



IT PROFESSIONALS CONFERENCE 2018

Brought to you by and for IT Professionals at UW-Madison

IT Project Intake Process

Enabling Collaboration

May 31, 2018

Agenda

- Welcome and Introductions
- Process Overview
- Submission Process
- Review/Approval Process
- Supplemental Information
- Statistics and Impacts
- Q & A



Presenters

Name	Title	Campus Group
Alan Silver	IT Manager	Department of Chemistry, L & S
Dawn McCauley	Executive Director	IT Center of Excellence, CIO Office
Sabrina Messer	Portfolio Manager	Enterprise Internet Services, DoIT
Steve Devoti	Enterprise Architect	IT Center of Excellence, CIO Office

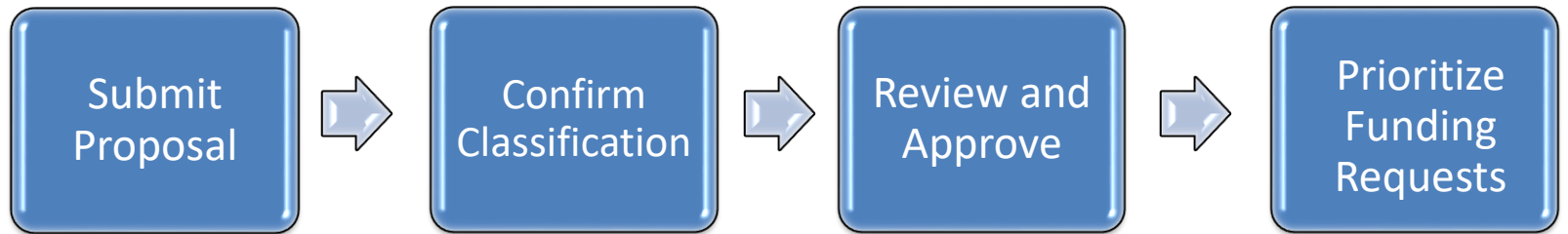


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IT Project Intake Process



Agenda

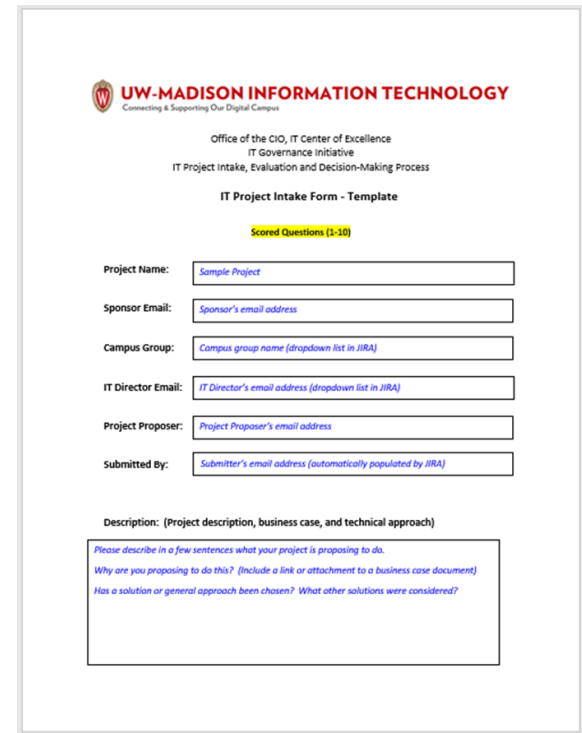
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Intake Form

➤ Intake Form includes:

- Project Name and Description
- Contact Info
- Reasons for the Project
- Service Catalog Info
- Cost and Effort Estimates
- Scope Information



The screenshot displays the 'IT Project Intake Form - Template' from UW-Madison Information Technology. At the top, it features the UW-Madison logo and the text 'UW-MADISON INFORMATION TECHNOLOGY' with the tagline 'Connecting & Supporting Our Digital Campus'. Below this, it identifies the 'Office of the CIO, IT Center of Excellence' and the 'IT Governance Initiative'. The form's purpose is 'IT Project Intake, Evaluation and Decision-Making Process'. A section titled 'IT Project Intake Form - Template' contains a 'Scored Questions (1-10)' section. This section includes several input fields: 'Project Name' (with 'Sample Project' as a placeholder), 'Sponsor Email' (with 'Sponsor's email address' as a placeholder), 'Campus Group' (with 'Campus group name (dropdown list in JIRA)' as a placeholder), 'IT Director Email' (with 'IT Director's email address (dropdown list in JIRA)' as a placeholder), 'Project Proposer' (with 'Project Proposer's email address' as a placeholder), and 'Submitted By' (with 'Submitter's email address (automatically populated by JIRA)' as a placeholder). Below these fields is a 'Description' section with the heading '(Project description, business case, and technical approach)'. It contains a text area with the prompt: 'Please describe in a few sentences what your project is proposing to do. Why are you proposing to do this? (Include a link or attachment to a business case document) Has a solution or general approach been chosen? What other solutions were considered?'



Scoring Matrix

Project Name: Sample Project						
UW-Madison Project Classification - Impact Assessment						
Risk Factors To Consider	Low Impact (1)	Medium (3)	High Impact (5)	Rating	Weight	Score
Implementing a service similar to one in the Service Catalog or in the Project Portfolio?	No		Yes	5	5	25
New service could be used by other campus units?	No		Yes	5	5	25
Estimated total IT cost to implement?	Less than \$100,000	\$100,000 to \$499,999	\$500,000 or more	5	5	25
Estimated hours of UW-Madison IT staff time to implement?	Less than 500 hours	500 to 4,999 hours	5,000 hours or more	5	3	15
Total IT cost to operate/maintain the solution for the first three years?	Less than \$100,000	\$100,000 to \$499,999	\$500,000 or more	5	3	15
Is the project fully funded?	Yes		No	5	3	15
Increase capacity of existing UW-Madison infrastructure?	No		Yes	5	3	15
Scope of project impact?	Department/divisional	Two or more divisions	Campus-wide/UW System	5	3	15
Roles of end users/consumers impacted?	Department staff, faculty/instructors only	Divisional staff, faculty/instructors, limited students or external partners	Large campus-wide faculty/instructors, staff, students, or the public	5	1	5
Total number of people directly or indirectly affected by the solution	Less than 1,000	1,000 to 9,999	10,000 or more	5	3	15
Overall Score						170
Low Impact	(34-99)	Project Classification: High Impact				
Medium Impact	(100 - 139)					
High Impact	(140 - 170)					



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Initial Review of Proposals

- **An Initial Review group reviews incoming proposals**
 - IT Center of Excellence
 - TAG Chairs
- **Initial review focuses on the following**
 - Confirmation of Project Classification
 - Identify any “flags” for additional review
 - Determine which TAGs need to review the proposal
- **Low Impact proposals without “flags”**
 - Review process is complete and projects are approved



Cross-TAG Review of Proposals

➤ Medium/High Impact proposals

- *Additional information on “flags” gathered and reviewed*
 - Other IT services considered
 - Additional scope info (e.g.: shared solution, compliance)
 - More detailed cost breakdown
 - More detailed central funding request
 - Impacts to campus IT infrastructure

- *Cross-TAG Review Group*
 - IT Center of Excellence
 - TAG members
 - Subject-Matter Experts (SMEs), as necessary
 - Proposers/Project Sponsors



Approval Process

➤ Review and Approval

- *Low Impact Proposals*
 - Initial review and approved (if no “flags”)
 - Estimated 5 days to approval

- *Medium and High Impact Proposals*
 - Requires additional information
 - Routed to Cross-TAG Review Group
 - Estimated 30-60 days to approval

- *Central Funding Requests*
 - Routed to ITSC for approval and prioritization
 - Three funding approval dates (Jan, May, Sept)



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Supplemental Info for Medium/High Impact

- Supplemental information gathered
 - Similar IT Services
 - Scope of the implementation
 - Detailed estimated costs
 - Central funding requested
 - Impact on IT infrastructure



Research Approach

- Help identify similar services across campus
- Facilitate the creation of a solution that meets the needs of multiple areas (get interested parties together)
- Provide guidance on non-functional requirements
- Security, IAM, data integrations (avoid pitfalls)
- Help with the creation of RFPs/RFIs if necessary
- Identify and bring SME's into the conversation if necessary
- Provide information on, and assess the impact on the infrastructure
- Participate in discussions with vendors
- Goal is to help...Not slow things down



IT Resources for Consultation

- UW Data Governance (*when new data content is created or stored*)
 - <https://data.wisc.edu/accessing-data/>
- Cybersecurity Governance, Risk Management and Compliance team
 - cybersecurity@cio.wisc.edu
- DoIT Middleware Systems Technology team
 - Email list: mstsupport@lists.wisc.edu
 - Web page for UW-Madison services/policies: <https://it.wisc.edu/services/iam/>
 - Web page for UW-System services/policies: <https://www.wisconsin.edu/systemwide-it/iam-integration/>
- Campus or Unit Purchasing Services
 - See [Campus Purchasing Services](#)
- Enterprise and IT Architects (*for larger or strategic initiatives*)
 - Enterprise Architects: <https://it.wisc.edu/about/division-of-information-technology/doit-departments/enterprise-internet-services-eis/>
 - Cloud Architect: Center of Excellence, [Office of the CIO](#)



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IT Project Intake Process Stats

➤ Total Proposals Submitted = 45

Total	Classification	%
31	Low Impact	69%
11	Medium Impact	24%
3	High Impact	7%

➤ Total Approved = 41

Classification	Total
Low Impact	29
Medium Impact	9
High Impact	3

➤ Pending Approval = 4

Classification	Total
Low Impact	2
Medium Impact	2
High Impact	0



IT Project Intake Process Stats

➤ Submissions by Campus Group

Campus Group	Total
Business	1
CALS	1
CIO Office	1
DCS	1
DoIT	3
Education	3
Enrollment	5
L&S	2
Libraries	1
Office of Legal Affairs	1
Office of Provost	8
Pharmacy	2
SMPH	9
VCFA	4
VCRGE	2
Vet Med	1

➤ Submissions by Month

Month	Total
Pre Go-live	4
October	1
November	4
December	6
January	10
February	6
March	2
April	9
May (As of 14 th)	3



Medium and High Impact Projects

High Impact Proposals	Campus Group
PeopleSoft Campus Solutions 9.2 (SIS) Upgrade	Enrollment
FP&M Work Order System	VCFA
Multifactor Authentication Implementation - Duo	CIO Office

Medium Impact Proposals	Campus Group
Student Management System for DCS and Student Design Pilot	Enrollment
Acumatica Cloud ERP Implementation	SMPH
Replacement of Two Legacy Student Housing Systems	VCFA
Campus Email Marketing Tool RFP	DoIT
WIDA eLearning for K12 Educators	Education
STUDYABROAD 2.0	Office of Provost
Chemistry Invoice System	L&S
Graduate Student Tracking System (GSTS)	VCRGE
Salesforce CRM Implementation	Enrollment
Career Services Software Project	Office of Provost
Enterprise Replacement for Scheduling Assistant - Starfish	Office of Provost



IT Project Intake Queue

Link → go.wisc.edu/itprojects

PROJECT NAME ▲	SUBMITTED ▼	PROJECT CLASSIFICATION ▲	CAMPUS GROUP ▲	SPONSOR EMAIL ▲	PROPOSER EMAIL ▲	APPROVAL STATUS ▲	APPROVAL DATE ▲
International Compliance and Record Management	2018/05/16	Pending Classification	Division of Student Life	kevin.helmkamp@wisc.edu	samantha.mccabe@wisc....	Pending Approval	
Software for documenting information about visitors to Memorial Library	2018/05/08	Low Impact	Libraries	mitch.lundquist@wisc.edu	mitch.lundquist@wisc.edu	Approved	2018/05/09
eFax Solution	2018/05/04	Low Impact	SMPH	sgehl@medicine.wisc.edu	jmb@medicine.wisc.edu	Approved	2018/05/09
Student Management System for DCS and Student Design Pilot	2018/05/02	Medium Impact	Enrollment	steve.hahn@wisc.edu ; jeffrey.russell@wisc.edu	stu.churchillhoyer@wisc.e...	Pending Approval	
Title IX/Equal Opportunity (EO) Complaint Investigation Database	2018/04/27	Low Impact	Office of Legal Affairs	cathy.trueba@wisc.edu	lauren.hasselbacher@wisc...	Approved	2018/05/01
Visitor Counter for CALS Allen Centennial Garden (ACG)	2018/04/27	Low Impact	CALS	ilgoldma@wisc.edu	bfuta@wisc.edu	Approved	2018/05/01
Acumatica Cloud ERP Implementation	2018/04/10	Medium Impact	SMPH	allen.benson@slh.wisc.edu	allen.benson@slh.wisc.edu	Pending Approval	
Informacast Implementation (Singlewire)	2018/04/10	Low Impact	SMPH	allen.benson@slh.wisc.edu	allen.benson@slh.wisc.edu	Approved	2018/05/01

Value to Stakeholders

- Highlights similar services
- Identifies infrastructure impacts
- Early Cybersecurity detection
- Better visibility to campus wide projects
- Enables collaboration



Success Stories

➤ **School of Business Proposal**

- Proposal to get an agile collaboration tool
- Previously used and eliminated due to limitations
- Better solution available, avoided same mistake

➤ **School of Medicine and Public Health**

- Need a HIPPA compliant e-Fax solution post VOIP
- Found a couple good options to consider



Thank you for your time and attention!



For additional information, please contact:

IT Center of Excellence, Office of the CIO

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Phone: (608) 263-7318

