

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

Project		Reporting Period	
University of Wisconsin – Madison Grants Project		October 1, 2006 – October 31, 2006	
Phase	Project Manager	Technical Project Manager	
Analysis	Mark Sweet	Elise Barho	

Project Status Dashboard			
Assessment Category	Previous (green, yellow, red)	Current (green, yellow, red)	Rationale (issues, changes)
Overall Project Status			
Environment	Green	Green	New GRGOLD environment has been created and is configured. Development environment is in progress and refresh schedule has been established.
Site Readiness	Green	Green	Continued involvement from all constituents in follow up and analysis meetings. Conducted numerous reviews with MSN Business Services, MIL, EXT, and UWSA. Conversion will be next large task.
Project Management	Green	Green	Operating as envisioned in project plan and project charter. Several non-critical project tasks remain open.
Project Coordination	Yellow	Yellow	JPMC and JPMS have been established, but progress on issues remains slow. Additional coordination needed with campus groups and PIs. Largest project risks reside in this area.
Training and Security	Green	Green	Conducted initial project security discussion and set-up regular meetings with DoIT security team.
Data Conversion	Green	Green	Strategy completed, pending PMO and sponsor approval. Initial legacy data mapping underway.
Testing	N/A	N/A	Grants Project has begun a more direct communication approach regarding the need for all UW Strategic Administrative Projects to be able to test in an integrated environment in July 2007.
Reporting	Yellow	Green	Reporting sessions progressing as planned; All components of reporting solution have been estimated. How best to involve PIs remains an open issue.
Business Process Readiness	Green	Green	Business Process Redesign sessions currently being planned in concert with configuration activities. These sessions will be led by the RSP team members.

“Assessment” is rated in terms of a color code, where **Green** means ‘no issues’ or ‘issues that are being addressed are under control’. **Yellow** means there is/are issue(s), current or emerging, which may impact the project if not addressed. **Red** means that there is an issue, current or emerging, which has impacted, or will impact, the project unless immediate management action is taken.

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Accomplishments For This Period
• Completed all estimation session for required modifications
• Prepared Development Request. Discussed with project sponsors for approval
• Finalized Business Process Review documentation template
• Finalized Functional specification template
• Finalized Technical specification template
• Fully participated in all JPMC discussions and meetings, completing all required documentation requests
• Continued meeting with Campus Reporting group to define and document end user reporting requirements
• Continued updating existing system documentation for conversion activities
• Finalized Reporting Strategy and distributed to Sponsors for review
• Finalized Conversion Strategy and distributed to Sponsors for review
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Key Milestones/Activity Status/Results				
	Milestone/Activity/Results	Planned	Forecast	Status
1.	Reporting Strategy	10/13/06		Complete
2.	Conversion Strategy	10/02/06		Complete
3.	Development Request	9/29/06		Complete
4.	Updated Project Plan	10/13/06	11/10/06	In Progress
5.	Updated Risk Plan	10/13/06	11/10/06	In Progress
6.				
7.				
8.				
9.				

Immediate Visibility – Emergent Issues and Risks				
	Issue / Risk	Priority	Response	Action By
1.				

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

Ongoing – Issues and Risks				
	Issue / Risk	Impact	Consequence	Action By
1.	Ownership and Involvement	Medium	Clear ownership lines are not obvious. Many areas overlap and have multiple constituents.	Mark Sweet
2.	Effective Communication	Medium	Commitment to prepare all research-related constituencies for system changes by actively communicating prior to and throughout the implementation.	Mark Sweet
3.	Multiple Concurrent System Implementations	High	Our project is dependant on the actions of several SIPs including the Chartfields, Edits and IAA.	Elise Barho
4.	Cost Sharing	Medium	Compliance risks for university and impact to effort reporting	Jason Moebius

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			project.	
5.	Business Process Change		Willingness to change business processes when necessary in order to minimize customizations	Mark Sweet
6.	Data Conversion	High	Continued focus on the complexity of this project area. Additional technical resources assigned and standing meetings planned.	Elise Barho
7.				
8.				
9.				
10.				

“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

Decision Log	
Decision	Description
Extension needs to finalize the decision of if they plan to use Grants Billing for sponsored projects.	Extension will still have to use billing sperately for non-sponsored tranactions, EXT leadership has made the decision to proceed with using the Grants suite functionality to managed sponsored projects
CALS and Grad School Will Use GM for their projects	Mark Sweet confirmed that Grad School and CALS (AG) will use Grants Management Sponsored proeject functionality for all their projects.
F&A Allocation Frequency	A decision must be made on how frequently the F&A allocation process will be run. The timing of the F&A allocation process may affect when other processes run.
Decision to use PALS	The project has decided to utilize two bolt-on modifications to replace and enhance existing PALS functionality. This development has been approved as part of the development request.