule	8/1/2018	10/31/2020	60%	Theresa Sherwood	Finance & Administration	Sherideen Stoll	On Schedule/Scheduled
Payroll Business Process Review	2	Project	On Schedule	4/13/2020	10/30/2020	25%	Michelle Schenk	Controller's Office	Rhonda Dicke	On Schedule/Scheduled
Timesheet Approval Exceptions Report	2	Project	On Schedule	3/9/2020	12/6/2020	5%	Andy Lynch	Internal Auditing	Lily Young	On Schedule/Scheduled
FMS Get Current 2021 & PT 8.58	2	Project	On Schedule	10/1/2020	2/7/2021	10%	Margo Kammeyer	Controller's Office	Bob Swanson	On Schedule/Scheduled
BPR - AP Voucher scans through OnBase	2	Project	Not Scheduled			0%	Sheri Thomas	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
PeopleSoft Personnel Action Forms Development	2	Project	On Hold			5%	Adam Petrea	Human Resources	Beth Rife	On Hold
Jaggaer Replacement - FMS Functionality Research		Enhancement					Mike Hachtel	Business Operations	Phillip Worley	On Schedule/Scheduled
Top 10 Proposals Enhancement		Enhancement					David Hoops	Sponsored Programs & Research	Alicia Swanson	On Schedule/Scheduled
Have Donor Reports in ODS pull from General Ledger Table		Enhancement					Carla Rinearson	Controller's Office	Vannon Heater	On Schedule/Scheduled
Changes to Journal Workflow for Grants		Enhancement					Adam Petrea	Controller's Office	Kate Behr	On Schedule/Scheduled
PUM 18 - 1098T 2020 Template		Enhancement					Todd Glick	Bursar's Office	Rhonda Montague	On Schedule/Scheduled



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

