

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

<b>Project</b>		<b>Reporting Period</b>	
University of Wisconsin – Madison Grants Project		June 1 – July 31, 2006	
<b>Phase</b>	<b>Project Manager</b>	<b>Technical Project Manager</b>	
Fit Gap	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	Yellow	Green	Configuration issues have been resolved
Site Readiness	Green	Green	Good participation from partners during Fit-Gap sessions
Project Management	Green	Green	Operating as envisioned in project plan and project charter.
Project Coordination	Yellow	Yellow	Initial project coordination meeting 6/27/06; no inter project issues have been discussed at this point. Next meeting scheduled for 7/17. Grants PMO has volunteered for large volume of tasks.
Training and Security	Green	Green	Initial security discussions planned for Analysis Phase.
Data Conversion	N/A	Green	Teams have begun to discuss data conversion approach and team roles.
Testing	N/A	N/A	
Reporting	Green	Green	Reporting sessions progressing as planned; Overall Reporting Strategy currently being developed to help guide future activities
Business Process Readiness	Green	Green	Business Process sessions and activities progressing as planned. Additional participation in Fit-Gap sessions by RSP staff helped raise awareness of future state.
<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>
• Completed Current State documentation
• Created Current State Issues Summary document that summarizes all current states issues and will be used to track improvements over current state
• Completed Analyze Functionality work tasks and completed documentation of delivered PeopleSoft functionality to serve as basis for future documentation
• Drafted SFS and Grants Technical Architecture Strategy for review by UWSA and DOIT
• Drafted Technical Project Standards Handbook
• Drafted Technical Environment Strategy for all PeopleSoft Projects
• Executed Fit-Gap sessions June 12 – June 20
• Summarized Fit-Gap sessions in Detail Process Fit-Gap documents

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• Identified Fit-Gap follow-up sessions; scheduled and conducted ongoing sessions
• Draft Reporting Approach document circulated for comment
• Drafting Organizational Change Management plan. Will submit for Sponsor for review and approval prior to next meeting.
• Joint Project Managers Committee began meeting to discussion strategic interoperability points
• Implemented JIRA as the tracking log for all Issues, Risks, Decisions, SIPs, etc. This is a web-based tool that all members of the project team can use to monitor various activities related to the project.
• Established data conversion teams; began approach documentation
• Completed documenting project risks in Risk Register.
• Completed Quality Plan and submitted for sponsor review.
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<b>Key Milestones/Activity Status/Results</b>				
	<b>Milestone/Activity/Results</b>	<b>Planned</b>	<b>Forecast</b>	<b>Status</b>
1.	Finalize Current State Process Documentation	5/29/2006	6/02/2006	All documentation has been completed and will be available for team review by 6/2/06.
2.	Finalize Analyze Functionality Documents	6/09/2006	6/09/2006	All analyze functionality documents have been completed.
3.	Conducted Fit-Gap sessions	6/21/2006	6/21/2006	Completed.
4.	Finalize Fit Gap Documentation	7/24/2006	7/24/2006	All documentation updated following initial sessions. Additional updates may be required after analysis and follow-up sessions have been completed.
5.	Complete Fit Gap Phase	8/18/2006	8/18/2006	Working towards completing majority of phase tasks for all business processes. Certain additional analysis may be continue into Analysis Phase for SIPs and CPDs.
6.				
7.				
8.				
9.				
10.				

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

<b>Interaction with other Project (SIP/CPD)</b>			
	<b>Issue</b>	<b>SIP/CPD</b>	<b>Status</b>
1.			

<b>Immediate Visibility – Emergent Issues and Risks</b>				
	<b>Issue / Risk</b>	<b>Priority</b>	<b>Response</b>	<b>Action By</b>
2.	None at this time			

“Action By” person listed first has assigned responsibility. Second person assists / reviews and follow up.

<b>Ongoing – Issues and Risks</b>				
	<b>Issue / Risk</b>	<b>Impact</b>	<b>Consequence</b>	<b>Action By</b>
1.	Data Conversion - Impact of Grants	Major		Mark Sweet

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	conversion on other systems			
2.	Data Conversion - Develop Approach for determination of use specialized fields	Major		Elise Barho
3.	Cost Sharing	Major		Doug Tilghman
4.	Cost Overruns	Major		Doug Tilghman
5.	Control and Monitoring of Project Budget and Expenditures	Major		Doug Tilghman
6.	Cost Transfers	Major		Doug Tilghman
7.	Letter of Credit Management	Major		Ryan McHugh
8.	Cash Management	Major		Ryan McHugh
9.	Accuracy and Timeliness of Reporting	Major		Lourdie Fabien
10.	Effort Project Impact on Grants Resources	Major		Elise Barho
11.	SFS Change Control Process Not Defined	Major		Elise Barho
12.	GM_GMFACS process is not producing entries	Major		Doug Tilghman
13.	Auto Numbering Function for Customer ID is not working as intended	Major		David J. Ruhde

“Action By” person listed first has assigned responsibility. Second person assists / reviews and follow up.

**Issue Log Statistics:**

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OPEN PeopleSoft Cases			
PeopleSoft Case #	Status	Description	Date Created
		None at this time	

Decision Log	
Decision	Description
How to handle non-Cumulative Billing? (3.02)	How to handle non-Cumulative Billing? How to segment billing for individual years (most common on federal awards)? Option Paper may be necessary here to outline the pros and cons. Huron already has something similar to an options doc that can be tailored to UW. Recommend to Project ID or Activity ID, but budget reference is also an option (but

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<b>Decision Log</b>	
<b>Decision</b>	<b>Description</b>
	requires more system modifications to be able to bill).
Which system will we be using for pre-award functions? PALS or PeopleSoft.	We need to decide which system to use for the entry of all pre-award items - proposals, agreements, negotiations, etc. We need to decide whether or not to keep PALS or replace all PALS functionality with PeopleSoft.
Where and how will the E-T-Form be developed?	A decision needs to be made on how the E-T-form is to be developed, and on what system.
Posted transactions vs. non-posted transactions	Posted transactions vs. non-posted transactions (i.e. future budget information). Which set of transactions will be integrated into the datamart? sactions vs. non-posted transactions
How will cost share be entered and tracked in PeopleSoft?	How will cost share be entered and tracked in PeopleSoft? For the purpose of reporting, cost share process must be identified in order to identify the cost share and waived cost share reports needed in PeopleSoft. opened 6/21/06
Fund codes needed for Regents reporting but are considered non-sponsored projects.	Regent report details funding information for funds: 133, 134, 135, 144, 145, 146, 147, 148, 161, 162, and 533. Funds 147, 162, 183, and 533 are non-sponsored and are not in scope for Grants project. How will UW deal with such funds that are required for Regent reporting but are considered non-sponsored projects?
How many years of inactive ESIS award information will be converted into PeopleSoft?	There exists a need to report on inactive ESIS award information for Regent reports. How many years of inactive ESIS award information will be converted into PeopleSoft? opened 6/21/06