Executive Sponsor(s): Jessie Minton
Project Manager: Tony Saxman

Executive Summary Describe the business reason(s) for initiating the project, specifically stating the business problem.

The Enterprise University Applications (EUA) Project is part of the Transform IT program at the University of Oregon. The goal of Transform IT is to rationalize the use of information technology resources on campus to better support the University of Oregon’s strategic academic and research missions.

Today the university has many departments and colleges on campus offering a variety of similar application and software solutions, resulting in an inefficient use of resources, a fragmentation of software spending, and duplication of tools, processes, and services. EUA will rationalize the use of Information Technology resources on campus and increase the level of IT maturity while creating an equity in the technology services provided.

The EUA project has been broken into three initiatives:

- Initiative 1: Identify and Catalog Enterprise Applications used on campus
- Initiative 2: Identify and Catalog Single Source (“Unique”) applications used on campus
- Initiative 3: Identify and Catalog Custom Developed Applications used on campus (Note: Some custom developed applications may meet criteria for being “Enterprise” applications.)

This project will be completed in two phases:

- Phase 1: Discovery (Completed on Oct 8th, 2019)
  - The Discovery phase produced a categorized list of all software purchases and costs on campus.
- Phase 2: Analysis and Recommendations (Current Phase)
  - The Analysis and Recommendations phase will examine the software categories from phase 1 and make recommendations with regard to:
    - What software tools the university will adopt as Enterprise Software
    - Which unit will configure and manage the software/applications
    - Where the software/application will live - hosted in the cloud or hosted on premise
  - Following Transform IT standards,
    - The project will use our Core and Common and Unique framework
    - Core and Common software will be delivered from an Enterprise level, Unique software will be analyzed on a case-by-case basis
  - Team recommendations will be approved by the CIO and then reviewed by the Transform IT Steering Committee. Once approved, separate projects will be scheduled, staffed and implemented.

Project Description Describe how the high-level solution the project will use to address the University problem.
The Enterprise University Applications Analysis and Recommendations project will build a cross-functional team to examine campus software purchases by category type and make recommendations with regard to:

- What software tools the university will adopt as Enterprise Software
- Which unit will configure and manage the software/applications
- Where the software/application will live - hosted in the cloud or hosted on premise
- Review and analyze current application development to assess whether applications being developed meet definition of Enterprise Software.
  - Make recommendations for hosting, managing, and ongoing development for “In-House” developed applications that meet the definition of Enterprise Software

**Project Goals and Objectives** Describe the business goals and objectives of the project.

- To establish a comprehensive software services catalog, to provide visibility into what software solutions are already available for campus use and which units support those solutions.
- To establish an Enterprise University Applications definition which will create consistency in understanding with regard to purchase of applications by users and units.
- To consolidate the financial management of the same software offerings used throughout campus to take advantage of volume discount pricing or licensing costs.
- To reduce the number of similar software solutions used across campus, therefore allowing support staff to focus their training efforts and become experts, which leads to better end user support.
- To centralize support services where it makes sense to provide standard Core, Common and Unique services.
- To provide recommendations for policy and procedure for review and adoption of future potential enterprise applications

**Strategic Alignment** Select Institutional Priorities this project supports. [https://provost.uoregon.edu/strategic-framework](https://provost.uoregon.edu/strategic-framework)

<table>
<thead>
<tr>
<th>☐</th>
<th>☐</th>
<th>☐</th>
<th>☒</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance the impact of research, scholarship, creative inquiry and graduate education.</td>
<td>Promote and enhance student access, retention and success.</td>
<td>Attract and retain high quality, diverse students, faculty and staff.</td>
<td>Enhance physical, administrative and IT infrastructure to ensure academic excellence.</td>
</tr>
</tbody>
</table>

**Project Scope** Define project limits and identifies the products and/or services delivered by the project.

**In Scope**

- Definition and categorization of enterprise University applications
- Creation of University applications software services catalog including, on-premise, hosted, In-house developed applications, and SaaS.
• Recommendation of consolidation of applications by software type category based upon Core, Common, Unique framework.
• List of “Unique” applications that would benefit from central management
• Custom developed/built solutions to be evaluated as discovered through the life-cycle of this project

Out of Scope

•

Deliverables

• To create a comprehensive software services catalog which includes:
  • Software services offered on campus by category
  • Service owner and support for software services
  • Recurring costs: Licenses, Maintenance, Subscriptions, Hosting costs
  • Associated costs: Staffing, Hardware Maintenance and Replacement Cycle
  • Funding source (general fund, ICC, etc.), type of purchase (credit card, contract)
• To provide a recommendation and implementation plan for each software category, which can be implemented as separate projects once approved.

Risk

<table>
<thead>
<tr>
<th>Risk</th>
<th>Risk Rating (H,M,L)</th>
<th>Mitigation Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some groups may not agree with and therefore not support the application tool consolidation recommendations</td>
<td>H</td>
<td>CIO will discuss tool reduction or consolidation with stakeholders and will be responsible for mitigating this risk</td>
</tr>
<tr>
<td>Availability of subject matter experts throughout the entire project</td>
<td>M</td>
<td>Be upfront on time needed from subject matter experts and get commitment. If team member commitment circumstances change then find replacement team member.</td>
</tr>
<tr>
<td>Procurement cards funds, non-recurring funds, and carry forward funds may not be captured disallowing consolidation and new licensing opportunities.</td>
<td>L</td>
<td>Seek funds in/from other areas for consolidation and new licensing opportunities.</td>
</tr>
</tbody>
</table>

Timeline/ Milestones

<table>
<thead>
<tr>
<th>Timeline/ Milestones</th>
<th>Estimated Target Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase 2 Project Charter Complete</td>
<td>15-NOV-2019</td>
</tr>
</tbody>
</table>
### Project Charter

#### Define Project Approach and Guidelines

- **15-NOV-2019**

#### Build Recommendation Team

- **22-NOV-2019**

#### Phase 2 Kick Off Meeting

- **06-DEC-2019**

#### Recommendation Document Complete

- **30-MAR-2020**

#### Feedback and Recommendation Revisions

- **30-APR-2020**

#### Lessons Learned

- **15-MAY-2020**

### Constraints

*Describe any project constraints being imposed in areas such as schedule, budget, resources, products to be reused, technology to be employed, products to be acquired, and interfaces to other products*

- Subject matter expert availability

### Stakeholders

*Project stakeholders are individuals and/or organizations that are actively involved in the project, or whose interests may be affected as a result of project execution or project completion.*

<table>
<thead>
<tr>
<th>Stakeholder Role</th>
<th>Name</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Representation for different colleges based on IT Director input</td>
</tr>
</tbody>
</table>

### Roles and Responsibilities

<table>
<thead>
<tr>
<th>Project Role</th>
<th>Name</th>
<th>Project Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor</td>
<td>Jessie Minton</td>
<td>Authorizes project initiation, schedule and completion</td>
</tr>
<tr>
<td>Project Manager</td>
<td>Tony Saxman</td>
<td>Responsible for all project management activities</td>
</tr>
<tr>
<td>Business Analyst</td>
<td>Tommy Harmon</td>
<td>Provide analysis support in the gathering, organizing and documenting analysis results</td>
</tr>
<tr>
<td>Subject Matter Experts</td>
<td>TBD (To be selected from IT Directors)</td>
<td>To determine software and categorization in services category catalog and to assess and provide move forward recommendation for each category such as consolidate, Move to SaaS, Move to On-Premise or Migrate Service Delivery</td>
</tr>
</tbody>
</table>

### Estimated Costs

*Identify the funding amount*

<table>
<thead>
<tr>
<th>Type</th>
<th>Professional Services</th>
<th>PMO Resources</th>
<th>Hardware</th>
<th>Software</th>
<th>Licenses</th>
<th>Other</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
</table>

---

*Project Charter-EUA Analysis and Recommendation.docx*
## Enterprise Business Applications: Analysis and Recommendation

### Project Charter

<table>
<thead>
<tr>
<th></th>
<th>$0</th>
<th>$0</th>
<th>$0</th>
<th>$0</th>
<th>$0</th>
<th>$0</th>
<th>$0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On-Going</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>