University of Wisconsin – Madison Grants Project
Executive Committee Meeting
Project Status as of December 20, 2006

Project Reporting Period
University of Wisconsin – Madison Grants Project September 1, 2006 – December 20, 2006

Phase(s) Covered Project Manager Technical Project Manager
Analysis, Design/Development Mark Sweet Elise Barho

Project Sponsors
Kim Moreland, Steve Hahn, Jack Duwe

Project Timeline

Timeline/ Schedule
Project is progressing in line with overall project timeline. Several project tasks, such as security definition and process redesign have been rescheduled in the plan to better fit project resource availability.

Work Effort and Resources
Project resources have been stretched across multiple strategic projects, as well as existing operational requirements, which has made allocating project tasks challenging.

Scope
Project scope must be finalized in several key areas, mostly related to key interoperability points and conversion.

Open Issues
Primarily focused on cross project issues, which have been identified and are being addressed through the Joint Project Manager Committee (JPMC).

Risks
Project Risks have been documented and mitigation strategies developed. Currently monitored using the JIRA tracking tool.

Budget
Currently within tolerances and projected costs are trending in line with budget.
### Key Accomplishments – Analysis and Design Phases

- Completed design and development estimates and reviewed with project sponsors
- Identified over 160 functional software gaps for over 30 business processes
- Conducted several iterations of analysis sessions to determine approach for dealing with system gaps, including 73 potential modifications, 49 of which were recommended for development by the PMO and Sponsors. Remaining gaps will be addressed with business process changes, configuration, security settings, or reporting.
- Identified over 230 existing and delivered reports for analysis related to RSP, department, division, Graduate School, System and University business processes
- Completed several rounds of thorough review of each report and identified 98 for development or modification, with the majority being developed in PeopleSoft query to reduce development effort
- Submitted list of approved system modifications to SFS Executive Team for Approval – Approved Dec 12, 2006
- Updated Project Management documentation to reflect scope approved during analysis phase
- Functional and Technical Specifications under development for approved modifications and reports (over 35 functional specifications completed to date)
- Completed data conversion project plan and continuing with data mapping, scope definition and legacy data analysis activities. Additional project resources have been added in this area.
- Updated project documentation to include all design and development activities
- Conducting RSP-lead business process redesign sessions to better align processes with system functionality. Currently developing documentation prior to final round of design sessions.
- Created GRGOLD environment to capture final configuration values. Working with MSN, MIL, EXT to identify proper configuration values. DoIT has begun development of migration tool to significantly reduce build time of new environments by automating the configuration process.
- Conducted initial meeting with DoIT security group to establish working group to begin construction of Grants security infrastructure
- Established standing meetings with LAST, AP/PO and Travel projects to discuss cross project issues.
- Conducting monthly constituents meeting with leadership from UWSA, Madison Business Services, DoIT, Graduate School, CALS, EXT, and MIL to provide project status and review key project decisions.

### Key Decisions

- Grants will develop a modification to the delivered project numbering functionality that will use alpha characters for the last four digits of the project ID to support current payroll processing. Modifications to the inbound and outbound payroll interfaces will still be required.
- Grants will default the Activity ID to 01 on all transactions and use multiple project IDs on non-cumulative grants to avoid forcing additional change on inbound auxiliary systems and outbound shadow systems
- Grants will develop a bolt on application to capture and calculate cost share for grants. This bolt on will be reviewed by the College and School Administrators as well as the Administrative Council.

### High Priority Issues

- Interactions with other large strategic projects: The Grants project has several very close interdependencies with other important projects on campus and delays in those projects could adversely affect both the timeline and budget of the Grants Project. Examples:
  - LAST
  - 8.9 Upgrade
- Requests received to increase the level of interactions with specific constituencies, AC/Departments and Principal Investigator, have been voiced.
  - Mitigation plan has been enacted, which includes developing working group within AC to review Grants issues and the development of a group of departmental representatives to work on Campus Reporting needs.
- The Grants project is dependant on other strategic projects meeting the agreed upon July 2007 deadline for integrated Testing
## Upcoming Tasks - Design Phase

- Complete development of functional specification, technical specification, and programming for necessary modifications
- Complete development of functional specifications, technical specifications, and programming for approved reports
- Complete technical and functional unit test of all modifications, reports and interfaces
- Complete migration of all modifications, reports, and interfaces to Integrated Testing environment
- Conduct Business Process Redesign sessions and complete process documentation
- Complete data conversion legacy system analysis and data mapping activities
- Create data conversion work environment and begin manual data collection activities
- Complete data conversion program functional and technical specifications
- Work with DoIT security group to document and implement initial grants security infrastructure
- Complete Configuration for MSN, MIL and EXT Business Units

## Attachments

- Development Request
- Example Business Process Redesign Documentation
- Interdependencies with other Strategic Administrative Projects