

## Project Portfolio Executive Summary for May 2016

### UW Enterprise Projects

Projects - Red	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
<b>HR/Payroll Modernization</b>	Kelli Trosvig Mindy Kornberg Cheryl Cameron Lori Mitchell Paul Jenny Dave Anderson	3 - OCIO	<b>Red</b>	18	5	5	3	5	\$37,949,821	\$67,464,473
<p><b>Project Status:</b> The Human Resources/Payroll Modernization program has made significant headway since its reset late in 2015. The program, which has been evaluated extensively by outside experts over the last eight months, has undergone major changes in leadership, planning, and organizational structure. While the program will not go live in June 2016, it has made great strides in conducting a new design review, designing an integrated service center and reaching a variety of other milestones.</p> <p><b>An Integrated Service Center:</b> Based on recommendations from evaluators and best practices among other Workday higher education customers, the program is now developing a new Integrated Service Center (ISC) to provide support to the UW community once the system goes live. The new service center will bring together functions from Academic Personnel, Human Resources, Payroll and UW Information Technology. The initial detailed design on the ISC has been completed and received support from key business owners.</p> <p><b>May Regents Decision:</b> On May 12, the Program will go before the UW Board of Regents to seek a revised schedule and funding. The Board of Regents agenda and briefing materials provided by the program can be found at <a href="#">this link</a> after Friday, May 6 at noon.</p> <p><b>2016 Milestones:</b> The HR/P Modernization program made significant progress in 2016.</p> <ul style="list-style-type: none"> <li>• Intensive work has produced new foundational, cross-functional key concepts, strategies, and a number of future state business process designs, all of which form the basis for subsequent design work.</li> <li>• The first cycle of parallel payroll testing is complete, setting the foundation for subsequent and repeated testing, which will be the best indication that payroll will be accurate at go-live.</li> <li>• An initial detailed design for an Integrated Service Center to support the new workflows and operating model is complete and has been reviewed and approved by all business owners in the program.</li> <li>• The program has just completed an in-depth orientation to its key concepts, strategies, and some future state business process designs for more than 130 program staff, business owners and key stakeholders, a foundation that will prepare this group to validate the design.</li> </ul>										

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Projects - Green	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
<b>Transportation System Improvement Project</b>	Charles Kennedy	1 - UW	Green	9	2	2	2	3	\$1,128,467	\$1,440,200
<p><b>Project Status:</b> Schedule: Phase 1a is complete. Phase 1b, Triangle is on schedule for completion during June. Phase 2 is on schedule for completion in July.</p> <p>Risks: Senior Computer Specialist position is still not filled. Transportation move from its offices and the move of existing servers required staff time that would have otherwise been devoted to this project. Though it is not expected to impact the schedule for Phase 1b and Phase 2, it has put stress on the supporting staff. We are continuing to look at our staffing to mitigate the under staffing situation.</p>										

## Project Portfolio Executive Summary for May 2016

### UW Medicine Projects

Projects - Yellow	Sponsor	Oversight Level *	Project Health **	Overall Risk Rating ***	Budget Rating	Schedule Rating	Scope Rating	Issues Rating	Actual Cost (Project Life)	Budget (Project Life)
<b>Pharmacy Inventory Management System</b>	Shabir Somani	2 - UW	Yellow	10	2	2	2	4	\$1,848,842	\$6,941,089

**Project Status:** The Pharmacy Inventory Management System (PIMS) project is in the Planning and Analysis phase and currently undergoing a project reset. UW Medicine and TECSYS (system vendor) are working towards confirming and finalizing project scope, timeline, and resources.

Current major activities include:

- Revised investment plan to be approved by VP UW-IT/CIO.
- Completed signoff between UWM and TECSYS on Solution Requirements and Design (v16).
- Development of master project plan that is resource based and determines the implementation schedule.
- Recommence UWM Pharmacy Operations Workgroup.
- Completion of Golden Database copy (Elite v9.2) and Elite 9.2 Proof of Concept Build (Items, Vendors, Customer, and Location).
- Continued UW Medicine participation in TECSYS R&D deep dive and review sessions.
- Continued interface mapping efforts between TECSYS Elite system and UWM EHRs, BD Pyxis, and Pharmacy Vendors.
- Continued engagement of ongoing external QA consultants. Closed X4 external QA findings.
- Transitioned project management from Susan Nevius to Marty McCarrel (UWM) and from Mike Krga to Marlon Bundang (TECSYS).
- Identification and acquisition of resources.

Upcoming major milestones include:

- Planning & Analysis Phase Complete – Target 5/31/16
- Tecsyes 9.4 Code Released (includes UWM Q1 2016 requirements) – Target 6/7/16
- Project Kickoff – Target 6/8/16

Major Risks/Issues:

- Issue – Two product defects discovered in POC build out. TECSYS researching.
- Risk – BD Pyxis interface dependent on CCE engine migration. Mitigation – CCE engine project in Testing Phase.
- Risk – New solution: Although TECSYS has health system industry experience and the solution is highly integrated, specific pharmacy operations components are new to them. Mitigation - planning for extensive testing of the new Elite software solution as well as integrated testing with the UW Medicine systems across the five entities.
- Risk – Budget and UW Medicine Resource availability: Funding and availability of additional UW Medicine resources (Operational, IT Services, and External) may have schedule impacts. Mitigation – detailed project planning.

Note budget, schedule, and scope are considered tracking "on plan" as we are re-baselining the project as part of the project reset in our attempts to get it out of planning.

## Project Portfolio Executive Summary for May 2016

Projects – Complete	Sponsor	Oversight Level *	Monitor of Benefits/Value Realized
<b>Epic Enterprise Specialty Implementation:</b> Project went live 5/20/14	Johnese Spisso James Fine	1 - UW	

* Oversight Level Key	
1	Overseen by UW management and staff. Requires OCIO approval and reporting if over delegated authority.
2	OCIO approval required and regular project reporting. Quality Assurance (QA) reporting required, maybe internal or external. OCIO may recommend project to be full Technology Services Board (TSB) oversight.
3	High severity and/or high risk, subject to full TSB oversight, which includes TSB approval, written reports to the TSB, periodic status reports to the TSB by the agency director and staff, and submission of other reports as directed by the TSB. External QA reporting required.

** Project Health Key	
<b>Green</b>	Project is on time, on budget, and within defined scope. <b>Overall Risk Rating where 4-9 is Green.</b>
<b>Yellow</b>	Changes to scope, budget, or resources have placed project at some risk. Project has the potential for delays or scope changes. <b>Overall Risk Rating where 10-14 is Yellow.</b>
<b>Red</b>	Major changes to scope, budget or resources have placed project at critical risk. One or more of the following must change in order to proceed: project schedule, resources, budget, scope. <b>Overall Risk Rating where 15-20 is Red.</b>

**Note for UW Medicine:** project oversight levels 2 & 3 report to UW management

*** IT Project Risk Ratings	
Current Risk Rating	Use the scale below to rate current performance on <b>Budget, Schedule</b> and <b>Scope</b> (select appropriate number for each)
Budget =	1 = Performing better than project plan; ahead by 5% or more 2 = Performance is on plan
Schedule =	3 = Behind plan, but within 5% of original targets 4 = Behind plan between 6% to 10% and likely to use/using contingency
Scope =	5 = Greater than 10% behind plan and more than half of contingency used
Current Risk Rating	Use the scale below to rate current impact of <b>Issues</b> and other factors relevant to the project (select one number for this measure)
Issues =	1 = No risks or issues identified at this time 2 = Some identified but minor, no impacts anticipated 3 = Some that could impact the project are being managed, with minimal impact anticipated 4 = Significant risks/issues/other factors identified but not yet managed 5 = Risks/issues being managed but will have significant impact (greater than 10%) on project budget, schedule and/or scope