

# UCF Rising

FFG Meeting

April 12, 2019

# UCF Rising Fun Facts

“UCF Rising” name was selected and voted by the Project Managers

Executive Leadership is represented by 5 key areas: Academic Affairs, Research, Finance & Accounting, and UCF IT

Timeline for deployment(s) were determined over a 3-week period by a 30+ person team

New Departmental Administrators Research Focus (“DARF”) was created as part of UCF Rising governance

HRS IRB was the first project to deploy in December 2018

Over 70 UCF and Huron employees are actively participating in UCF Rising

Exactly 1 year ago today, Huron (Doug / Alan) started the Discovery project

# Program Timeline

ID	Project	2018						2019						2020												
		Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
1		+ AAHRPP Re-Accreditation		+ NIH Proposal Deadline		+ NIH Proposal Deadline		+ NIH Proposal Deadline		+ NIH Proposal Deadline		+ NIH Proposal Deadline		+ AAALAC Re-Accreditation												
2	HRS IRB	Pre-Implementation Work						Post Go-Live Support						IRB Upgrade												
3	HRS Grants	Pre-Implementation Work						Post Go-Live Support						Grants Go-Live												
4								Agreements Go-Live						IACUC Go-Live												
5	HRS Agreements	Pre-Implementation Work						Post Go-Live Support						eCRT Upgrade												
6								IACUC Go-Live						ECC Go-Live												
7	HRS IACUC	Pre-Implementation Work						Post Go-Live Support						COI Upgrade												
8								IACUC Go-Live						COI Go-Live												
9	eCRT Upgrade	Pre-Implementation Work						Post Go-Live Support						PeopleSoft Grants												
10								PeopleSoft Grants Go-Live						HCM Commitment Accounting												
11	COI	Pre-Implementation Work						Post Go-Live Support						HCM Commitment Acctg Go-Live												
12								HCM Commitment Acctg Go-Live						Data Warehouse												
13	PeopleSoft Grants	Pre-Implementation Work						Post Go-Live Support						PUM & Tax Updates												
14								PUM: HCM & Campus Solutions						Infrastructure												
15	HRS Grants & PS Grants Integration	Pre-Implementation Work						Post Go-Live Support						Cradle Database Upgrade												
16	HCM Commitment Accounting	Pre-Implementation Work						Post Go-Live Support						PeopleTools Upgrade												
17								PeopleTools Upgrade						DataSite Orlando (ERP Servers)												
18	Data Warehouse	Pre-Implementation Work						Post Go-Live Support						Updates Continue w/ System Upgrades												
19	PUM & Tax Updates	PUM: HCM & Campus Solutions						PUM: FIN						HCM Tax Update												
20	Infrastructure	Cradle Database Upgrade						PeopleTools Upgrade						DataSite Orlando (ERP Servers)												

# Projects Overview



# University of Central Florida

## Huron Agreements

As of: April 4<sup>th</sup>, 2019

### Executive Summary

**Purpose:** Huron Agreements is one component of a comprehensive restructuring plan meant to modernize research administration business processes / technologies at UCF. The system provides management of financial and non-financial research agreements.

**Status Summary:** Huron Agreements is on-schedule, having finished up it's last development cycle iteration. User acceptance testing has begun, where we will ensure system changes align with business expectations.

### Project Status ●

Milestone	Status	Begin Date	End Date	New End Date
Onboarding	● Completed	10/15/2018	10/25/2018	N/A
Analysis	● Completed	10/29/2018	1/11/2018	N/A
Design	● Completed	10/29/2018	2/1/2018	N/A
Development	● Completed	1/9/2019	4/5/2019	N/A
Testing	● Started	3/25/2019	4/25/2019	N/A
Training	NS Not Started	5/20/2019	6/21/2019	N/A
Go-Live	NS Not Started	June	June	N/A
Post Go-Live Support	NS Not Started	June	July	N/A

### Risks / Issues / Decisions

**Risks**

- None

**Decisions**

- None

### Activities

**Completed:**

- Completed development and testing for Iteration #3 (Reports) and Iteration #4 (DocuSign)

**Started / Planned:**

- User acceptance testing (UAT) sessions have begun, and will continue throughout April

### Footnotes

\*eRA Program Management activities for entire HRS Implementation has used \$55,525 of \$130,000 budgeted for project (43%)

\*\*Grants & Agreements share same budget





# University of Central Florida

## Huron Grants

As of: April 4<sup>th</sup>, 2019

### Executive Summary

**Purpose:** Huron Grants is one component of a comprehensive restructuring plan meant to modernize research administration business processes / technologies at UCF. Huron Grants facilitates proposal submission and award management, as well as budget development and reconciliation. The system will be integrated w/Grants.gov and PS Grants to streamline business processes at UCF.

**Status Summary:** Huron Grants is on-schedule. Thus far, development work has mostly consisted of updates to Proposal SmartForm, SF424, and Conversion. Current development work is focused on updates to the Budget SmartForm.

### Project Status

Milestone	Status	Begin Date	End Date	New End Date
Onboarding	● Completed	9/17/2018	10/12/2018	N/A
Analysis	● Completed	10/12/2018	12/21/2018	N/A
Design	● On-track	10/12/2018	4/5/2019	N/A
Development	● On-track	1/9/2019	6/14/2019	N/A
Testing	NS Not Started	6/17/2019	9/30/2019	N/A
Training	NS Not Started	10/1/2019	10/31/2019	N/A
Go-Live	NS Not Started	10/28/2019	11/1/2019	N/A
Post Go-Live Support	NS Not Started	11/1/2019	2/28/2020	N/A

### Risks / Issues / Decisions

#### Risks

- None

#### Decisions

- Need final decision to be made on credit and F&A splits → proposal for simplified model for allocation of credit for tenure/promotion and F&A return was created and will need Advisory Committee approval

### Activities

#### Completed:

- Scheduled integration sessions w/PS Grants for mid-May

#### Started / Planned:

- Development tasks for Iteration #4 (Budget SmartForm)
- Updates to People and Organization data feeds from Research Warehouse to HRS System
- Scheduling sessions with end users to review current development work to ensure alignment w/business processes

### Footnotes

\*eRA Program Management activities for entire HRS Implementation has used \$55,525 of \$130,000 budgeted for project (43%)

\*\*Grants & Agreements share same budget





# University of Central Florida

## Huron IACUC

As of: April 4<sup>th</sup>, 2019

### Executive Summary

**Purpose:** Huron IACUC is one component of a comprehensive restructuring plan meant to modernize research administration business processes / technologies at UCF. Huron IACUC facilitates high-quality, compliant reviews for research studies involving the care or use of animal subjects.

**Status Summary:** The Huron IACUC Implementation has completed Onboarding sessions w/OAW staff and IACUC Committee Members. A detailed project plan is being created based on requirements from sessions, and development has begun.

### Project Status ●

Milestone	Status	Begin Date	End Date	New End Date	
Onboarding	●	Completed	2/25/2018	3/22/2018	N/A
Analysis	●	On-track	March*	April*	N/A
Design	●	On-track	March*	April*	N/A
Development	●	On-track	April*	June*	N/A
Testing	NS	Not Started	May*	June*	N/A
Training	NS	Not Started	June*	July*	N/A
Go-Live	NS	Not Started	July*	July*	N/A
Post Go-Live Support	NS	Not Started	July*	August*	N/A

### Risks / Issues / Decisions

#### Risks

- Relationship and business processes between IACUC and EH&S need mending

#### Decisions

- Decision to Go-Live with new software on July 12<sup>th</sup>, 2019

### Activities

#### Completed:

- Finished Onboarding sessions w/OAW staff and IACUC Committee Members
- Configured SSO in DEV/STG and set up Gold Store

#### Started / Planned:

- Plan to meet w/EH&S in mid-April to further define future state business processes between Safety and OAW/IACUC
- Plan to meet w/Dorothy Yates & Dr. Reinhart in April to review requirements
- Started development tasks associated with Iteration #1 (SmartForms)

### Footnotes

\*More granular dates for milestones will be provided on next status report, once a comprehensive Project Plan is created.

\*\*eRA Program Management activities for entire HRS Implementation has used \$55,525 of \$130,000 budgeted for project (43%)







# University of Central Florida

## Grants Management

As of: April 2, 2019

### Executive Summary

**Purpose:** Implement PS Grants for integration with Huron Research Suite and improve existing processes in supporting modules

**Status Summary:** Prototype phase ends next week after the Business Processes for IntraUnit Billing for BRIDG and AR Direct Journals are documented. The team will continue to use the prototype for testing development items, preparing for the testing phases, and fine tuning business processes. The business process for non-grants projects setup will not be used by Research Foundation as prototyping uncovered the need to capture proposal and award data. Construction, Facilities and Safety projects will not be separated into another Business Unit; integrated testing will be required. The HRS department picklist will be identified in PS. Budget levels was presented to DARF with feedback to add OPS.

Project Status <span style="color: green;">○</span>					Risks / Issues / Decisions
Milestone	Status	Begin Date	End Date	New End Date	
Business Process Reviews	<span style="color: blue;">○</span> Completed	1/8/2019	2/8/2019		<b>Risks</b> <ul style="list-style-type: none"> <li>Data entry support while integration with HRS under development (141)</li> <li>Rework may be necessary with future implementation of CoA (142)</li> <li>Further delays in beginning development could impact the timeline (226)</li> </ul> <b>Issues</b> <ul style="list-style-type: none"> <li>Usage of high level current state departments - Finance</li> <li>Commitment Control design - Finance</li> <li>Project ID Numbering – Finance/HRS</li> </ul>
Fit/Gap Analysis	<span style="color: blue;">○</span> Completed	1/8/2019	2/22/2019		
RICE Analysis	<span style="color: blue;">○</span> Completed	1/8/2019	2/22/2019		
Prototype Config / Testing	<span style="color: green;">○</span> In Progress	1/28/2019	4/12/2019 <sup>1</sup>		
Design I – Critical Path	<span style="color: yellow;">○</span> In Progress	2/11/2019	4/12/2019	4/26/2019 <sup>2</sup>	
Development I – Critical Path	<span style="color: yellow;">○</span> In Progress	3/11/2019	6/7/2019		
Reporting	<span style="color: green;">○</span> In Progress	3/18/2019 <sup>3</sup>	7/26/2019		
End-to-End Testing	<span style="color: grey;">○</span> Not Started	6/10/2019	7/26/2019		
User Acceptance Testing	<span style="color: grey;">○</span> Not Started	8/1/2019	9/13/2019		
Change Management	<span style="color: green;">○</span> In Progress	3/11/2019 <sup>3</sup>	10/11/2019		
Dry Run	<span style="color: grey;">○</span> Not Started	10/7/2019	10/18/2019		
Go-live / Support	<span style="color: grey;">○</span> Not Started	11/1/2019	12/20/2019		

### Activities

- Completed:**
- Billing Prototype
  - Non-grant Prototype
- Started / Planned:**
- 3 functional specs to be approved (History IDs, F&A, Cumulative Invoice Amounts)
  - Journal Prototype Session
  - Project ID Smart Number spec
  - Customer Type functional spec
  - Department for RDW spec
  - Project Budgets conversion spec
  - Customer Entry Business Process

### Footnotes

1. Combined Prototype Configuration and Testing
2. Extending to support HRS conversion design
3. Advanced start date to align with other team plans





# University of Central Florida

## HCM Commitment Accounting

As of: April 5, 2019

### Executive Summary

**Purpose:** The project moves UCF from custom to delivered PeopleSoft functionality for labor cost distribution to manage and track labor expenses. The changes will help areas across campus manage labor expenses with salary encumbrances, separating funding source tracking from personnel actions, moving salary cost transfers to be originated in HCM, generating fringe expenses, and delivering improved reporting on labor expenses and encumbrances.

**Status Summary:** System configuration, design, and functional specifications are being completed. Development is in progress.

### Project Status ○

Milestone	Status	Begin Date	End Date	New End Date
Initiate Phase	● Completed	12/10/18	1/31/19	2/15/19
Retrofit Analysis*	● Completed	12/10/18	2/15/19	2/22/19
Retrofit Development*	● Completed	1/21/19	3/15/19	
Analyze Phase	✘ Missed Date	2/4/19	3/15/19	4/12/19
Design Phase	● On track	2/18/19	4/30/19	
Development Phase	● On track	3/4/19	5/31/19	
System Integration Testing	NS Not Started	6/3/19	7/26/19	
User Acceptance Testing	NS Not Started	7/29/19	9/20/19	
Training Phase	NS Not Started	8/19/19	11/15/19	
Implement Phase	NS Not Started	9/2/19	11/4/19	
Support Phase	NS Not Started	11/4/19	12/6/19	

### Risks / Issues / Decisions

#### Issues

- Finance and accounting needs to decide where expired grants and projects should charge actuals and encumbrances (PHCM-92)

#### Decisions

### Activities

#### Completed:

- Met with finance and accounting to discuss encumbrance and actual charges for expiring grants and contracts
- Met with Department Administrators Research Focus (DARF) group to discuss the management of funding end dates on HCM funding sources

#### Started / Planned:

- Wrapping up analyze phase
- Working on configuration, designs and functional specifications
- Development is in progress

### Footnotes

\* Retrofit activities involve the analysis and modification of known UCF reports and processes impacted by moving to commitment accounting

# Program Organization

# Program Governance Structure

**Executive Steering Committee**

Dr. Elizabeth Dooley (Chair)  
 Dr. Elizabeth Klonoff  
 Dr. Joel Hartman  
 Kathy Mitchell  
 Misty Shepherd

**Huron Advisors**

Jennifer Pavelec (Relationship Manager)  
 Dave Klipa (CoA Advisor)  
 Jim Roth (Strategic Advisor)

**DARF**

Greg Norris  
 Tamara Gabrus

**Advisory Council**

Dorothy Yates (Chair), Dr. Michael Georgiopoulos, Dr. Michael Johnson, Dr. Ivan Garibay, Dr. Debbie Reinhart, Maureen Binder, Dr. Ozlem Garibay, Tamara Gabrus, Adam Glover, Greg Norris, Brad Hodum, Program PMs

**Program Management: Mike Sink, Cara Grib, Doug Bauman**

**Wahoo: Chris Meholic, Doug Bauman**

Project	Lead	Business Owner
IRB	Nicholas Rufrano Alan Dull	Renea Carver, Gillian Morien
Grants	Christine Silver Doug Bauman	Jennifer Shambrook, Michelle Greco
Agreements	Jennifer Bouvier Doug Bauman	Jane Gentilini
IACUC	Nicholas Rufrano Alan Dull	Cristina Calcano
ECC	Christine Silver Marty Bergenson	Doug Backman
COI	Nicholas Rufrano Alan Dull	Doug Backman
RDW	Jason Kuhns	Chad Macuszonok
PARIS / Aurora / TERA	Ezequiel Gioia Raghu Avula	Chad Macuszonok

**Integration: Dorann Mullins, Chris Meholic, Tracey Hennemann**

Project	Lead	Business Owner
PS Grants	Chris Meholic, Dorann Mullins, Tracey Hennemann	Dorothy Yates
Change Management	Mark Wray	F&A TBD, Dorothy Yates

**PeopleSoft: Becky Vilsack, Becky Moulton, Cara Grib**

Project	Lead	Business Owner
HCM Enhancements	Becky Moulton Jason Jones	Maureen Binder
Oracle Database Upgrade	Jim Ennis	Mike Sink
PeopleTools Upgrades (HCM, FI)	Felicia Kendall	Mike Sink
PS Financials PUM Application	Felicia Kendall	Mike Sink

# Wahoo Project Structure

## Wahoo

Chris Meholic, Doug Bauman

### IRB

Nicholas Rufrano, Alan Dull

Name	Dept
Renea Carver	IRB Office
Gillian Morien	IRB Office

### HRS Grants

Christine Silver, Doug Bauman

Name	Dept
Jennifer Shambrook	OSP
Celeste Rivera-Nunez	OSP
Michelle Greco	Grant Accounting
Brenda Jackson	Grant Accounting
Kim Smith	Research Foundation
Terri Bigham	Research Foundation
Megan Carrigan	Research Foundation

### Agreements

Jennifer Bouvier, Doug Bauman

Name	Dept
Jane Gentilini	Contracts Office

### IACUC

Nicholas Rufrano, Alan Dull

Name	Dept
Cristina Calcano	OAW

### ECC

Christine Silver, Marty Bergenson

Name	Dept
Daniel Sierra	ECC
Sarah Farrell	ECC

### COI

Nicholas Rufrano, Alan Dull

Name	Dept
Sara Waugh	COI Office
Paula Seigler	COI Office

# PeopleSoft Project Structure

## PeopleSoft

Becky Vilsack, Becky Moulton, Cara Grib

### HCM Enhancements Becky Moulton, Jason Jones

Name	Dept
Molly Myers	HR
Maureen Binder	HR
Terri Smith	HR
Steve Grier	Huron
Rajesh Nallala	Huron

### Finance Varsha Das

Name	Dept
Brad Hodum	F&A
Donna Dubuc	F&A
Marcia Maukonen	FSS
Michael Stein	F&A
Rich Strohfus	FSS
Elena Wilson	FSS
Brad Smith	FSS
Reggie Besana	FSS
Pradeep Nimmathota	FSS
Kristal Jackson-Hale	FSS
Kevin Stapp	Huron

### Technical Upgrades Felicia Kendall

Name	Dept
Jim Ennis	UCF IT

DARF Greg Norris, Tamara Gabrus	
Name	Dept
Barry Wick	
Erin Blackwell	
Vicki Vitale	
Jennifer Parker	
Kristin Wetherbee	
Venessa Nieves	
Ginny Pellam	
Elise Dantuma	
Seresa Cruz	
Kerry Gajewski	
Nanette Aubert	
Mark Wagenhauser	

# Integration Project Structure

Integration	
Dorann Mullins, Chris Meholic, Tracey Hennemann	

  

PS Grants Chris Meholic, Dorann Mullins, Tracey Hennemann	
Name	Dept
Michelle Greco	Grant Accounting
Brenda Jackson	Grant Accounting
Yelitza Burleson	Grant Accounting
Kim Smith	Research Foundation
Efrain Guzman-Carrera	FSS
Libby Sanders	FSS
Pradeep Nimmathota	FSS
Jay Holt	FSS
Brad Smith	FSS
Celanire Flagg	Huron

  

Change Management Mark Wray	
Name	Dept
Craig Froehlich	UCF IT
Zenaida Kotala	Office of Research
Lorie Matejowsky	Human Resources
Briant Coleman	Academic Affairs



