

**University of Wisconsin – Madison  
Grants Project  
Monthly Status Report**

<b>Project</b>	<b>Reporting Period</b>	
University of Wisconsin – Madison Grants Project	February 1 – February 28, 2007	
<b>Phase</b>	<b>Project Manager</b>	<b>Technical Project Manager</b>
Development	Mark Sweet	Elise Barho

<b>Project Status Dashboard</b>			
<b>Assessment Category</b>	<b>Previous (green, yellow, red)</b>	<b>Current (green, yellow, red)</b>	<b>Rationale (issues, changes)</b>
<b>Overall Project Status</b>	<b>Green</b>	<b>Green</b>	
Environment	<b>Green</b>	<b>Green</b>	Development environment has been refreshed with additional testing data and configuration. Environment strategy has been discussed and initial approach agreed upon for future phases. Test and Conversion environments are scheduled for completion in early March.
Site Readiness	<b>Green</b>	<b>Green</b>	Communication with EXT and MIL campus remains appropriate for current phase.
Project Management	<b>Yellow</b>	<b>Yellow</b>	Progress on functional specifications has been as expected with several exceptions. Several designs will miss deadlines due to complexity and changes/additions in scope. These are being individual monitored and do not pose a great risk at this time
Project Coordination	<b>Yellow</b>	<b>Yellow</b>	Significant grant resources are being expended to support the program release at the expense of Grants specific tasks. Grants resources continue to be shared with Effort and LAST projects, as well as committing significant time to managing SIPs and
Training and Security	<b>Green</b>	<b>Green</b>	Met with DoIT security and have begun drafting PS security roles. New DoIT security lead has been assigned and draft of ITSP will be completed shortly.
Data Conversion	<b>Yellow</b>	<b>Yellow</b>	Continuing to work on data mapping for awards/projects and profiles, but slightly behind schedule. Conversion will be complex for all areas of the project.
Testing	<b>N/A</b>	<b>Green</b>	Unit testing of completed modifications is underway. Integrated testing will begin July 2007.
Budget	<b>Green</b>	<b>Green</b>	
Reporting	<b>Yellow</b>	<b>Yellow</b>	Reports have been re-prioritized and functional specifications are currently behind schedule.
Business Process Readiness	<b>Green</b>	<b>Green</b>	BPR sessions continuing. Documentation in process and in review.
<p>"Assessment" is rated in terms of a color code, where <b>Green</b> means 'no issues' or 'issues that are being addressed are under control'. <b>Yellow</b> means there is/are issue(s), current or emerging, which may impact the project if not addressed. <b>Red</b> means that there is an issue, current or emerging, which has impacted, or will impact, the project unless immediate management action is taken.</p>			

<b>Accomplishments For This Period</b>
<ul style="list-style-type: none"> <li>Completed 17 additional functional specifications in February and 89 total to date. Breakdown of remaining functional designs (1 PAI (newly added scope), 1 Pre-Award, 5 Data Conversion and 7 reporting (2 drafted and</li> </ul>

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<ul style="list-style-type: none"> <li>pending review).</li> <li>• 49 modifications and reports are currently in development and 14 items have been completed, but have not completed technical code review.</li> </ul>
<ul style="list-style-type: none"> <li>• Worked with Effort project to validate data model developed to capture committed effort information will work with the ECRT data model</li> </ul>
<ul style="list-style-type: none"> <li>• Provided JSC with information and estimates regarding project technical effort and potential contingency dates</li> </ul>
<ul style="list-style-type: none"> <li>• Completed mapping sessions for conversion of Sponsors and working on mapping of projects and awards</li> </ul>
<ul style="list-style-type: none"> <li>• Completed initial drafts for all four Alliance Conference presentations</li> </ul>
<ul style="list-style-type: none"> <li>• Completed initial draft of Sponsor data conversion functional specification</li> </ul>
<ul style="list-style-type: none"> <li>• Completed configuration meetings with MIL and EXT. In process of entering final values into GRGOLD.</li> </ul>
<ul style="list-style-type: none"> <li>•</li> </ul>

<b>Key Decisions</b>
<ul style="list-style-type: none"> <li>• Customers/Sponsors will be set up as business unit-specific SetIDs</li> <li>• Madison Budget Office and the Administrative Council have give approval to split Gifts and Non-Fed Grants into separate funds</li> <li>• The GoLive date has been set at MLK weekend January 2008</li> <li>• The Grants Reconciliation Dashboard will include data for MIL and EXT, in addition to the MSN business unit</li> <li>• Actual expenses will continue to be pulled from the General Ledger for WISDM reporting purposes, rather than Commitment Control or Projects</li> <li>• Project will convert projects at the same budget detail they currently have in ESIS. Most projects will be converted at the Direct/F&amp;A level while a few (mostly training grants) would be converted with the existing budget categories.</li> <li>• Cost sharing at a person level will not be captured at proposal stage</li> <li>• Milestones will NOT be entered and tracked within PS. More robust use of Milestone may be implemented after RSP and campus is more familiar with the functionality of PS Grants. The exception to this will be internal use of Milestones for interim/final financial reports or other Milestones related to billing and reporting. Entry of these Milestones will be used by RSP staff to manage their workload through the Milestone Reports.</li> <li>• The auto-number algorithm will be modified to automatically create project IDs that can easily be used in Legacy Payroll, which has resulted in an additional modification for the project.</li> <li>• Finalized format of auto-generated project IDs: PRJ##AA</li> </ul>

<b>Risks</b>
<ul style="list-style-type: none"> <li>• Strategic Administrative Projects and Strategic Interoperability Points not meeting MLK weekend January 2008 release date</li> <li>• Shared resource constraints across multiple projects and SIPs</li> <li>• Other Strategic Administrative Project and SIPs not ready for integrated testing</li> <li>• Cost Sharing bolt-on: this is large and complex</li> <li>• Data Conversion is complex and requires knowledge of multiple legacy systems and PS Grants functionality</li> </ul>

<b>High Priority Issues</b>
<ul style="list-style-type: none"> <li>• Finalize Program Release scope; obtain agreement from Sponsors, JPSC, Executive Committee on final scope of January 2008 release</li> <li>• Finalize direction on PCBU/ActivityID; develop functional and technical spec</li> <li>• Coordination with JPMC to ensure a successful integrated testing phase beginning July 2007</li> </ul>

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NOTE: the Joint Project Managers Committee is the group that is coordinating these strategic interoperability points (SIP) and cross project decisions (CPD)

<b>Relationship of Project to SIPs, CPDs, Other Projects</b>	
<b>Related SIP, CPD, or Project</b>	<b>Relationship Type</b>
<ul style="list-style-type: none"> <li>• LAST: Journal Upload, Edits, Cost Transfers</li> </ul>	<ul style="list-style-type: none"> <li>• These LAST projects must be completed in time for integrated testing</li> <li>• Met with LAST managers and staff to discuss project issues</li> <li>• The interface from the Journal Upload to SFS will include PCBU and Activity ID</li> <li>• PCBU and Activity ID will not be defaulted for online data entry</li> </ul>
<ul style="list-style-type: none"> <li>• Supply Chain</li> </ul>	<ul style="list-style-type: none"> <li>• The interface to SFS will include PCBU and Activity ID when a Project ID is used</li> </ul>
<ul style="list-style-type: none"> <li>• ATS</li> </ul>	<ul style="list-style-type: none"> <li>• Travel expenses posted to extramural projects must be integrated into Proj Resource for Grants billing</li> <li>• Budget check process must post to KK</li> </ul>
<ul style="list-style-type: none"> <li>• Non-Sponsored Projects SIP</li> </ul>	<ul style="list-style-type: none"> <li>• This effort is led by UWSA with participation from Grants and MSN Accounting Services</li> </ul>
<ul style="list-style-type: none"> <li>• Salary Cost Transfer SIP</li> </ul>	<ul style="list-style-type: none"> <li>• Analysis completed and determined that those SCTs done on the mainframe will be included in the JET tool</li> <li>• Estimates completed by SFS team</li> </ul>
<ul style="list-style-type: none"> <li>• Project Numbering SIP</li> </ul>	<ul style="list-style-type: none"> <li>• Final decision on format: PRJ##AA</li> <li>• Functional/technical spec completed</li> <li>• Ready for Unit Testing</li> </ul>
<ul style="list-style-type: none"> <li>• PC Business Unit &amp; Activity ID</li> </ul>	<ul style="list-style-type: none"> <li>• PCBU will be the same value as the GLBU</li> <li>• Interfaces to SFS will be modified to include the correct PCBU</li> <li>• Activity ID will not be included on interfaced transactions or during online entry</li> <li>• Grants, SFS, LAST, and Supply Chain must all make adjustments to manage these chartfields</li> <li>• Grants team: development of App Engine mod; functional spec undergoing final review before hand off to technical developers</li> <li>• SFS team: development of SFS Interface changes</li> </ul>