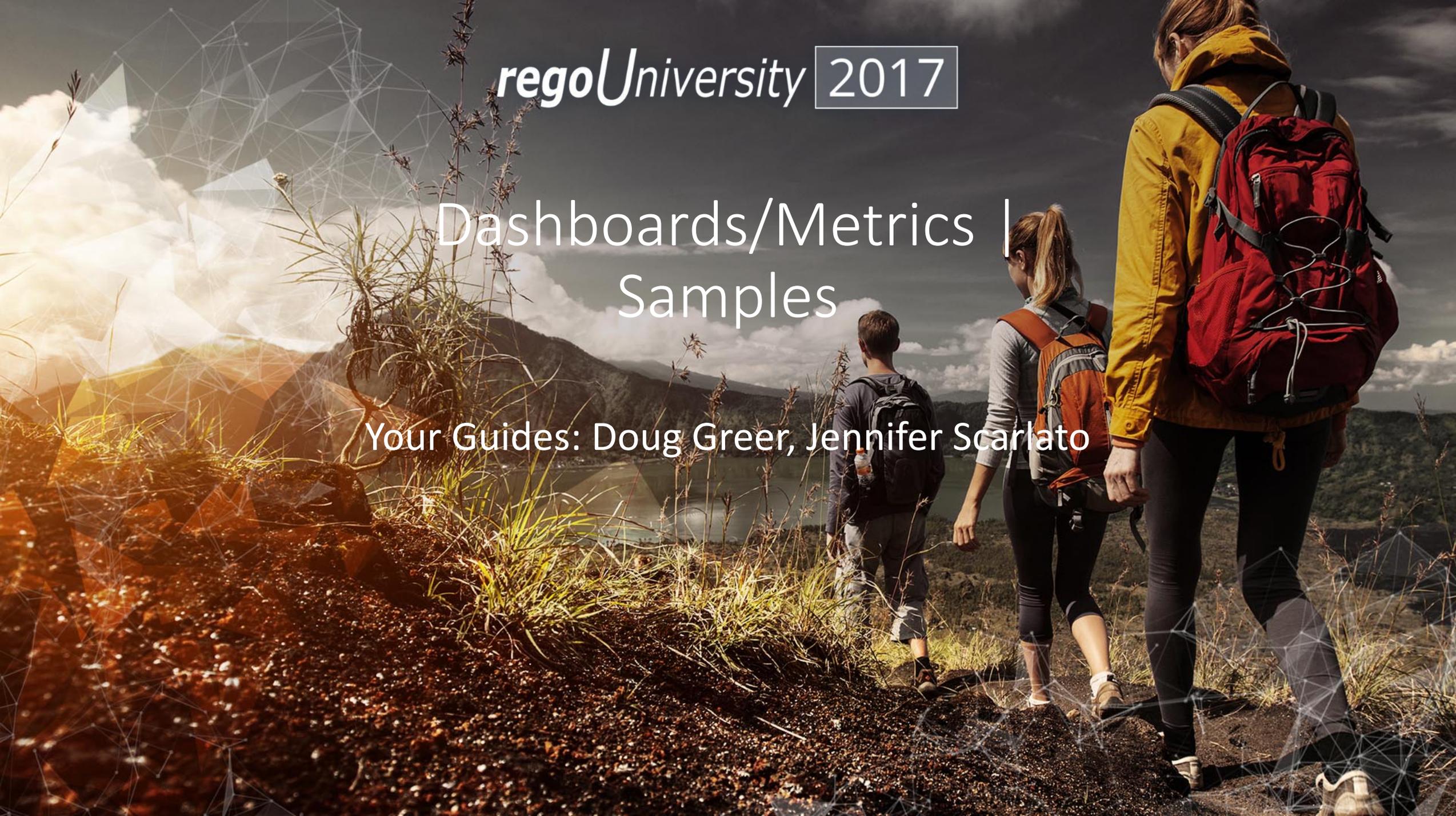


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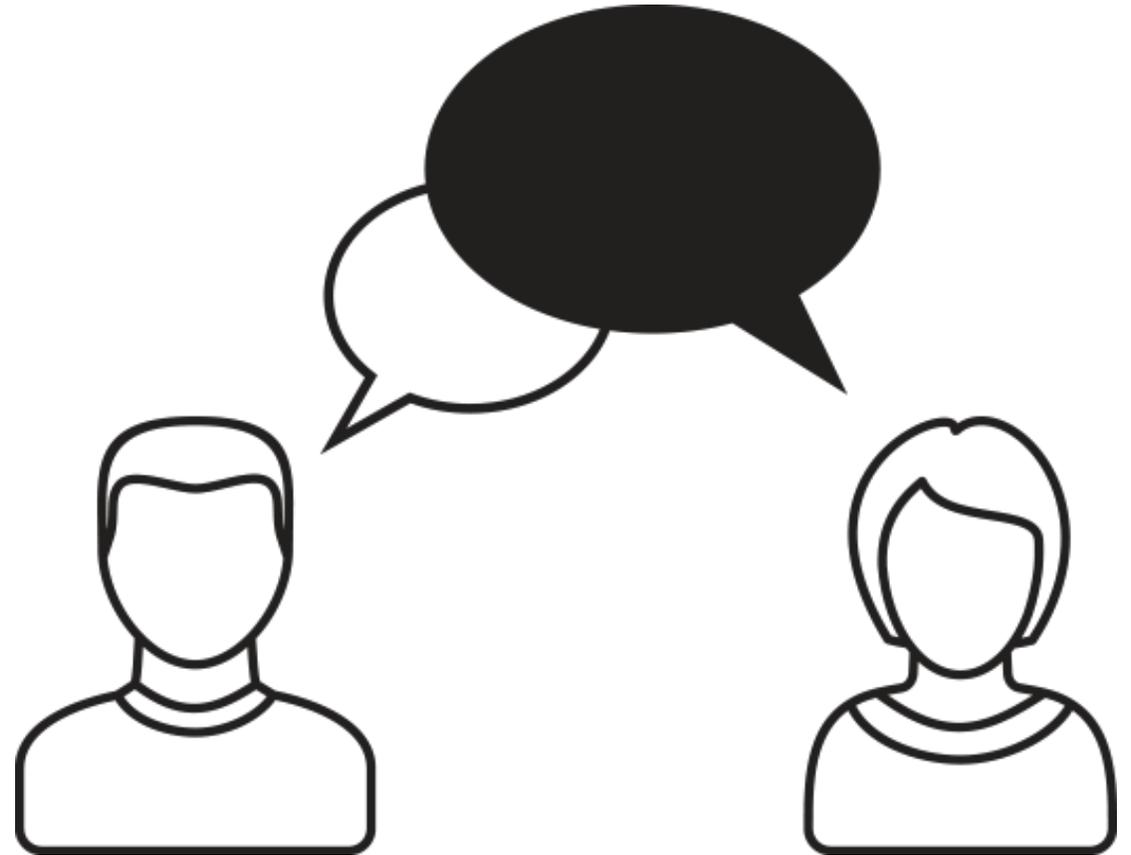
# Dashboards/Metrics | Samples

Your Guides: Doug Greer, Jennifer Scarlato



# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



# Agenda

- Metrics Overview
- Samples
  - Out of the Box
  - CA PowerBI
  - RegoXchange
  - Custom
  - Rego Adoption Package
- Summary
- Appendix: More Dashboards

# Metrics Overview

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# What Is A Metric?

- A quantitative property of a process or product whose possible values are numbers.
  - A measure is a specific value of a metric for a given process or product.
  - A unit that is used to collect data in order to report on the state of a particular service
  - A quantifiable measure used to track, monitor and assess the progress, success or failure of a business processes.
- 
- Key references:
    - Metrics for Project Management... by Rad & Levin
    - Enterprise Dashboards... by Malik
    - Key Performance Indicators... by Parmenter

# Why Use Metrics?

- To align behaviors with business goals
- Bring awareness to areas of improvement
- Empowers people to self manage
- Hard facts to make real decisions from
- To prove we are getting better
- To become better
  
- Why Not
  - “It’s best practice”
  - “Because the CIO told me to”
  - To create a “Naughty” list

# Metric Classifications

- Metric Calculations
  - Objective
  - Subjective
- Metric Timing
  - Leading
  - Lagging
- Metric Categories
  - Compliance
  - Governance
- Metric Slicing
  - By Timescale
  - By Organization
- Metric Types
  - Quantitative
  - Qualitative

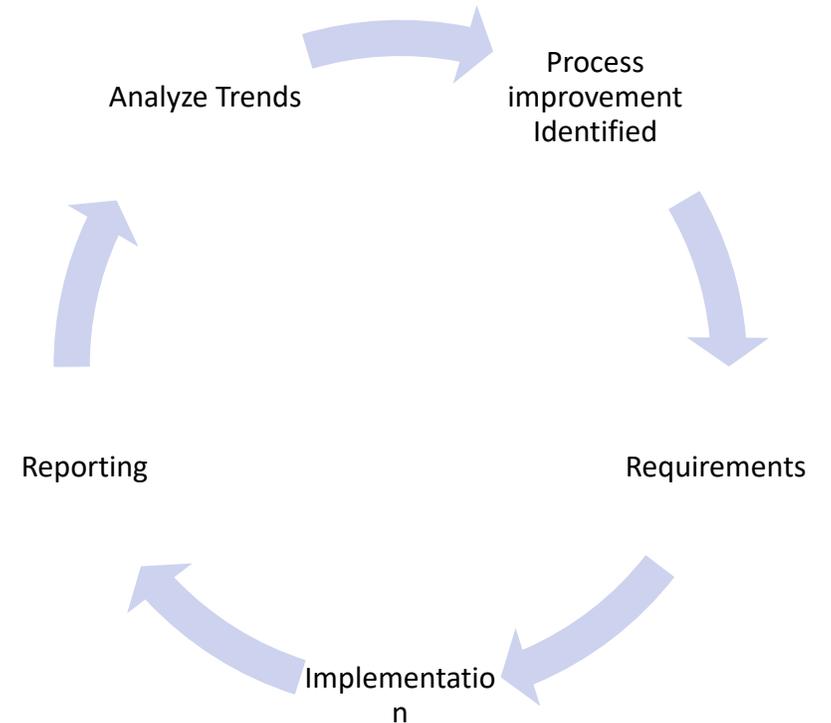
- Metric Formats

- Counts
- Percentages
- Ratings
- Trends

Metric	Specific	Measurable	Actionable	Relevant	Timely
Total project hours	✓	✓	✗	✗	✗
% of projects finishing on schedule	✓	✓	✓	✓	✓
# of contractor labor resources	✓	✓	✓	✗	✗
% Timesheets submitted on time in Q1	✓	✓	✓	✓	✓
Forecasted resource utilization	✓	✓	✓	✓	✗

# Step By Step Guide To Metric Development

1. Know your company goals
2. Create metrics that drive desired behavior and align with goals
3. Test your metric against the SMART system
4. Determine feasibility of gathering data
5. Test your metric
6. Review with key stakeholders
7. Make decision to use or discard



# Common PPM Metrics

- Scope
  - # changes / project duration in days (bad req. or bad PM)
  - Customer satisfaction (survey 1-10)
- Schedule
  - % of open tasks with finish date < one week ago (stale)
  - % projects on-time
  - % of tasks completed on time
  - % of tasks completed within baseline duration
  - % of tasks completed within baseline hours
  - % Milestones on time
  - Actual/Estimate - % to estimate
  - Average task duration or effort (good plans)
  - % tasks assigned 3 months out (how well advanced planning)
  - # of baselines
  - Milestone Burndown
  - Cross Project Dependency Slack
- Budget
  - % projects on-budget
  - % complete vs. % money expended
  - Actual / budgeted ROI
  - Total support costs for x months after solution is completed
  - Amount of project manager time vs. overall effort hours
  - % change in NPV/IRR from gate to gate
  - Benefits realized vs. benefits planned
  - % projects with current financial forecasts
- Overall Project
  - Subjective R/Y/G on projects by the PM (PMs thoughts)
  - Duration between steps, phases, stages, etc
  - # issues / project duration in days
  - How long issues remain open
  - % projects with current status reports
  - Number of defects discovered after initial acceptance / dev hours
  - Counts and amounts for projects in Red/Amber/Green status
  - # issues by severity: opened, closed, on-hold
  - % projects failed gate review
  - % projects that delayed gate review
- Time (Not Project Related)
  - Time not submitted on time
  - Ave hours worked by staff
  - % internal vs. external resources
  - Time to assign WR (response time)
  - Time by % Admin, Projects, Maintenance (Doing the right things)
- Resource Management
  - % of resources with “appropriate” allocations 6-9 months in the future
  - % of resources with “appropriate” assignments 0-3 months in the future
  - Forecasted Utilization % by project manager for next 0-3 months
  - Actual Utilization % by project manager for last 3 months
  - Workloads by resources or manager - # projects they support

# Open Mic

- Show of hands: where are Dashboard/KPI requests coming from?
  - Upper Management?
  - Portfolio Managers?
  - Program/Project Managers?
  - Resource Managers?
  - Finance?
- Show of hands: what tool do you use for Dashboards/Metrics?
  - Portlets?
  - Jaspersoft?
  - Tableau?
  - PowerBI?

# Samples: OOTB Metric Dashboards

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# OOTB Metrics – Tasks

Project / WBS	Start	Finish	Overall Status	Schedule %	Days Late
Client Services Datamart	5/5/15	1/2/16	<span style="color: orange;">◆</span>	<span style="color: red;">◆</span>	131
Initiation Phase	5/5/15	5/5/15		<span style="color: red;">◆</span>	47
Initiating Process Complete	5/5/15	5/5/15		<span style="color: red;">◆</span>	47
Planning Phase	5/5/15	6/1/15		<span style="color: red;">◆</span>	20
Define Scope Change and Control Process	5/5/15	5/11/15		<span style="color: red;">◆</span>	41
Define Resource Plan	5/12/15	5/25/15		<span style="color: red;">◆</span>	27
Risk Response and Mitigation Plan	5/12/15	5/25/15		<span style="color: red;">◆</span>	27
Identify Infrastructure Requirements	5/26/15	6/1/15		<span style="color: red;">◆</span>	20
Complete Project Plan	5/26/15	6/1/15		<span style="color: red;">◆</span>	20
Planning Phase Gate Complete	6/1/15	6/1/15		<span style="color: red;">◆</span>	20
Design Phase	6/2/15	6/22/15		<span style="color: green;">◆</span>	0
Construction Phase	6/23/15	7/27/15		<span style="color: green;">◆</span>	0
Deployment and Quality Phase	7/28/15	8/17/15		<span style="color: green;">◆</span>	0
Closing Phase	8/18/15	8/24/15		<span style="color: green;">◆</span>	0
Data Warehouse Performance Tuning	5/5/15	9/14/15			
eCommerce Portal	3/3/15	10/16/15			
Financial Process Audit	6/5/15	9/24/15			
Online Order Catalog	5/5/15	7/14/15			
Online Order Performance Improvements	5/5/15	8/24/15			
2015 Spring Franchise Manager Release	2/8/16	5/1/17			

Gantt Schedule

	Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15
Client Services Datamart						
Initiating Process Complete						
Planning Phase Gate Complete						
Design Phase Gate Complete						
Construction Phase Gate Complete						
Deployment and Quality Phase Gate Complete						
Closing Phase Gate Complete						

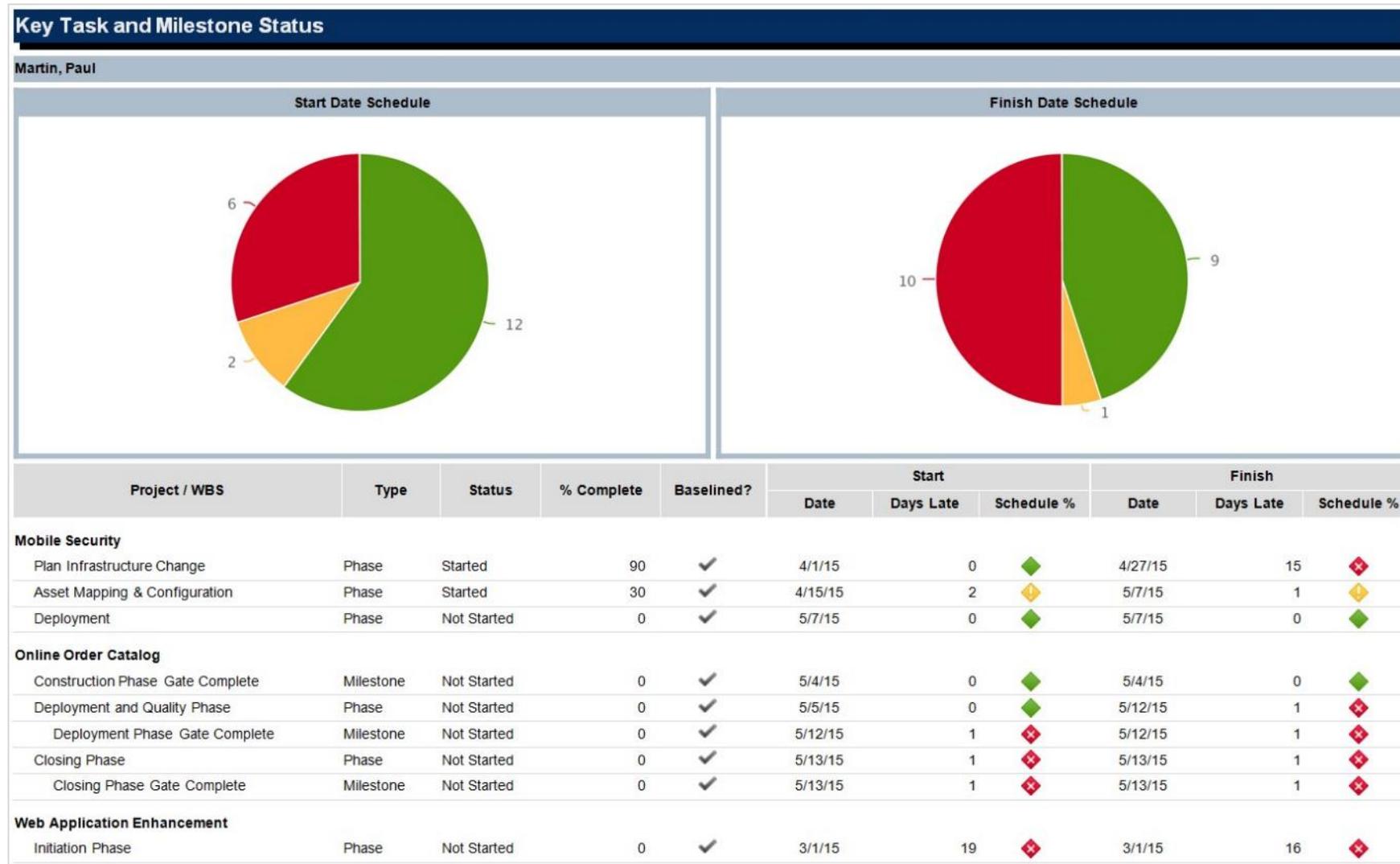
Milestones					
Project	Milestone	Finish	Schedule %	Days Late	
Client Services Datamart	Initiating Process Complete	11/4/14	<span style="color: red;">◆</span>	229	
Data Warehouse Performance Tuning	Initiating Process Complete	11/4/14	<span style="color: red;">◆</span>	229	
Online Order Performance Improvements	Initiating Process Complete	11/4/14	<span style="color: red;">◆</span>	229	
eCommerce Portal	Planning Phase Gate Complete	11/8/14	<span style="color: red;">◆</span>	27	
Client Services Datamart	Planning Phase Gate Complete	12/1/14	<span style="color: red;">◆</span>	202	
Online Order Performance Improvements	Planning Phase Gate Complete	12/1/14	<span style="color: red;">◆</span>	202	
Financial Process Audit	Initiating Process Complete	12/5/14	<span style="color: red;">◆</span>	198	
Client Services Datamart	Design Phase Gate Complete	12/22/14	<span style="color: red;">◆</span>	181	
Data Warehouse Performance Tuning	Planning Phase Gate Complete	12/22/14	<span style="color: red;">◆</span>	181	
Online Order Performance Improvements	Design Phase Gate Complete	12/22/14	<span style="color: red;">◆</span>	181	

Page 1 of 2      Displaying 1 - 10 of 16

Upcoming Milestones			
Milestone	Finish	Schedule %	Days Late
Initiating Process Complete	6/5/15	<span style="color: red;">◆</span>	15
Planning Phase Gate Complete	7/2/15	<span style="color: green;">◆</span>	0
Design Phase Gate Complete	7/23/15	<span style="color: green;">◆</span>	0
Construction Phase Gate Complete	8/27/15	<span style="color: green;">◆</span>	0
Deployment Phase Gate Complete	9/17/15	<span style="color: green;">◆</span>	0
Closing Phase Gate Complete	9/24/15	<span style="color: green;">◆</span>	0

Page 1 of 2      Displaying 1 - 6 of 6

# OOTB Metrics – Tasks



# OOTB Metrics – Project/Program - Variances

**Schedule Performance Drill Down**

Paul Martin | OBS | Project Manager: Martin, Paul | As Of Date: 5/31/15 | Days Outlook: | Filter | More

**Schedule Performance Details**

Project	Task	Status	Classification	Finish	Schedule %	Days Late	BAC	Actuals	ETC	EAC	Projected Effort Variance	Projected Effort Variance %
Client Services Datamart	Define Scope Change and Control Process	Not Started	Critical Late	5/11/15	❖	41	40	0	40	40	0	❖
eCommerce Portal	Complete Project Plan	Started	Critical Late	5/11/15	❖	25	160	76	84	160	0	❖
Online Order Performance Improvements	Define Scope Change and Control Process	Not Started	Critical Late	5/11/15	❖	41	40	0	40	40	0	❖
Client Services Datamart	Define Resource Plan	Not Started	Critical Late	5/25/15	❖	27	80	0	80	80	0	❖
Client Services Datamart	Risk Response and Mitigation Plan	Not Started	Critical Late	5/25/15	❖	27	160	0	160	160	0	❖
Online Order Performance Improvements	Risk Response and Mitigation Plan	Not Started	Critical Late	5/27/15	⚠	2	160	0	160	160	0	❖
Client Services Datamart	Complete Project Plan	Not Started	Critical Late	6/1/15	❖	20	120	0	120	120	0	❖
Data Warehouse Performance Tuning	Define Resource Plan	Not Started	Critical Late	6/1/15	❖	20	160	0	160	160	0	❖
Online Order Catalog	Database Development	Not Started	Critical Late	6/1/15	❖	20	320	0	320	320	0	❖
Online Order Performance Improvements	Complete Project Plan	Not Started	Critical Late	6/1/15	❖	20	120	0	120	120	0	❖
Client Services Datamart	Requirements Definition	Not Started	Critical Late	6/8/15	❖	13	80	0	80	80	0	❖
Online Order Performance Improvements	Requirements Definition	Not Started	Critical Late	6/8/15	❖	13	200	0	200	200	0	❖
Financial Process Audit	Define Scope Change and Control Process	Not Started	Critical Late	6/11/15	❖	10	40	0	40	40	0	❖
Data Warehouse Performance Tuning	Risk Response and Mitigation Plan	Not Started	Critical Late	6/15/15	❖	6	240	0	240	240	0	❖
Data Warehouse Performance Tuning	Requirements Definition	Not Started	Critical Late	7/1/15	⚠	2	200	0	200	200	0	❖
eCommerce Portal	Requirements Definition	Started	Critical Late	7/1/15	❖	23	340	0	340	340	0	❖
eCommerce Portal	Hardware Acquisition	Started	Critical Late	7/2/15	❖	23	0	0	0	0	0	❖
<b>Total</b>						<b>333</b>	<b>2,460</b>	<b>76</b>	<b>2,384</b>	<b>2,460</b>	<b>0</b>	

Displaying 1 - 17 of 17

**Project KPIs by OBS**

[Filter: None]

OBS / Project	Manager	Business Alignment	Schedule %	Days Late	Projected Cost Variance %	Projected Effort Variance %	Risk	Issue	Change
All Groups		❖	❖	142	❖	❖	❖	❖	❖
Application Mgt		⚠	❖	199	❖	❖	❖	❖	❖
Global HR Application Maintenance	McCarthy, John	⚠	❖	199	❖	❖	❖	❖	❖
Business Technologies		⚠	❖	77	❖	❖	❖	❖	❖
Client Services Datamart	Martin, Paul	⚠	❖	131	❖	❖	❖	❖	❖
eCommerce Portal	Martin, Paul	⚠	❖	50	❖	❖	❖	❖	❖
Online Order Performance Improvements	Martin, Paul	⚠	❖	49	❖	❖	❖	❖	❖

**Project Lifecycle Review**

Project	Project Manager	Stage	Start	Finish	Schedule %					
					Initiation Phase	Planning Phase	Design Phase	Construction Phase	Deployment and Quality Phase	Closing Phase
Social Networking Security Upgrade	Paxton, Robyn	🟢	8/3/15	11/5/15	❖	❖	❖	❖	❖	❖
CRM Enhancements	Riviera, Alex	🟢	3/2/15	8/4/15	❖	❖	❖	❖	❖	❖
eCommerce Portal	Martin, Paul	🟢	3/3/15	10/16/15	❖	❖	❖	❖	❖	❖
Mobile Device Management (MDM) Deployment	Paxton, Robyn	🟡	9/2/15	8/31/16	❖	❖	❖	❖	❖	❖
Mobile Identity Management Enhancements	Paxton, Robyn	🟢	6/15/15	10/2/15	❖	❖	❖	❖	❖	❖
System Upgrade Release 14	Paxton, Robyn	🟢	7/3/15	7/1/16	❖	❖	❖	❖	❖	❖
Mobility Management Services	Tanner, Paul	🟢	6/5/15	12/10/15	❖	❖	❖	❖	❖	❖
eBusiness Mobile Network	Paxton, Robyn	🟢	1/5/15	1/4/16	❖	❖	❖	❖	❖	❖
Office Upgrade	Tanner, Paul	🟢	2/16/15	2/15/16	❖	❖	❖	❖	❖	❖
Meeting Reservation Portal	Tanner, Paul	🟢	5/5/15	10/31/16	❖	❖	❖	❖	❖	❖
Online to Offline Market	McCarthy, John	🟢	7/3/15	10/16/15	❖	❖	❖	❖	❖	❖
BYOD Management	Tanner, Paul	🟢	8/3/15	2/5/16	❖	❖	❖	❖	❖	❖
Online Order Performance Improvements	Martin, Paul	🟢	5/5/15	8/24/15	❖	❖	❖	❖	❖	❖
CRM Contact Center Development	Riviera, Alex	🟢	2/2/15	6/30/15	❖	❖	❖	❖	❖	❖

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# OOTB Metrics – Project/Program - Status

Status Report Review: Status Report Listing

OBS Project Manager Filter More

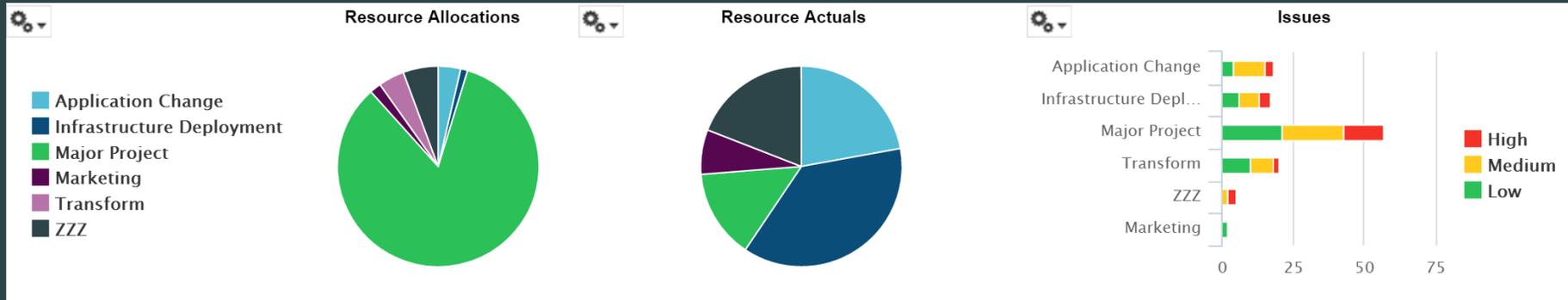
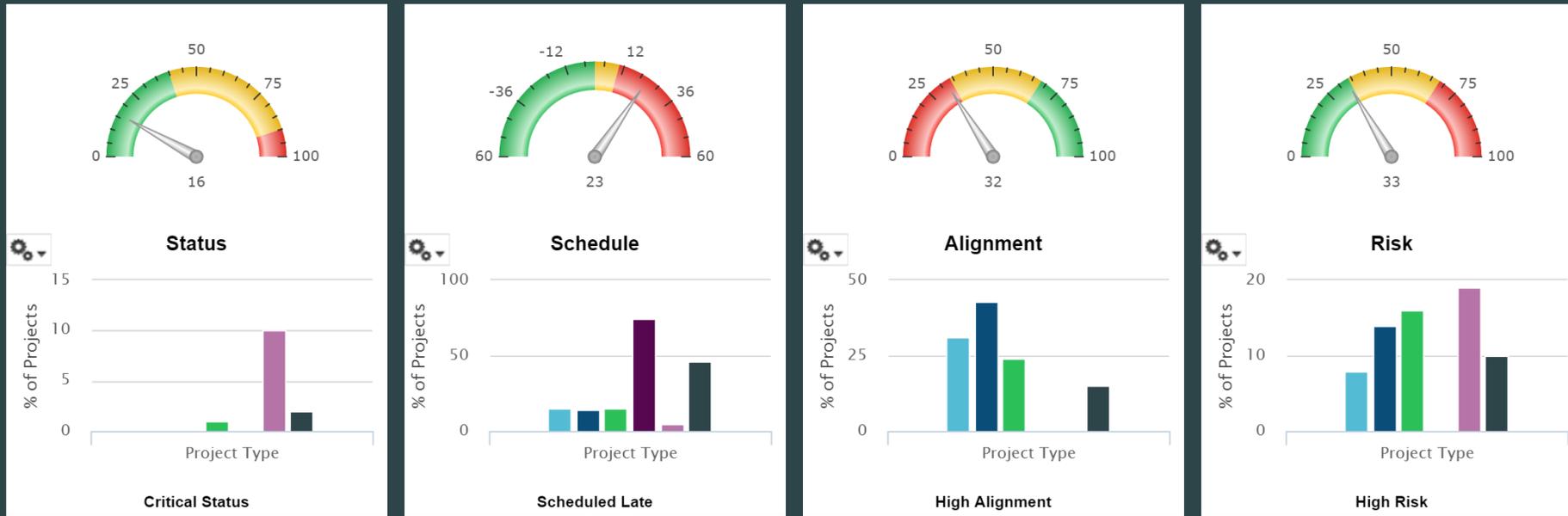
Status Report Listing

Project▲	Manager	Overall Status	Status Report Update	Report Date	Report Status	Schedule	Scope	Cost and Effort
A Fantastic Project	Thomas, Brian	⬇		4/30/15	Draft	⬇	⬇	⬆
A Fantastic Project	Thomas, Brian	⬇	We have run into challenges but are hoping to bring things around	3/27/15	Final	⬇	⬆	⬆
A Fantastic Project	Thomas, Brian	⬆	Project is underway and looking good	2/27/15	Final	⬆	⬆	⬆
Application Security Audit	Malone, Paula	⬇	The project is on track. There are some scope concerns regarding the applications which should be included under this audit. These are being addressed to the audit team for guidance.	4/15/16	Final	⬆	⬆	⬇
Automated Security Enhancements	Berks, Paul	⬆	Requirments gathering started	5/9/16	Final	⬆	⬆	⬆
Automated Security Enhancements	Berks, Paul	⬆	On track in all areas	5/2/16	Final	⬆	⬆	⬆
Change Mgt for Internal Portal	McCarthy, John	⬆	Thanks to the executive team intervening we finally have a scope of what needs to be updated and how to proceed.	6/13/16	Final	⬆	⬆	⬆
Change Mgt for Internal Portal	McCarthy, John	⬆	Getting a committee to decide which of the many suggestions to implement is going to take longer than the actual work. We are still on track, but if we can't come to some consensus, the project will not finish as planned.	6/8/16	Final	⬆	⬆	⬆
Change Mgt for Online Order Entry	McCarthy, John	⬆	Technical aspects of the project are progressing well; we are having some issues with the "people" side of the changes. The employees are reluctant to adapt to the new system.	4/11/16	Final	⬆	⬆	⬆
Change Mgt for Online Order Entry	McCarthy, John	⬆	On track, no issues. We may complete this project ahead of schedule	4/4/16	Final	⬆	⬆	⬆
Client Services Datamart	Martin, Paul	⬇	Technical issues affected planned recruitment and, therefore, the overall project scope. While this does not affect the completion of the project it may incur additional costs.	5/9/16	Final	⬆	⬇	⬇
Client Services Datamart	Martin, Paul	⬆	Project started without problems or issues that need to be addressed.	5/2/16	Final	⬆	⬆	⬆
Compliance Audit - Security	Sutherland, Joy	⬆	Audit teams are working with the employees gathering their evidence and documenting any findings.	6/3/16	Final	⬆	⬆	⬆
Compliance Audit - Security	Sutherland, Joy	⬆	Initial audit planning started. Gathering up the audit team and defining scope of audit.	5/27/16	Final	⬆	⬆	⬆
CRM Contact Center Development	Riviera, Alex	⬆	Authentication issues resolved. Project is going as planned.	4/18/16	Final	⬆	⬆	⬆
CRM Contact Center Development	Riviera, Alex	⬇	Working through issues regarding remote customer service agents authenticating into the system. Otherwise we are on time, on budget and on track.	4/4/16	Final	⬇	⬆	⬇
CRM Enhancements	Riviera, Alex	⬇	Initial planning phase has been completed. The project will be a week longer than planned since we uncovered additional features/functions that we can enable via a more extensive upgrade.	4/15/16	Final	⬇	⬇	⬇
CRM Enhancements	Riviera, Alex	⬆	Planning is done, design phase started. No additional changes, delays, or scope updates. New project deliverables, budget and scope have been approved.	4/8/16	Final	⬆	⬆	⬆
Data Warehouse Performance Tuning	Martin, Paul	⬇	Testing on development server is nearly complete. Users are happy with the results in this environment. Next steps are testing with a wider audience and exporting to a test environment.	4/20/16	Final	⬆	⬆	⬆
Data Warehouse Performance Tuning	Martin, Paul	⬇	The development system is on-line and available for user testing.	4/13/16	Final	⬆	⬆	⬇

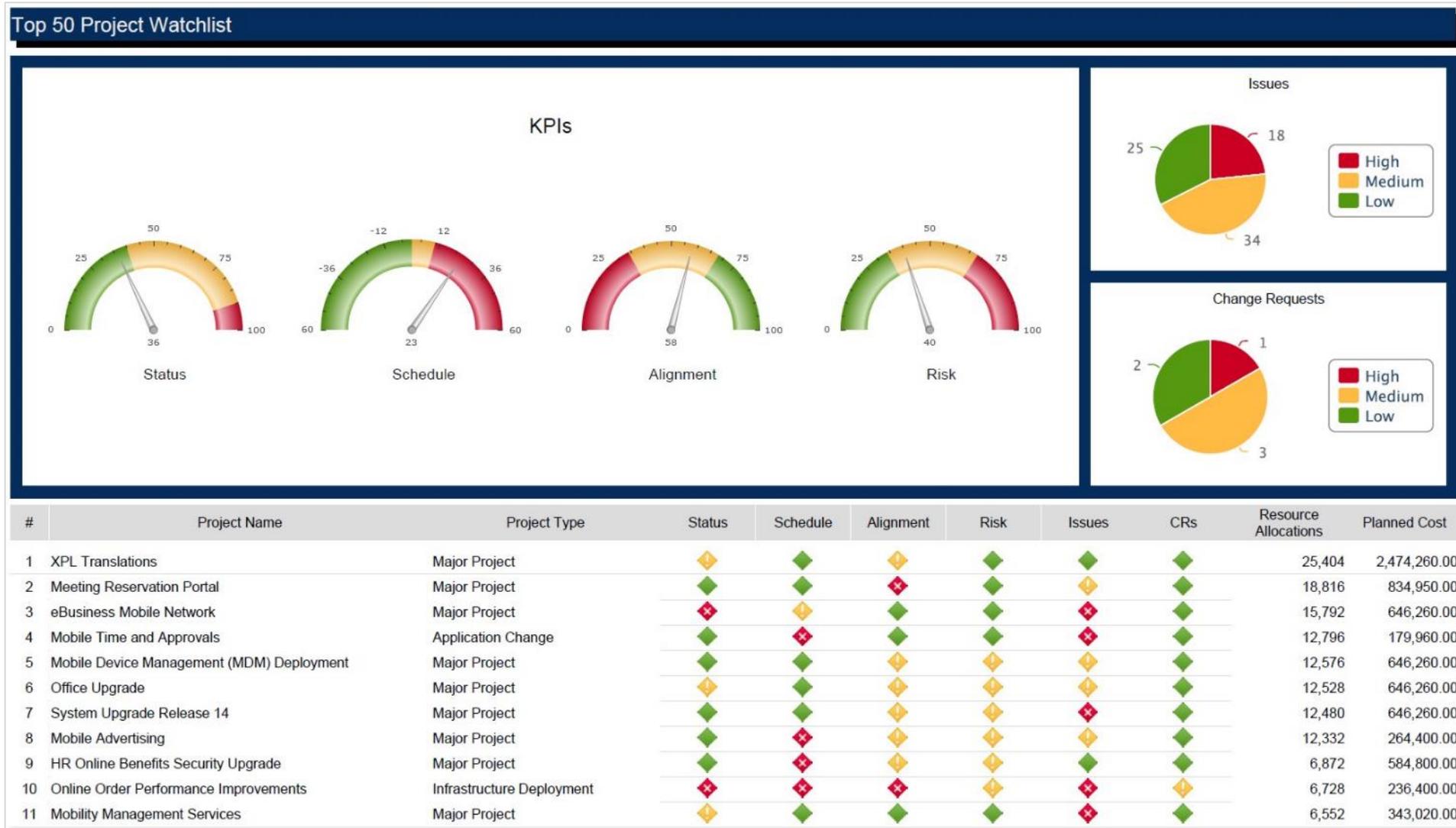
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# OOTB Metrics – Project/Program – Health

## KPIs by Project Type



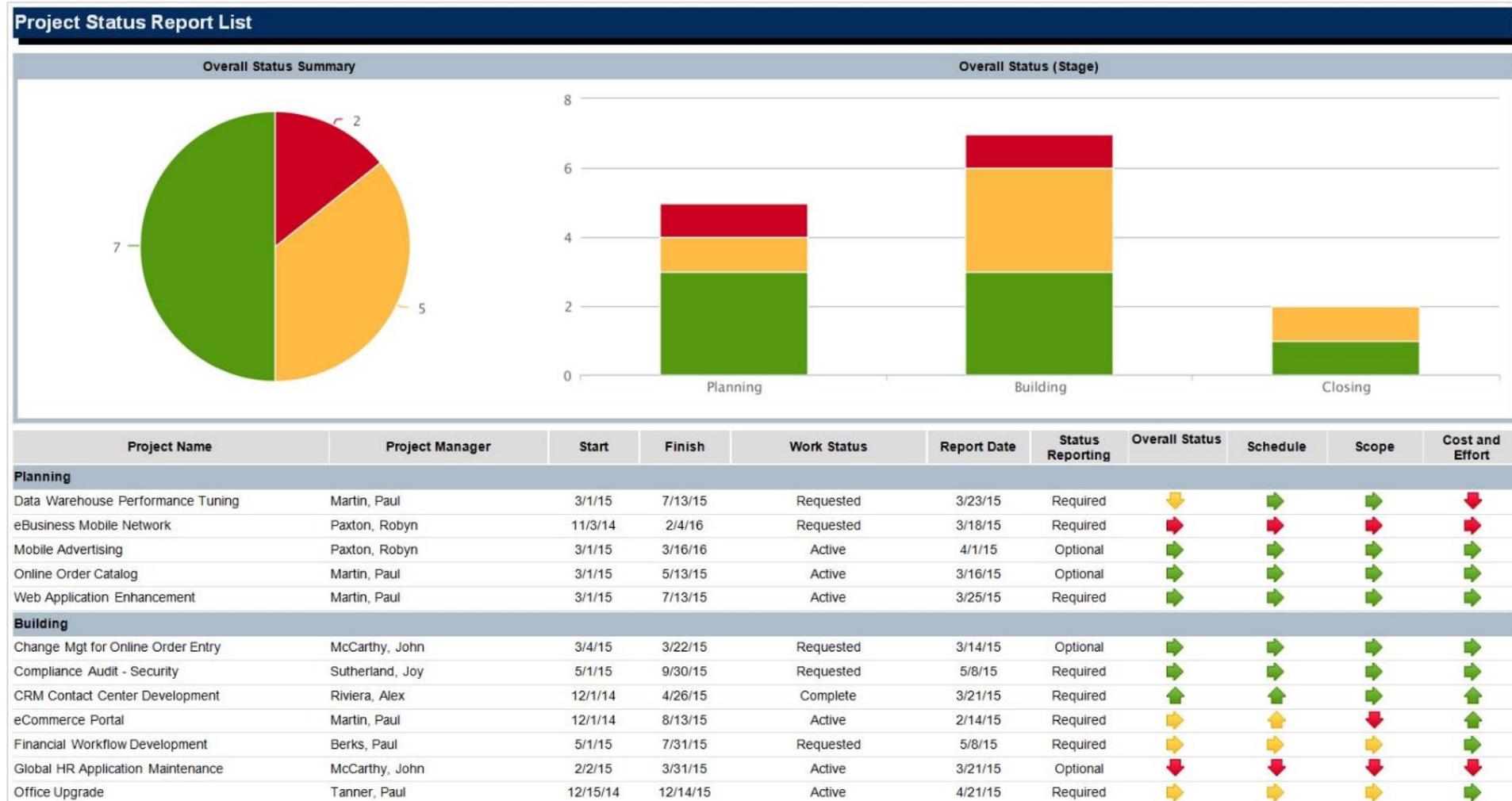
# OOTB Metrics – Project/Program – Health



# OOTB Metrics – Project/Program – Health

Project Storyboard: eCommerce Portal																										
Project Manager	Martin, Paul	Status Report Date	2/14/15	Labor Hours																						
Project Type	Major Project	Status	Approved	Baseline	2,256.20																					
Stage	Building	Progress	Started	Actuals	783.00																					
Project Dates			Status Report Indicators																							
	Start	Finish	Overall	Estimate To Complete	1,528.20																					
Plan	12/1/14	8/13/15	Schedule	Estimate At Completion	2,311.20																					
Baseline	12/1/14	8/11/15	Scope	EAC to Baseline Variance	55.00																					
Days Late	0	2	Cost and Effort	Remaining Allocation	745.20																					
				Allocation to ETC Variance	136.80																					
Project Objective			Key Accomplishments																							
Development of a new portal for all Online Client Services.			Key Accomplishments for this week: - Resource issues resolved - User acceptance test plan approved - End-to-end test plan approved - Pre-briefs for the Monthly Project Review completed by all team members - Online training solution chosen and team assembled																							
Status Report Update			Upcoming Activities																							
Resource issues all resolved and development is proceeding.  There are some scope concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. However, before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.			The following reviews are scheduled for next week:  - User acceptance test results - Change Requests - Monthly Project Review  The Configuration Control Board meeting is scheduled in two weeks.																							
Issues by Priority		Risks by Priority		Current Issues																						
				<table border="1"> <thead> <tr> <th>Issue</th> <th>Priority</th> <th>Status</th> <th>Target Resolution</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>Requirements are unclear</td> <td>High</td> <td>Open</td> <td>4/25/15</td> <td>Morris, Tom</td> </tr> <tr> <td>System Architecture is non-compliant</td> <td>High</td> <td>Open</td> <td>5/4/15</td> <td>Morris, Tom</td> </tr> <tr> <td>Accept all possible popular pay methods</td> <td>Medium</td> <td>Work in Progress</td> <td>5/18/15</td> <td>Martin, Paul</td> </tr> </tbody> </table>		Issue	Priority	Status	Target Resolution	Owner	Requirements are unclear	High	Open	4/25/15	Morris, Tom	System Architecture is non-compliant	High	Open	5/4/15	Morris, Tom	Accept all possible popular pay methods	Medium	Work in Progress	5/18/15	Martin, Paul	
Issue	Priority	Status	Target Resolution	Owner																						
Requirements are unclear	High	Open	4/25/15	Morris, Tom																						
System Architecture is non-compliant	High	Open	5/4/15	Morris, Tom																						
Accept all possible popular pay methods	Medium	Work in Progress	5/18/15	Martin, Paul																						
				Current Risks																						
				<table border="1"> <thead> <tr> <th>Risk</th> <th>Probability</th> <th>Impact</th> <th>Priority</th> <th>Status</th> <th>Target Resolution</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>Resource Availability</td> <td>High</td> <td>Medium</td> <td>High</td> <td>Open</td> <td>5/9/15</td> <td>Thompson, Peter</td> </tr> <tr> <td>Sponsorship Risk</td> <td>Medium</td> <td>Medium</td> <td>Medium</td> <td>Open</td> <td>3/27/15</td> <td>Granger, Paula</td> </tr> </tbody> </table>		Risk	Probability	Impact	Priority	Status	Target Resolution	Owner	Resource Availability	High	Medium	High	Open	5/9/15	Thompson, Peter	Sponsorship Risk	Medium	Medium	Medium	Open	3/27/15	Granger, Paula
Risk	Probability	Impact	Priority	Status	Target Resolution	Owner																				
Resource Availability	High	Medium	High	Open	5/9/15	Thompson, Peter																				
Sponsorship Risk	Medium	Medium	Medium	Open	3/27/15	Granger, Paula																				

# OOTB Metrics – Project/Program – Health



# OOTB Metrics – Project/Program – Health



# OOTB Metrics – Project/Program – Health

## Project Status Summary: eCommerce Portal



Stage: Building

Overall Status



Status Report Date:

3/17/2017

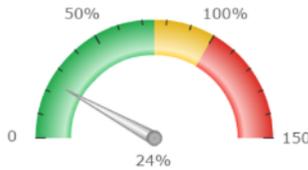
### Key Accomplishments

- Key accomplishments for this week:
- Resource issues resolved
  - User acceptance test plan approved

### Upcoming Activities

- The following reviews are scheduled for next week:
- User acceptance test results
  - Change Requests
  - Monthly Project Review

### Cost

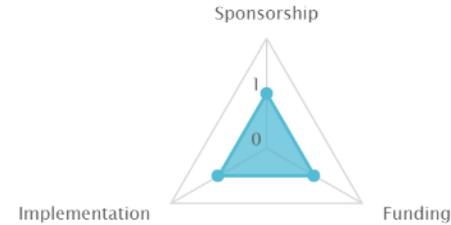


Displays burn rate against baseline

### Resources



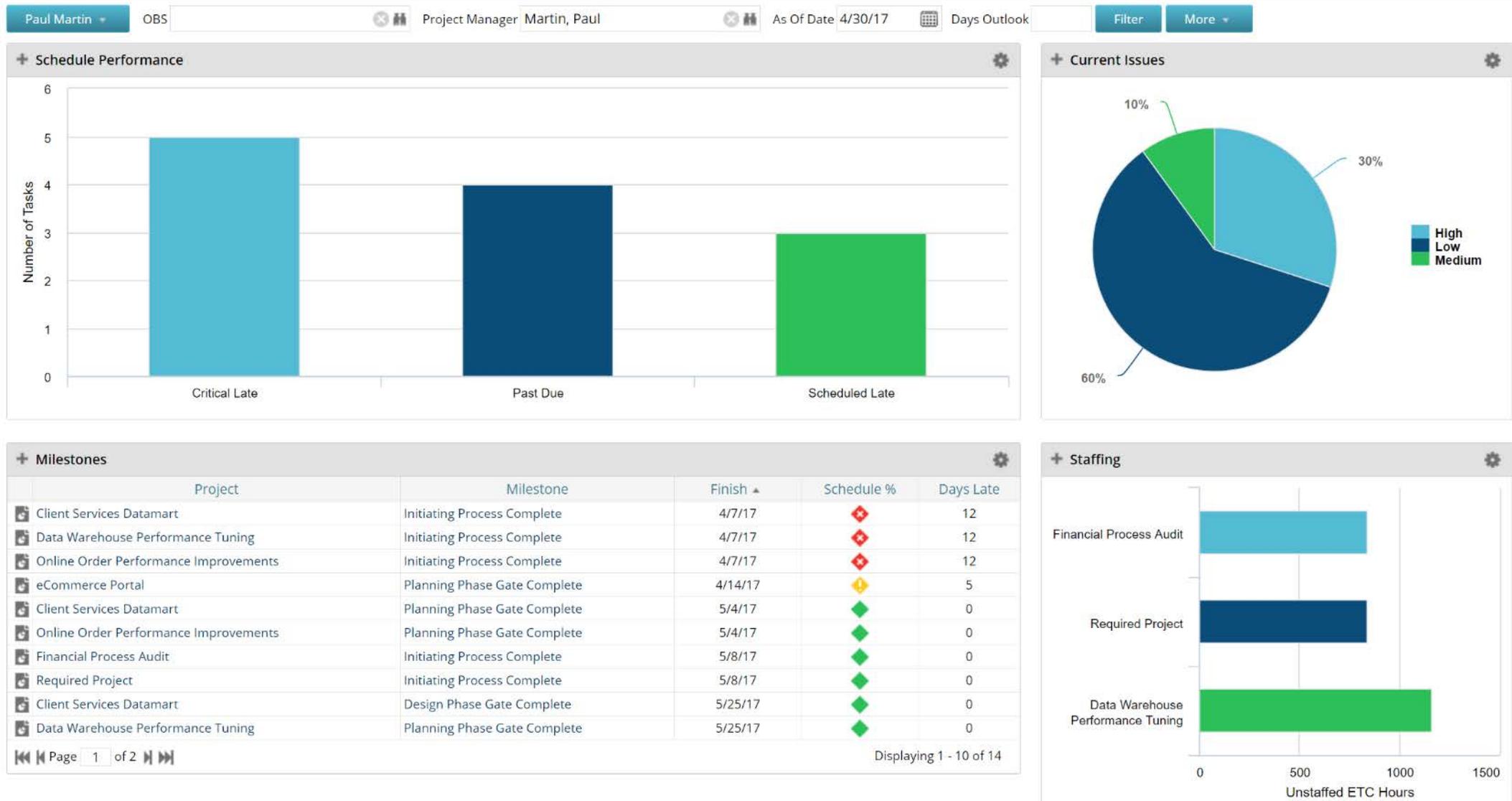
### Risk Map by Category



### Phase and Key Milestone Schedule

Phase/Key Milestone	Apr-17	May-17	Jun-17	Jul-17	Aug-17	Sep-17	Oct-17	Nov-17	Dec-17	Jan-18
Planning Phase Gate Complete	◆									
Design Phase	█									
Design Phase Gate Complete			◆							
Construction Phase				█						
Construction Phase Gate Complete						◆				
Deployment and Quality Phase						█				
Deployment Phase Gate Complete							◆			
Closing Phase							█			
Closing Phase Gate Complete								◆		

# OOTB Metrics – Project/Program – Health



# OOTB Metrics – Project/Program – Health

Current Issues Report

Issue	Priority	Status	Target	Owner
Advanced reporting requires newer java	Low	Work in Progress	5/12/17	Thompson, Peter
Enhancements could affect integration points	Low	Work in Progress	6/23/17	Thompson, Peter
Funding concerns	Low	Open	6/9/17	Morris, Tom
Interfaces to other systems	High	Work in Progress	5/31/17	Morris, Tom
Java scripts running on forms are causing performance issues	High	Work in Progress	5/11/17	Thompson, Peter
The email router configuration manager cannot retrieve user information	Medium	Work in Progress	5/19/17	Thompson, Peter
Users must always be assigned to a business unit	Medium	Work in Progress	5/22/17	Thompson, Peter

Current Risks Report

Risk	Probability	Impact	Priority	Status	Target	Owner
Enhancements could affect integration points	Low	Medium	Low	Open	6/18/17	Thompson, Peter
Interfaces to other systems	Medium	High	High	Open	8/14/17	Morris, Tom
New enhancements require additional licenses	High	Medium	Low	Open	6/25/17	Thompson, Peter

Project Status Report

Page 1 of 6

Project Name	Project Manager	Start	Finish	Work Status	Report Date	Schedule	Scope	Cost and Effort
IT Project Template	Fleming, Nicole	3/7/17	7/6/17	Requested	3/8/18	On Track		
Lean	Fleming, Nicole	3/22/17	4/13/17	Requested	3/24/17	On Track		
Marketing Campaign	Fleming, Nicole	3/21/17	7/7/17	Requested	3/24/17	On Track		
Monthly Newsletter	Fleming, Nicole	3/7/17	3/24/17	Requested	3/10/17	On Track		
Project Kickoff	Fleming, Nicole	3/7/17	8/22/17	Requested	3/10/17	On Track		
Project Template - no tasks	Fleming, Nicole	3/7/17	3/8/17	Requested	3/10/17	On Track		
Trade Show	Fleming, Nicole	3/7/17	9/20/17	Requested	3/10/17	On Track		
TV Project Kick-off	Fleming, Nicole	8/25/17	12/28/17	Requested	12/13/17			
SAP Implementation	Administrator, System	5/22/17	9/5/17	Requested	11/24/16	On Track		
B2B Enhancements	Robertson, Theresa	3/1/17	12/31/18	Requested	3/24/17	On Track	On Track	On Track
Industry Trade Show	Fleming, Nicole	3/20/17	2/28/18	Requested	3/24/17	On Track	On Track	Needs Help

Key Accomplishments

Page 1 of 10

Project	Key Accomplishments
2016 Winter Franchise Manager Release	
4G Upgrade Readiness	
5 Stage NPD - Methodology Template	
5555	
A Finance Process Change	
A Finance Process Change	
A Finance Process Change	Define phase is complete. Identified critical need of documentation and updated plan. Have engaged SME base of people wanting and motivated to change practices for improved processes
A Finance Process Change	Define phase is complete. Identified critical need of documentation and updated plan. Have engaged SME base of people wanting and motivated to change practices for improved processes
AC Core Digital Rollout	
AC SAFe Implementation	
API Technical Debt	
Agile Initiative Template	
Agile Time Tracking Template	
Analytics Delivery	

# OOTB Metrics – Project/Program – Health

<b>Budget</b> \$11,031,760	<b>Actuals</b> \$758,250	<b>Forecast</b> \$49,650,875	<b>Variance</b> \$(38,619,115)
<b>Projects Completed</b> 6	<b>Projects Started</b> 91	<b>Contractors (FTEs)</b> 16	<b>Employees (FTEs)</b> 229

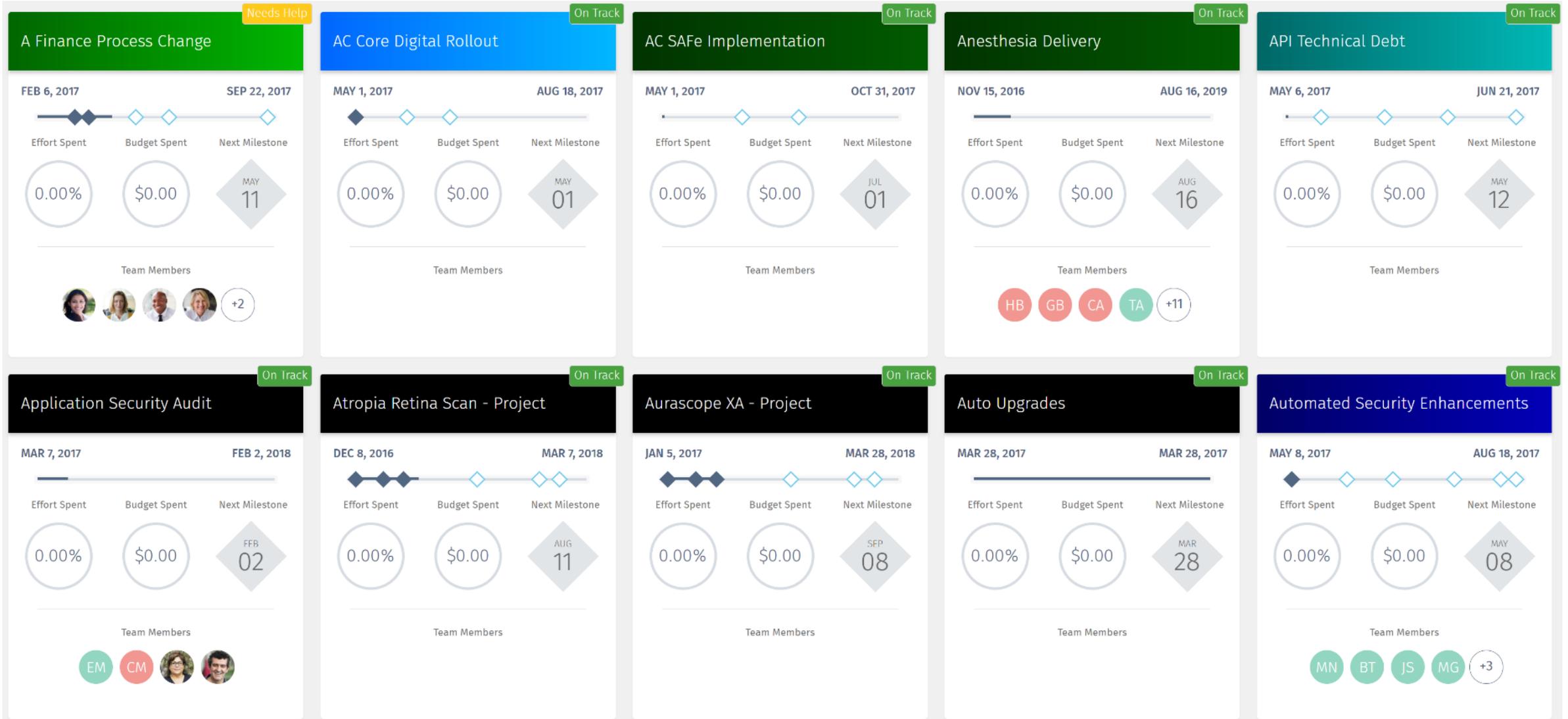
Populate Project Manager?  
 Project Manager  
 Available: 31      Selected: 31  

- ✕ Administrator, System | admin
- ✕ Alvarez, Corine | corineAlvarez
- ✕ Angelo, Michael | michaelAngelo
- ✕ Beck, Jackson | JacksonBeck
- ✕ Berg, Kathryn | kathrynBerg
- ✕ Berks, Paul | paulBerks
- ✕ Brooks, Emma | emmaBrooks
- ✕ Core, Elizabeth | elizabethCore
- ✕ Craig, Allen | allenCraig

## Top 10 Projects

#	Project Name	Project Type	Status	Schedule	Alignment	Risk	Issues	CRs	Resource Allocations	Planned Cost
1	<a href="#">XPL Translations</a>	Major Project	⬜	🟩	⚠️	⬜	🟩	🟩	48,880	71,600.00
2	<a href="#">Critical Care Vent - home version</a>	Major Project	⬜	🟩	🟩	⚠️	🟩	🟩	48,828	0.00
3	<a href="#">Web Based Trading</a>	Major Project	⬜	🟩	⚠️	🟩	🟩	🟩	39,120	0.00
4	<a href="#">Personalized online shopping experience</a>	Application Change	🟩	🔴	⚠️	🟩	🟩	🟩	33,790	400,000.00
5	<a href="#">Web Application Enhancement</a>	Major Project	🟩	🔴	⚠️	🔴	⚠️	🔴	26,281	244,000.00
6	<a href="#">Minimal Online Shopping Site</a>	Major Project	⚠️	🔴	⚠️	🟩	🟩	🟩	23,386	400,000.00
7	<a href="#">Portfolio Initiative</a>	Major Project	🟩	🔴	⚠️	⚠️	🟩	🟩	19,190	192,720.00
8	<a href="#">Collaboration Initiative</a>	Major Project	🟩	🔴	⚠️	⚠️	🟩	🟩	17,558	192,720.00
9	<a href="#">Maintain legacy purchasing system</a>	Major Project	🟩	🔴	⚠️	🟩	🟩	🟩	16,605	600,000.00
10	<a href="#">Modernize customer service portal</a>	Major Project	🟩	🔴	⚠️	⬜	🟩	🟩	15,670	750,000.00

# OOTB Metrics – Project/Program – Health



# OOTB Metrics – Project/Program - Financial

**Project Costs by Resource**

Resource:  Resource Type: All  
 Is Role: All Employment Type: All

Filter Show All Save Filter Clear

Project	Team	Resource/Role	Project Role	Resource Type	Employment Type	BAC Cost	Actual Cost (ACWP)	ETC Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %
Application Security Audit		Business Analyst	Business Analyst	Labor		305,920	0	305,920	305,920	0	◆
Application Security Audit	Malone, Paula			Labor	Employee	267,680	0	267,680	267,680	0	◆
Application Security Audit	Moreau, Erin		Test Engineer	Labor	Employee	248,560	0	248,560	248,560	0	◆
Application Security Audit	Morris, Tom		Architect	Labor	Employee	15,045	0	15,045	15,045	0	◆
Application Security Audit	Murphy, Carolyn		Developer	Labor	Employee	305,920	0	305,920	305,920	0	◆
<b>Total</b>						<b>1,143,125</b>	<b>0</b>	<b>1,143,125</b>	<b>1,143,125</b>	<b>0</b>	

Displaying 1 - 5 of 5

**Project Costs by Task**

Task Status: All

Filter Show All Save Filter Clear

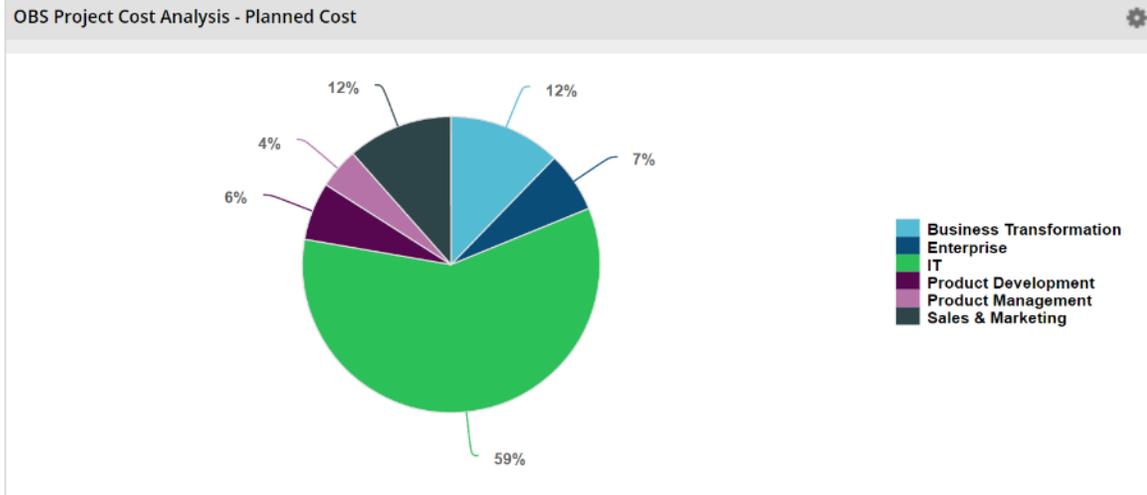
Project	Phase	Task	Status	Start	Finish	BAC Cost	Actual Cost (ACWP)	ETC Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %
Application Security Audit	Application Security Audit	Application Security Audit	Not Started	4/6/15	3/3/16	1,143,125	0	1,143,125	1,143,125	0	◆
<b>Total</b>						<b>1,143,125</b>	<b>0</b>	<b>1,143,125</b>	<b>1,143,125</b>	<b>0</b>	

# OOTB Metrics – Financial

Financial Budget vs. Forecast by Period													
Cost Type / Transaction Class	Total	2015-01	2015-02	2015-03	2015-04	2015-05	2015-06	2015-07	2015-08	2015-09	2015-10	2015-11	2015-12
<b>Capital</b>													
<b>External Labor</b>													
Budget	1,215,139	3,644	20,800	19,245	17,990	21,340	13,200	20,800	40,000	151,960	194,320	296,520	415,320
Forecast	1,190,339	3,644	20,800	19,245	17,990	21,340	1,200	15,300	32,700	151,960	194,320	296,520	415,320
Variance	24,800	0	0	0	0	0	12,000	5,500	7,300	0	0	0	0
<b>Internal Labor</b>													
Budget	2,932,000	201,099	188,302	168,260	172,448	197,771	157,200	105,920	154,000	444,680	297,800	467,080	377,440
Forecast	2,933,787	201,099	188,302	199,260	196,435	197,771	155,200	82,300	126,420	444,680	297,800	467,080	377,440
Variance	-1,787	0	0	-31,000	-23,987	0	2,000	23,620	27,580	0	0	0	0
<b>Budget</b>	<b>4,147,139</b>	<b>204,743</b>	<b>209,102</b>	<b>187,505</b>	<b>190,438</b>	<b>219,111</b>	<b>170,400</b>	<b>126,720</b>	<b>194,000</b>	<b>596,640</b>	<b>492,120</b>	<b>763,600</b>	<b>792,760</b>
<b>Forecast</b>	<b>4,124,126</b>	<b>204,743</b>	<b>209,102</b>	<b>218,505</b>	<b>214,425</b>	<b>219,111</b>	<b>156,400</b>	<b>97,600</b>	<b>159,120</b>	<b>596,640</b>	<b>492,120</b>	<b>763,600</b>	<b>792,760</b>
<b>Variance</b>	<b>23,013</b>	<b>0</b>	<b>0</b>	<b>-31,000</b>	<b>-23,987</b>	<b>0</b>	<b>14,000</b>	<b>29,120</b>	<b>34,880</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Operating</b>													
<b>External Labor</b>													
Budget	326,280	1,940	9,022	8,753	6,465	11,180	2,400	12,800	0	13,600	65,600	112,600	81,920
Forecast	351,096	1,940	9,022	8,753	6,465	11,180	14,400	19,216	6,400	13,600	65,600	112,600	81,920
Variance	-24,816	0	0	0	0	0	-12,000	-6,416	-6,400	0	0	0	0
<b>Internal Labor</b>													
Budget	2,743,611	156,720	110,833	98,431	106,500	77,927	31,200	134,400	94,480	471,660	586,220	482,480	392,760
Forecast	2,646,302	156,720	110,833	98,431	106,500	77,927	62,400	75,291	25,080	471,660	586,220	482,480	392,760
Variance	97,309	0	0	0	0	0	-31,200	59,109	69,400	0	0	0	0
<b>Budget</b>	<b>2,482,120</b>	<b>158,660</b>	<b>119,855</b>	<b>107,184</b>	<b>112,965</b>	<b>89,107</b>	<b>33,600</b>	<b>147,200</b>	<b>94,480</b>	<b>485,260</b>	<b>651,820</b>	<b>595,080</b>	<b>474,680</b>
<b>Forecast</b>	<b>2,409,627</b>	<b>158,660</b>	<b>119,855</b>	<b>107,184</b>	<b>112,965</b>	<b>89,107</b>	<b>76,800</b>	<b>94,507</b>	<b>31,480</b>	<b>485,260</b>	<b>651,820</b>	<b>595,080</b>	<b>474,680</b>
<b>Variance</b>	<b>72,493</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>-43,200</b>	<b>52,693</b>	<b>63,000</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Grand Total</b>													
Budget	7,217,030	363,403	328,957	294,689	303,403	308,218	204,000	273,920	288,480	1,081,900	1,143,940	1,358,680	1,267,440
Forecast	7,121,524	363,403	328,957	325,689	327,390	308,218	233,200	192,107	190,600	1,081,900	1,143,940	1,358,680	1,267,440
Variance	95,506	0	0	-31,000	-23,987	0	-29,200	81,813	97,880	0	0	0	0

# OOTB Metrics – Financial

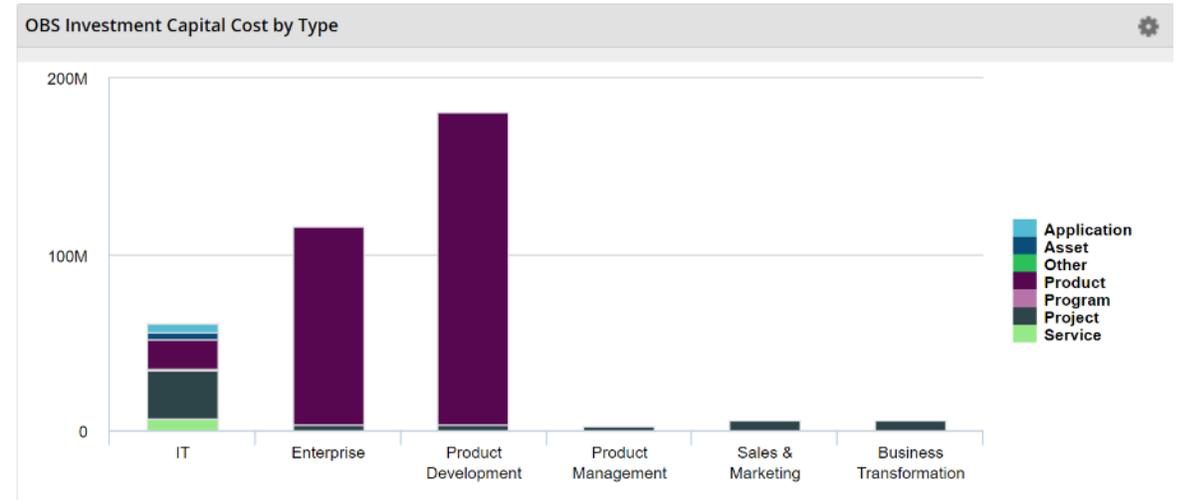
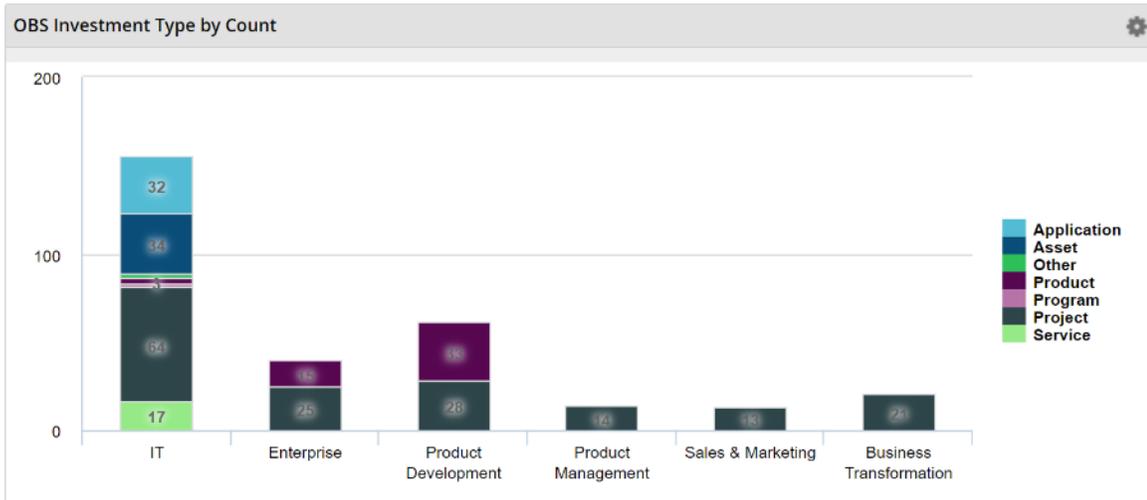
Select OBS By **OBS Type**  OBS Unit  (or) OBS Type **Corporate Department OBS**



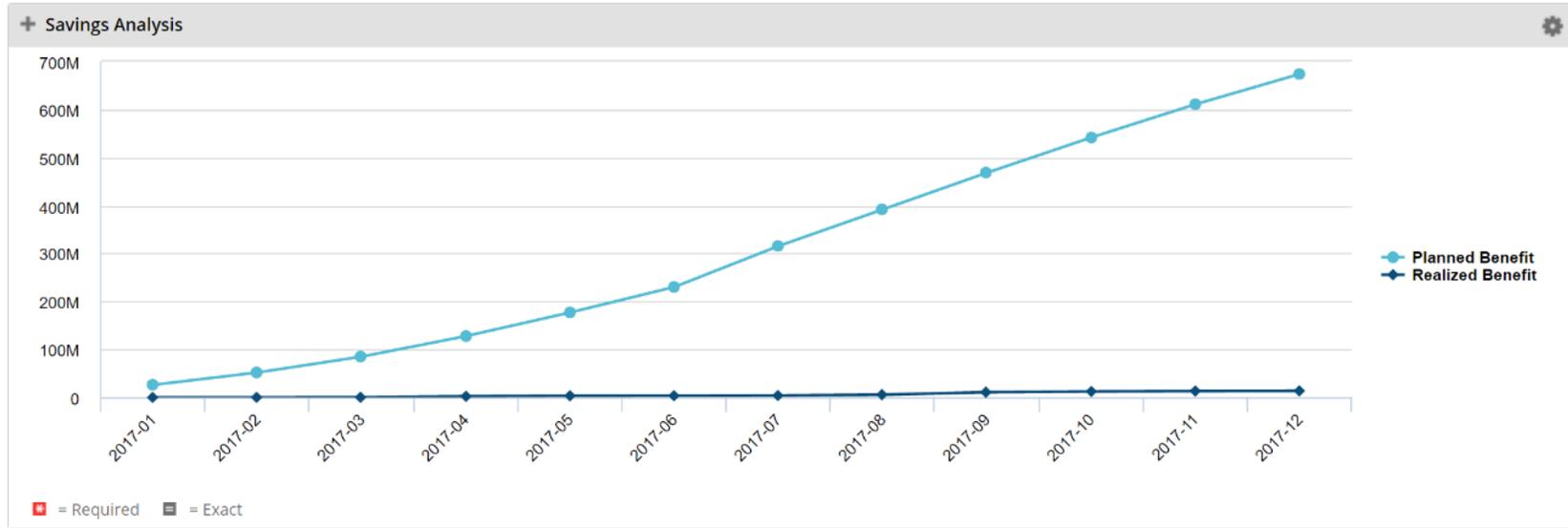
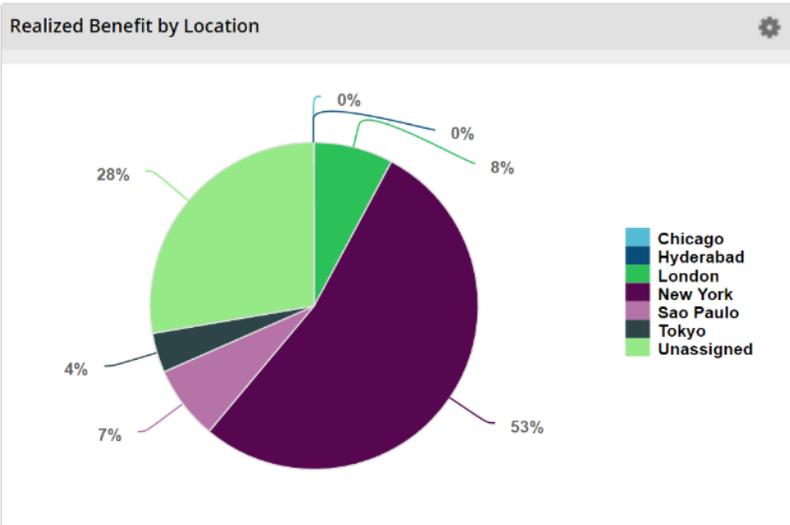
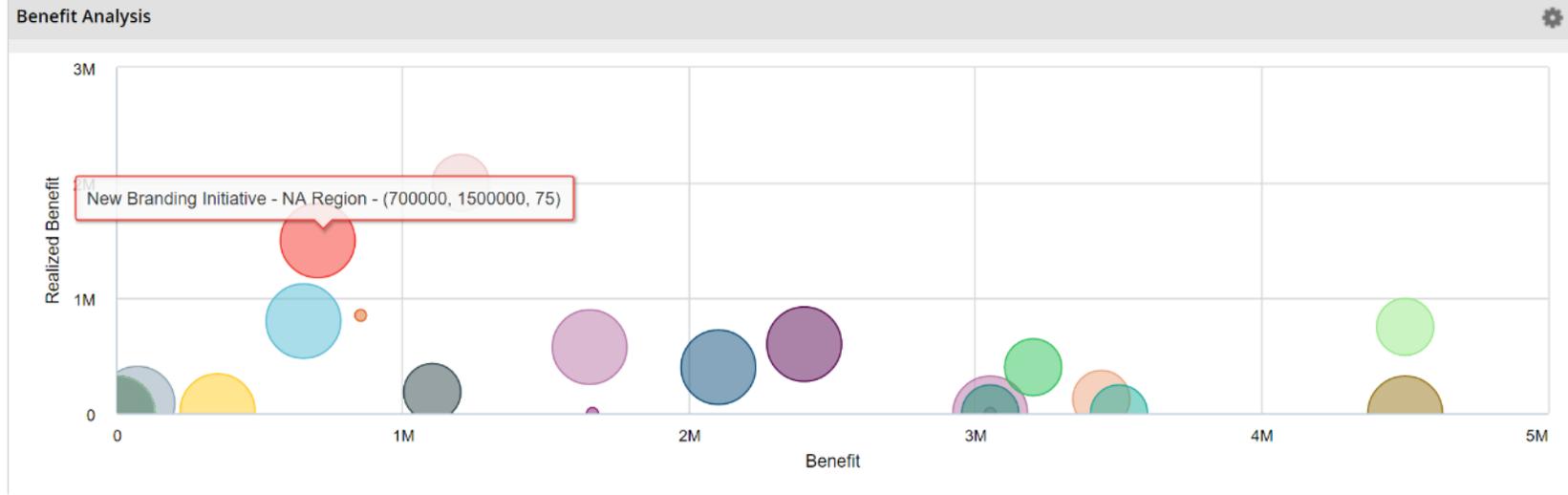
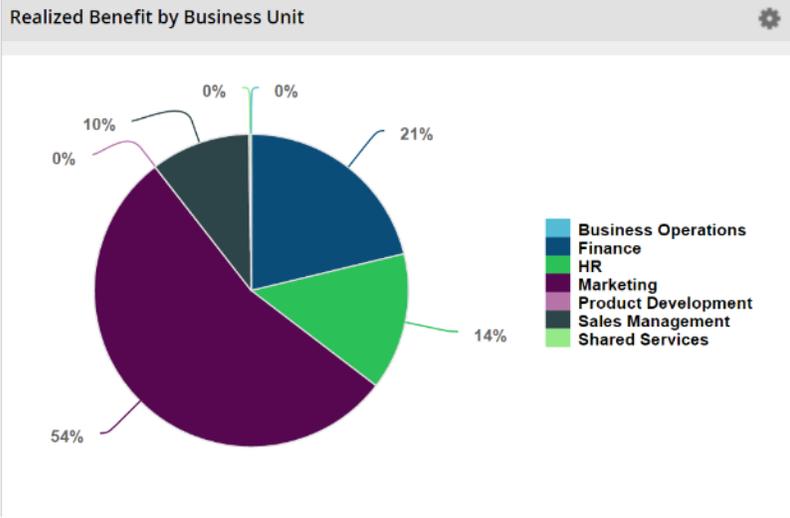
### OBS Project Summary

OBS / Project	Capital Cost	Operating Cost	Total Cost	Actual Cost	Business Alignment	Risk
Business Transformation	935,000	4,819,656	5,754,656	0	⬜	⚠
Enterprise	450,000	2,660,096	3,110,096	0	⚠	⚠
IT	12,030,100	15,728,115	27,758,215	447,573	⚠	⚠
Product Development	1,047,200	1,937,600	2,984,800	0	⬜	⚠
Product Management	713,440	1,366,600	2,080,040	114,480	⚠	⬜
Sales & Marketing	61,000	5,358,028	5,419,028	196,197	⬜	⚠

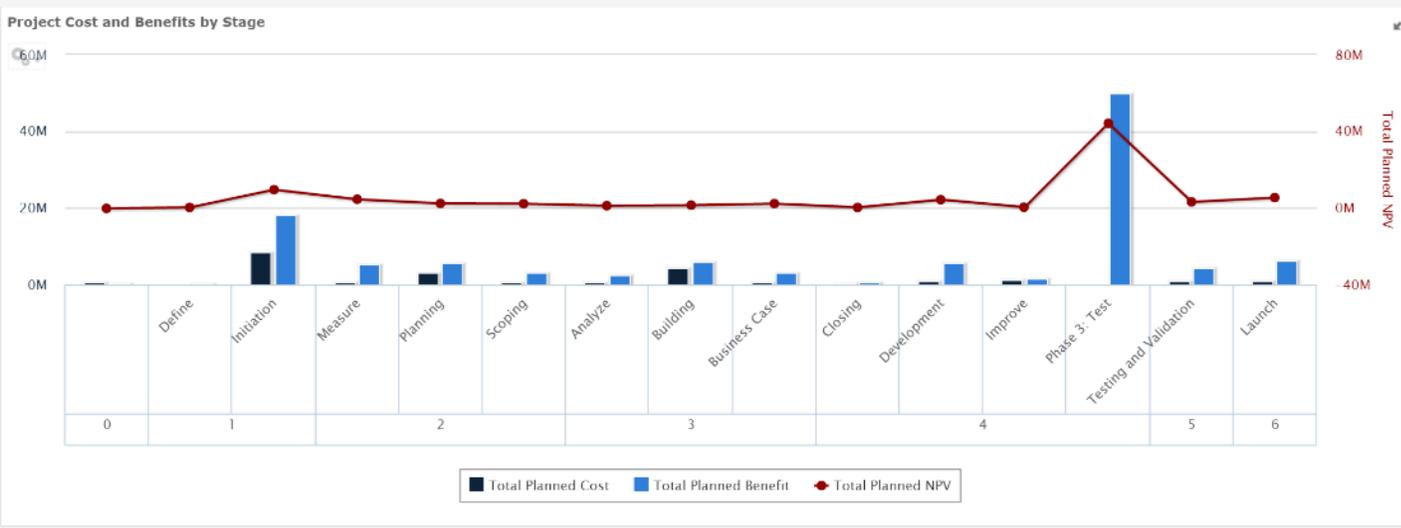
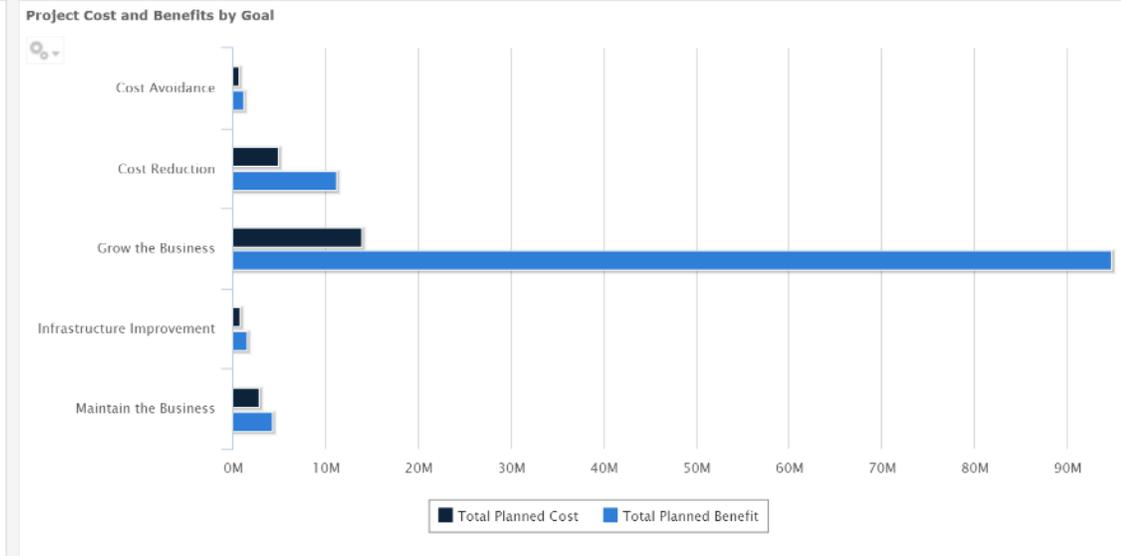
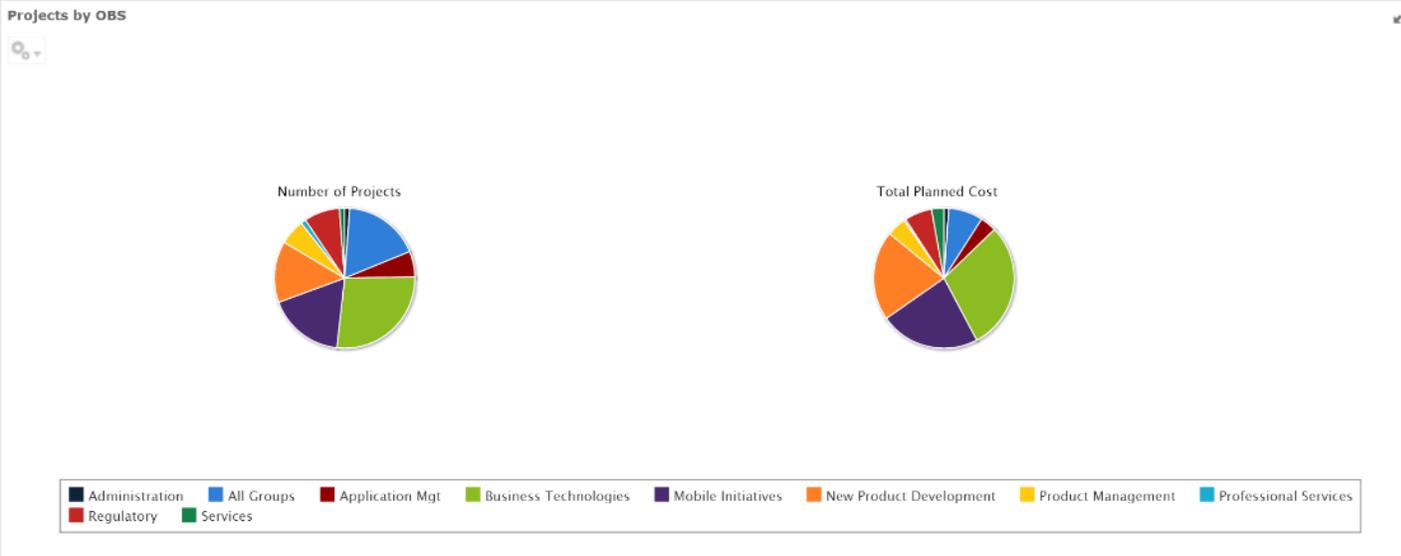
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# OOTB Metrics – Financial



# OOTB Metrics – Financial



### Projects by Goal Report

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Projects by Goal					
	Project Name	Business Alignment	Risk	Total Planned Cost	Total Planned Benefit
<b>Cost Avoidance</b>					
	Compliance Audit - Security	71	5	250,000.00	300,000.00
	PCI Remediation	71	36	0.00	0.00
	Logistics Management	62	32	343,020.00	600,000.00
	Financial Workflow Development	71	5	120,000.00	275,000.00
	<b>Cost Avoidance Totals</b>	<b>4</b>		<b>713,020.00</b>	<b>1,175,000.00</b>
<b>Cost Reduction</b>					
	eCommerce Portal	75	14	417,000.00	600,000.00
	Return Authorization	71	50	258,720.00	1,250,000.00
	Saved Orders	67	68	183,168.00	0.00
	Order Confirmations	62	55	192,400.00	1,250,000.00

# OOTB Metrics – Project/Program - Schedule

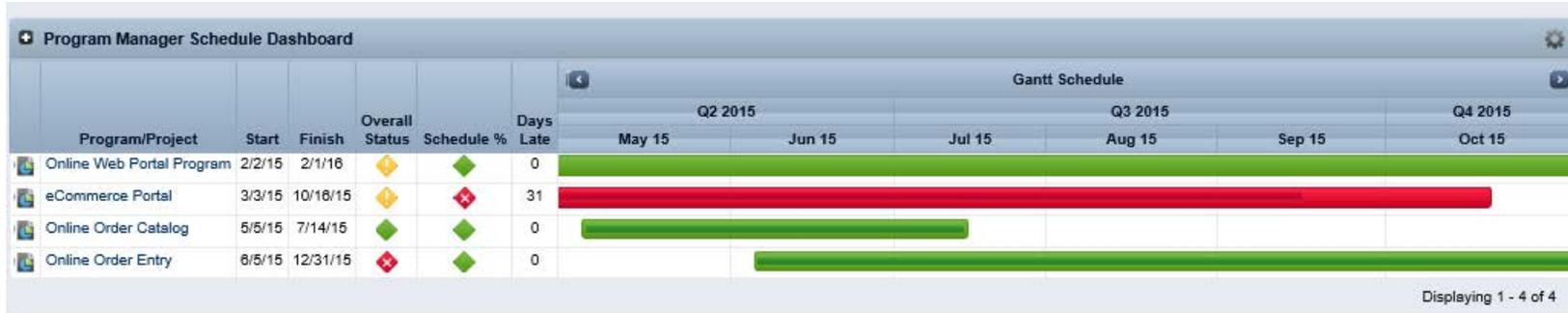
Labor Effort	
Total Effort	7,748.30
Actuals	0.00
Estimate to Complete	7,748.30
Baseline	7,748.30
Baseline Variance	0.00
Remaining Allocation	7,739.98
Allocation Variance	-8.32
Work Effort = Hours	



Late Tasks and Milestones							Gantt Schedule					
Task	Task ID	Finish	Status	Schedule %	Days Late	June 2015				July 2015		
						6/8/15	6/15/15	6/22/15	6/29/15	7/6/15	7/13/15	
Initiating Process Complete	LM.000.100	3/2/15	Not Started	◆	35							
Define Scope Change and Control Process	LM.001.010	3/6/15	Not Started	◆	35							
Risk Response and Mitigation Plan	LM.001.030	3/20/15	Started	◆	35							
Planning Phase Gate Complete	LM.001.100	3/23/15	Not Started	◆	35							
Requirements Definition	LM.002.010	3/27/15	Not Started	◆	35							
Functional and Technical Design	LM.002.020	4/10/15	Started	◆	35							
Design Phase Gate Complete	LM.002.100	4/13/15	Not Started	◆	35							
Database Development	LM.003.010	4/24/15	Started	◆	35							
User Interface Development	LM.003.020	5/1/15	Not Started	◆	35							
Unit and Performance Testing	LM.003.030	5/22/15	Started	◆	35							
Construction Phase Gate Complete	LM.003.100	5/25/15	Not Started	◆	35							
Functional and System Testing	LM.004.010	6/12/15	Not Started	◆	35							
Usability and User Acceptance Testing	LM.004.020	7/28/15	Not Started	◆	60							
Deployment Phase Gate Complete	LM.004.100	7/29/15	Not Started	◆	58							
Lessons Learned	LM.005.010	8/4/15	Not Started	◆	60							
Closing Phase Gate Complete	LM.005.020	8/4/15	Not Started	◆	60							

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# OOTB Metrics – Project/Program – Program



**Overview: Program Dashboard**

Program: Online Web Portal Program  Filter More

**Program Manager Cost Dashboard**

Project	Risk	Stage	Finish	Planned ROI	Planned IRR	BAC Cost	Actual Cost (ACWP)	EAC Cost	Projected Cost Variance	Projected Cost Variance %	Cost Drill Down
eCommerce Portal	Green Diamond	Building	10/16/15	42.85%	11.12%	397,400	43,000	370,601	(26,799)	Green Diamond	↔
Online Order Catalog	Yellow Diamond	Planning	7/14/15	41.22%	38.56%	246,650	0	246,650	0	Green Diamond	↔
Online Order Entry	Red Diamond	Initiation	12/31/15	38.29%	67.57%	325,500	0	325,500	0	Green Diamond	↔
<b>Project</b>				<b>40.79%</b>	<b>38.42%</b>	<b>969,550</b>	<b>43,000</b>	<b>942,751</b>	<b>(26,799)</b>		
<b>Program</b>								<b>990,000</b>			
<b>Variance</b>								<b>47,249</b>			

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■ = Required

**Program: Online Web Portal Program - Dashboard**

**Cost and Schedule Overview**

Project	BAC Cost	Actual Cost (ACWP)	EAC Cost	Projected Cost Variance	Projected Cost Variance %	Start	Finish	Baseline Finish	Schedule %	Days Late	Risk	High Priority Risks	High Priority Issues	High Priority Changes
eCommerce Portal	397,400	43,000	370,601	(26,799)	Green Diamond	3/3/15	10/16/15	9/15/15	Red Diamond	31	Yellow Diamond	1	1	
Online Order Catalog	246,650	0	246,650	0	Green Diamond	5/5/15	7/14/15	7/14/15	Green Diamond	0	Yellow Diamond			
Online Order Entry	325,500	0	325,500	0	Green Diamond	6/5/15	12/31/15	12/31/15	Green Diamond	0	Red Diamond	3		
<b>Project</b>	<b>969,550</b>	<b>43,000</b>	<b>942,751</b>	<b>(26,799)</b>								<b>4</b>	<b>1</b>	
<b>Program</b>			<b>990,000</b>											
<b>Variance</b>			<b>47,249</b>											

Displaying 1 - 3 of 3

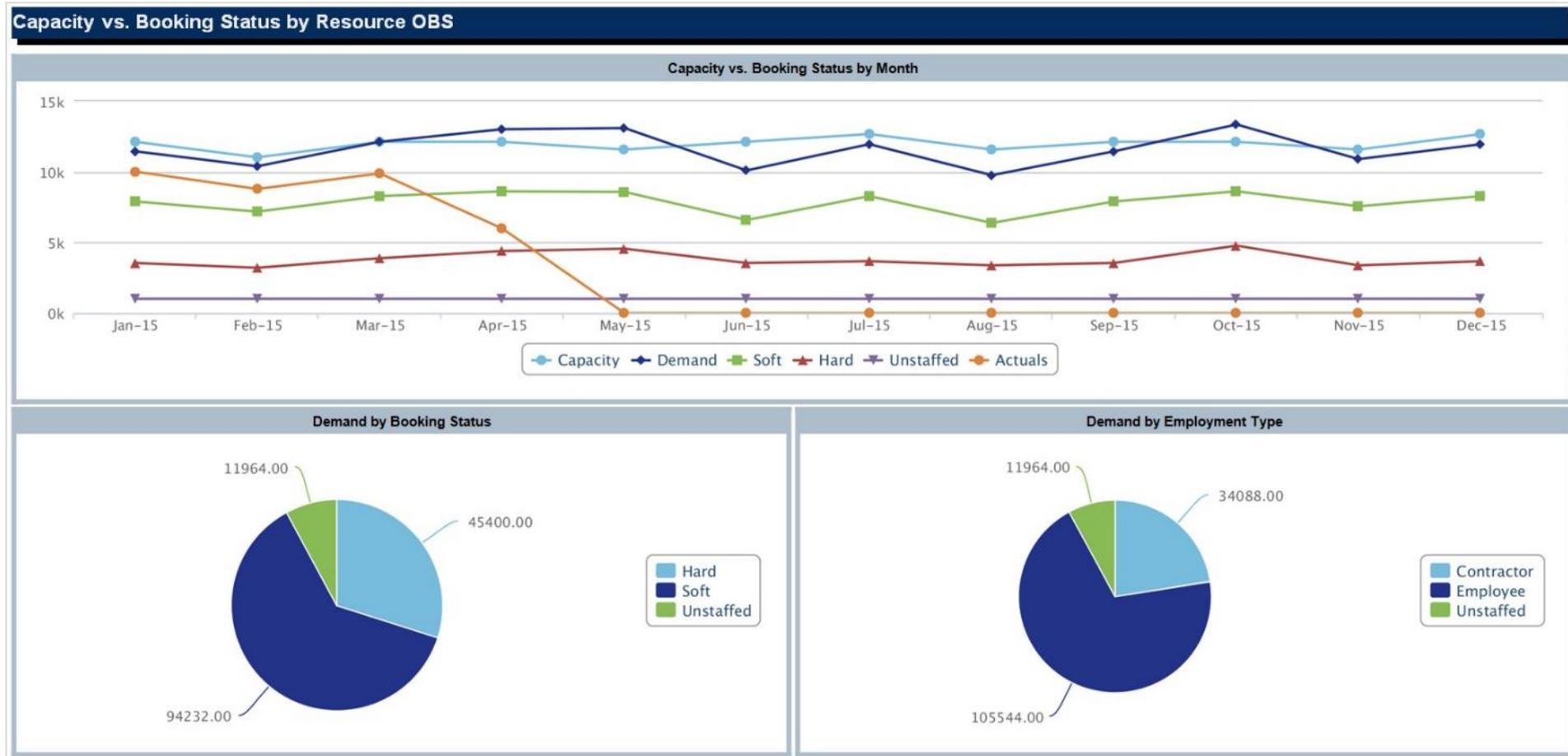
# OOTB Metrics – Resource

OBS Resource Aggregation			Allocation					
OBS			Jun 15	Jul 15	Aug 15	Sep 15	Oct 15	Nov 15
All Groups								
Business Transformation								
External								
Offshore Development								
Onshore Development								
Internal								
Development								
Operations								
Shared Services								
New Product Development								
Engineering								
Marketing								
Product Management								
NPN								
Professional Services								
Consulting Services								
Implementation Services								
Outsourcing								

OBS Resource Aggregation			Allocation					
OBS			Jan 16	Feb 16	Mar 16	Apr 16	May 16	Jun 16
Rego Consulting		Capacity	56.00	56.00	56.00	56.00	56.00	56.00
		Allocation	86.44	81.73	72.28	64.28	48.77	48.20
		Hard-booked Staff	1.44	1.45	1.45	0.97	0.95	0.95
		Soft-booked Staff	85.00	80.28	70.83	63.30	47.82	47.25
		Unfilled Roles						
		Capacity - Allocation	(30.44)	(25.73)	(16.28)	(8.28)	7.23	7.80
		Actuals	59.52	59.52				
Dept1		Capacity	14.00	14.00	14.00	14.00	14.00	14.00
		Allocation	31.68	29.69	27.30	24.46	19.13	18.80
		Hard-booked Staff	1.10	1.10	1.10	0.62	0.60	0.60
		Soft-booked Staff	30.58	28.59	26.20	23.84	18.53	18.20
		Unfilled Roles						
		Capacity - Allocation	(17.68)	(15.69)	(13.30)	(10.46)	(5.13)	(4.80)
		Actuals						
Dept2		Capacity	3.00	3.00	3.00	3.00	3.00	3.00
		Allocation	2.05	2.05	2.05	2.05	2.05	2.05
		Hard-booked Staff	0.05	0.05	0.05	0.05	0.05	0.05
		Soft-booked Staff	2.00	2.00	2.00	2.00	2.00	2.00
		Unfilled Roles						
		Capacity - Allocation	0.95	0.95	0.95	0.95	0.95	0.95
		Actuals						

# OOTB Metrics – Resource



# OOTB Metrics – Resource

Capacity vs. Demand by Role														
Role		Allocation by Month (Hours)												Total
		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	
Architect	Capacity	1,408.00	1,280.00	1,408.00	1,408.00	1,344.00	1,408.00	1,472.00	1,344.00	1,408.00	1,408.00	1,344.00	1,472.00	16,704.00
	Demand	910.80	871.42	1,667.75	1,290.20	951.40	1,200.80	1,472.00	867.30	934.72	940.81	788.41	733.20	12,628.80
	Remaining Capacity	497.20	408.58	-259.75	117.80	392.60	207.20	0.00	476.70	473.28	467.19	555.59	738.80	4,075.20
Business Analyst	Capacity	1,584.00	1,440.00	1,584.00	1,584.00	1,512.00	1,584.00	1,656.00	1,512.00	1,584.00	1,584.00	1,512.00	1,656.00	18,792.00
	Demand	738.80	688.00	1,603.24	1,341.80	1,593.40	1,734.80	1,241.20	926.10	904.11	912.81	703.40	1,641.20	14,028.85
	Remaining Capacity	845.20	752.00	-19.24	242.20	-81.40	-150.80	414.80	585.90	679.89	671.19	808.60	14.80	4,763.15
DBA	Capacity	528.00	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	552.00	6,264.00
	Demand	526.40	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	27.60	5,738.00
	Remaining Capacity	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	524.40	526.00
Developer	Capacity	1,936.00	1,760.00	1,936.00	1,936.00	1,848.00	1,936.00	2,024.00	1,848.00	1,936.00	1,936.00	1,848.00	2,024.00	22,968.00
	Demand	1,631.20	1,588.96	1,497.64	2,705.20	2,251.61	1,705.19	1,649.80	894.60	902.76	858.19	1,822.60	714.80	18,222.55
	Remaining Capacity	304.80	171.04	438.36	-769.20	-403.61	230.81	374.20	953.40	1,033.24	1,077.81	25.40	1,309.20	4,745.45
Network Engineer	Capacity	1,232.00	1,120.00	1,232.00	1,232.00	1,176.00	1,232.00	1,288.00	1,176.00	1,232.00	1,232.00	1,176.00	1,288.00	14,616.00
	Demand	377.61	335.04	435.86	344.69	938.80	830.60	713.39	494.90	499.60	375.60	208.81	1,202.40	6,757.31
	Remaining Capacity	854.39	784.96	796.14	887.31	237.20	401.40	574.61	681.10	732.40	856.40	967.19	85.60	7,858.69
Project Manager	Capacity	2,288.00	2,080.00	2,288.00	2,288.00	2,184.00	2,288.00	2,392.00	2,184.00	2,288.00	2,288.00	2,184.00	2,392.00	27,144.00
	Demand	1,560.03	1,567.04	2,520.10	2,200.73	2,226.01	3,806.99	3,914.00	2,979.20	3,064.00	3,008.01	1,944.03	1,736.00	30,526.14
	Remaining Capacity	727.97	512.96	-232.10	87.27	-42.01	-1,518.99	-1,522.00	-795.20	-776.00	-720.01	239.97	656.00	-3,382.14
Test Engineer	Capacity	1,760.00	1,600.00	1,760.00	1,760.00	1,680.00	1,760.00	1,840.00	1,680.00	1,760.00	1,760.00	1,680.00	1,840.00	20,880.00
	Demand	1,088.01	1,057.62	1,326.44	1,777.91	1,898.00	1,488.00	1,418.01	980.00	943.05	1,007.00	747.00	1,678.00	15,407.03
	Remaining Capacity	673.99	542.38	433.56	-17.91	-218.00	272.00	421.99	700.00	816.95	753.00	933.00	162.00	5,472.97
Grand Total	Capacity	10,736.00	9,760.00	10,736.00	10,736.00	10,248.00	10,736.00	11,224.00	10,248.00	10,736.00	10,736.00	10,248.00	11,224.00	127,368.00
	Demand	6,830.83	6,588.08	9,579.03	10,188.53	10,363.22	11,294.38	10,960.40	7,646.10	7,776.24	7,630.42	6,718.25	7,733.20	103,308.68
	Remaining Capacity	3,905.17	3,171.92	1,156.97	547.47	-115.22	-558.38	263.60	2,601.90	2,959.76	3,105.58	3,529.75	3,490.80	24,059.32

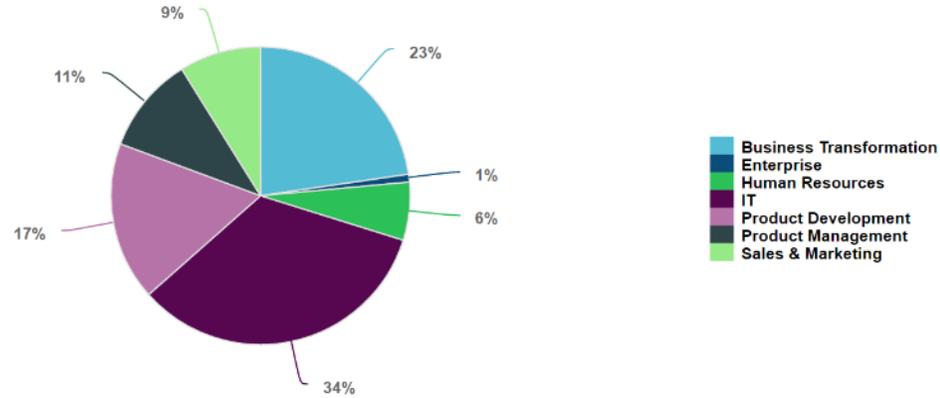
# OOTB Metrics – Resource

Over/Under Allocation by Resource		Remaining Capacity by Month (Hours)													
Resource	Primary Role	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Total	
Amos, Cheryl	Developer	0.00	0.00	0.00	0.00	8.00	46.00	64.00	80.00	0.00	0.00	0.00	0.00	198.00	
Bauer, Joyce	Network Engineer	0.00	0.00	0.00	20.00	8.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	148.00	
Berks, Paul	Project Manager	16.00	0.00	0.00	-45.31	-13.99	-28.00	0.00	0.00	0.00	0.00	0.00	0.00	-71.30	
Berry, Jason	Developer	0.00	0.00	0.00	-44.00	-68.00	-100.00	-40.00	-168.00	-76.00	-16.00	0.00	0.00	-512.00	
Bhatt, Rakesh	Storage Architect	0.00	0.00	160.00	52.00	48.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	260.10	
Childers, Valerie	Architect	0.00	0.00	0.00	-113.60	-56.80	-17.60	0.00	0.00	0.00	158.40	151.20	115.60	237.20	
Evans, Nick	Business Analyst	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	0.00	0.00	0.00	0.00	-40.00	
Gaurand, Alicia	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.00	125.00	27.00	28.00	16.00	336.00	
Granger, Paula	Project Manager	0.00	0.00	0.00	136.00	168.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	304.70	
Lewis, Dana	Business Analyst	0.00	0.00	0.00	0.00	0.00	-16.00	-18.00	-78.10	-176.00	-176.00	-168.00	-80.00	-712.10	
Lewis, Paul	Project Manager	-8.00	-12.00	0.00	0.00	13.99	-21.00	-55.99	-2.10	22.00	8.00	113.99	104.00	162.89	
Martin, Paul	Project Manager	0.00	0.00	12.00	0.00	-168.00	-144.00	-196.00	-130.00	-176.00	0.00	0.00	0.00	-802.00	
Moreau, Erin	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-17.00	-16.00	-80.60	-113.60	
Morris, Tom	Architect	0.00	0.00	-4.00	120.00	32.00	80.00	-102.00	-32.00	0.00	0.00	0.00	0.00	94.00	
Parker, Ashley	Business Analyst	0.00	0.00	-54.00	-100.00	-84.00	-56.00	-32.00	0.00	0.00	0.00	0.00	0.00	-326.00	
Patel, Sanjay	Developer	0.00	0.00	0.00	-76.00	-72.00	48.00	0.00	-22.00	0.00	0.00	0.00	0.00	-122.00	
Perez, Carlos	Project Manager	0.00	0.00	0.00	0.00	0.00	0.00	-84.00	-168.00	-176.00	-100.88	-168.00	-80.00	-776.88	
Quinn, Randy	Network Engineer	0.00	0.00	0.00	108.91	72.40	27.00	65.01	2.10	22.00	0.00	43.99	0.00	341.41	
Reed, Henry	Project Manager	-4.00	-8.00	0.00	-140.00	-160.00	-120.00	-104.00	0.00	0.00	0.00	68.00	84.00	-384.00	
Reilly, Jason	Test Engineer	0.00	0.00	0.00	0.00	-152.00	-66.10	-18.00	0.00	0.00	0.00	0.00	0.00	-236.10	
Riviera, Alex	Project Manager	0.00	0.00	0.00	0.00	-16.00	-34.00	-26.00	-168.00	-176.00	-17.60	-168.00	-84.00	-689.60	
Sampson, Mike	Test Engineer	0.00	0.00	0.00	36.00	-36.00	-88.00	-8.00	28.00	24.00	176.00	8.00	18.00	158.00	
Stewart, Diane	Storage Architect	17.60	-15.00	0.00	-10.60	-32.80	62.40	21.60	11.20	158.40	-158.40	-51.20	-65.60	-62.40	
Stoneburg, Sam	Network Engineer	0.00	0.00	0.00	130.00	144.00	28.00	120.00	36.00	24.00	176.00	168.00	184.00	1,010.00	
Thompson, Peter	Project Manager	-8.00	0.00	0.00	-25.31	-13.99	-11.00	-57.00	0.00	0.00	0.00	-34.99	16.00	-134.29	
Turner, Bruce	Test Engineer	0.00	0.00	0.00	76.00	-52.00	-178.00	28.70	26.00	117.00	16.00	0.00	0.00	33.70	
Walker, Terry	Test Engineer	12.00	24.00	0.00	0.00	-8.00	-12.00	-38.00	-40.00	-44.00	-77.00	-68.00	-84.00	-335.00	
<b>Grand Total</b>		<b>25.60</b>	<b>-11.00</b>	<b>114.00</b>	<b>124.09</b>	<b>-438.39</b>	<b>-480.30</b>	<b>-479.68</b>	<b>-524.90</b>	<b>-331.60</b>	<b>-1.48</b>	<b>-93.01</b>	<b>63.40</b>	<b>-2,033.27</b>	

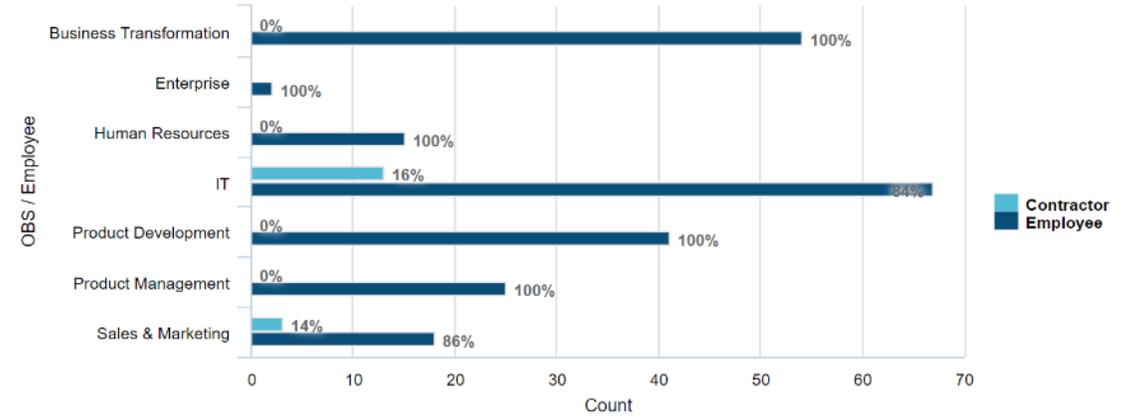
# OOTB Metrics – Resource

Select OBS By **OBS Type** **OBS Unit** Resource Pool:All Groups (or) OBS Type **Corporate Department OBS** Resource Type **All** Filter More

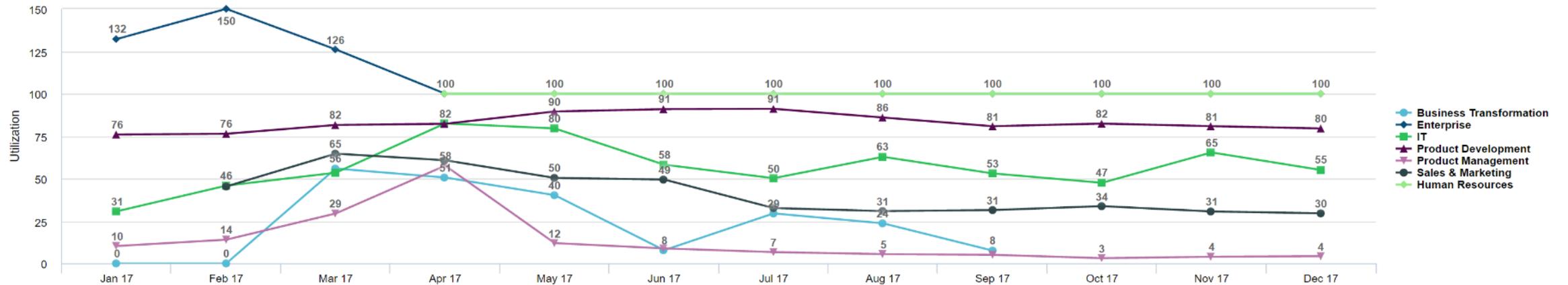
OBS Headcount Analysis



OBS Headcount by Type



OBS Resource Utilization



“Show me the health of my portfolios.”

Portfolio	Overall Health	Schedule Health	Cost Health	Risk	Target Cost	Distributed Cost	Target to Distribute Cost Variance
AA - July Training	Yellow	Green	Yellow	Yellow	280,000	280,000	
AA-jfmJulyTraining	Yellow	Green	Yellow	Yellow	180,000	180,000	
American Civil War	Grey	Grey	Grey	Grey	200,000	200,000	
A1 Prioritization Test Pfm	Grey	Grey	Grey	Grey			
Company XYZ -- Portfolio Prioritization	Green	Green	Green	Yellow	3,000.0		
crisroc	Grey	Grey	Grey	Grey	2.6		
CV_NM Portfolio	Grey	Grey	Grey	Grey	10.0		
DZ - Test Master Portfolio	Grey	Grey	Grey	Grey	5		
DZ - Test Sub Portfolio	Grey	Grey	Grey	Grey	16.0		
DZ - Test Sub Portfolio 2	Grey	Grey	Grey	Grey	6		
ec-Portfolio	Grey	Grey	Grey	Grey	1.2		
ec-test	Grey	Grey	Grey	Grey	3		
EE's Test Portfolio	Grey	Grey	Grey	Grey	2.2		
Ellen - Demo	Grey	Grey	Grey	Grey			
Grow The Business	Grey	Grey	Grey	Grey			
Inovalon Portfolio Demo	Grey	Grey	Grey	Grey			
Interval	Grey	Grey	Grey	Grey			
JA Demo Portfolio	Grey	Grey	Grey	Yellow			
Jen Dependency Test Portfolio	Grey	Grey	Grey	Grey			
Jens Role Portfolio	Red	Red	Red	Red			

**Note**

- The Portfolio Health indicators are subjective measures that the Portfolio Manager selects on the Portfolio Metrics sub-page.
- While useful, these metrics are not automatically calculated.

Portfolio: 2015 Portfolio - Properties - Metrics

Overall Health: 42

Health Factors:

- Cost Health: Yellow
- Schedule Health: Yellow
- Resource Health: Red

Measures:

- Goal Alignment: High
- Probability of Success: Medium
- Innovation Level: Medium
- Risk: High

Save Save And Return Return

Currency = USD WorkEffort = FTE

# OOTB Metrics – Portfolio



Investment	Budgeted Cost	Budgeted Capital Cost	Budgeted Operating Cost	Actual Cost	Actual Capital Cost	Actual Operating Cost	Forecast Cost	Forecast Capital Cost	Forecast Operating Cost	Budget to Forecast Cost Variance	Budget to Forecast Capital Cost Variance	Budget to Forecast Operating Cost Variance
BI Analytics	0	0	0	0	0	0	185,160	93,600	91,560	(185,160)	(93,600)	(91,560)
Client Services Datamart	243,800	92,400	151,400	0	0	0	101,848	77,920	23,928	141,952	14,480	127,472
CRM Enhancements	367,600	231,600	136,000	173,060	70,660	102,400	201,428	91,028	110,400	166,172	140,572	25,600
eCommerce Portal	384,200	122,600	261,600	86,600	0	86,600	283,541	152,600	130,941	100,659	(30,000)	130,659
Online Order Performance Improvements	244,400	98,000	146,400	0	0	0	127,160	100,832	26,328	117,240	(2,832)	120,072
<b>Total</b>	<b>1,240,000</b>	<b>544,600</b>	<b>695,400</b>	<b>259,660</b>	<b>70,660</b>	<b>189,000</b>	<b>899,137</b>	<b>515,980</b>	<b>383,157</b>	<b>340,863</b>	<b>28,620</b>	<b>312,243</b>

Displaying 1 - 5 of 5

Save

# OOTB Metrics – Portfolio

“Based on the labor supply and demand tracked in the portfolio, show me whether or not resource shortages exist.”

Portfolio Dashboard: Roles

Manager | Stakeholder | Filter

This is the labor capacity we built for the particular portfolio minus Derived from the project allocations = Labor Variance

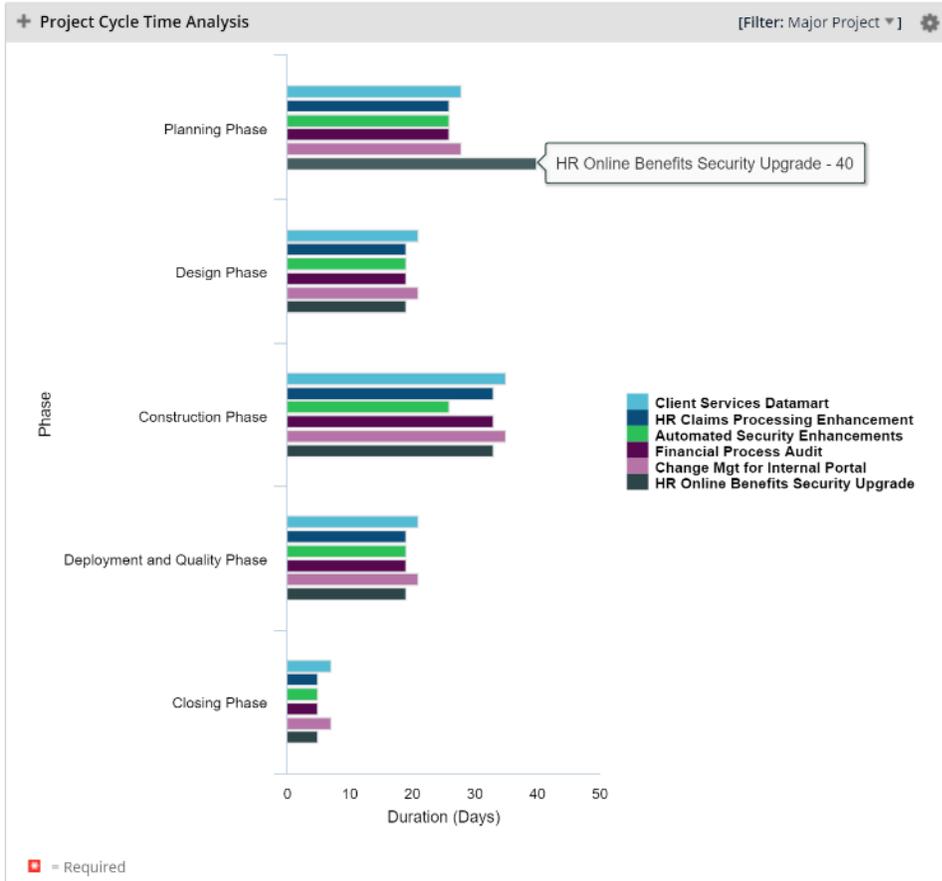
Portfolio	Overall Health	Risk	Target Overall Roles	Distributed Overall Roles	Target to Distributed Roles Variance	Role Demand	Distributed to Role Demand Variance
AA - July Training	🟡	🟡	1,500.00	1,500.00	0.00	0.00	1,500.00
AA-jfmJulyTraining	🟡	🟡	1,500.00	1,500.00	0.00	34,697.41	(33,197.41)
American Civil War	🟢	🟢	700.00	0.00	700.00	0.00	0.00
A1 Prioritization Test Pfm	🟢	🟢	0.00	0.00	0.00	0.00	0.00
Company XYZ -- Portfolio Prioritization	🟢	🟡	0.00	0.00	0.00	0.00	0.00
crisroc	🟢	🟢	0.00	0.00	0.00	0.00	0.00
CV_NM Portfolio	🟢	🟢	18,000.00	18,000.00	0.00	0.00	18,000.00
DZ - Test Master Portfolio	🟢	🟢	0.00	0.00	0.00	0.00	0.00
DZ - Test Sub Portfolio	🟢	🟢	0.00	0.00	0.00	0.00	0.00
DZ - Test Sub Portfolio 2	🟢	🟢	0.00	0.00	0.00	0.00	0.00
ec-Portfolio	🟢	🟢	0.00	0.00	0.00	0.00	0.00
ec-test	🟢	🟢	0.00	45,000.00	(45,000.00)	183,792.17	(138,792.17)
EE's Test Portfolio	🟢	🟢	5.00	5.00	0.00	17.10	(12.10)
Ellen - Demo	🟢	🟢	80.00	0.00	80.00	52.10	(52.10)
Grow The Business	🟢	🟢	0.00	0.00	0.00	6.25	(6.25)
Inovalon Portfolio Demo	🟢	🟢	2,000.00	2,000.00	0.00	0.00	2,000.00
Interval	🟢	🟢	25,000.00	0.00	25,000.00	0.00	0.00
JA Demo Portfolio	🟢	🟡	7.00	7.00	0.00	6.81	0.19
Jen Dependency Test Portfolio	🟢	🟢	0.00	0.00	0.00	0.00	0.00
Jens Role Portfolio	🟢	🔴	81,685.00	81,685.00	0.00	42,825.00	38,860.00

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# OOTB Metrics – Portfolio



# OOTB Metrics – Portfolio



**+ Pending Estimates Review**

Project	Task	Resource	Start	Finish	Pending ETC	Plan ETC	Pending Actuals	Adjusted Plan ETC	Recommended Change in ETC	Increase/Decrease in ETC
CRM Contact Center Development	Functional and Technical Design	Walker, Terry	1/24/17	2/6/17	5.00	0.00	40.00	(40.00)	45.00	◆
eCommerce Portal	Complete Project Plan	Goldman, Mark	3/31/17	4/18/17	30.00	80.00	40.00	40.00	(10.00)	◆
<b>Total</b>					<b>35.00</b>	<b>80.00</b>	<b>80.00</b>	<b>0.00</b>	<b>35.00</b>	

Displaying 1 - 2 of 2

**+ Missing Status Reports** [Filter: Shared Services]

Project	Manager	Status Reporting	Project Type	Work Status
HR Claims Processing Enhancement	Sutherland, Joy	Required	Application Change	Active
Meeting Reservation Portal	Tanner, Paul	Optional	Major Project	Active
Office Upgrade	Tanner, Paul	Required	Major Project	Active

□ = Required

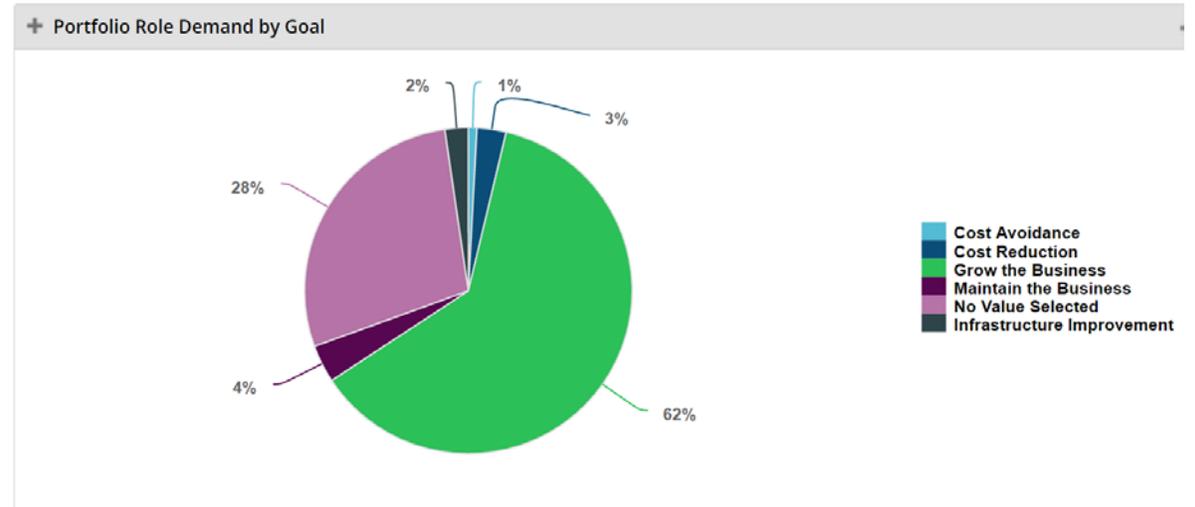
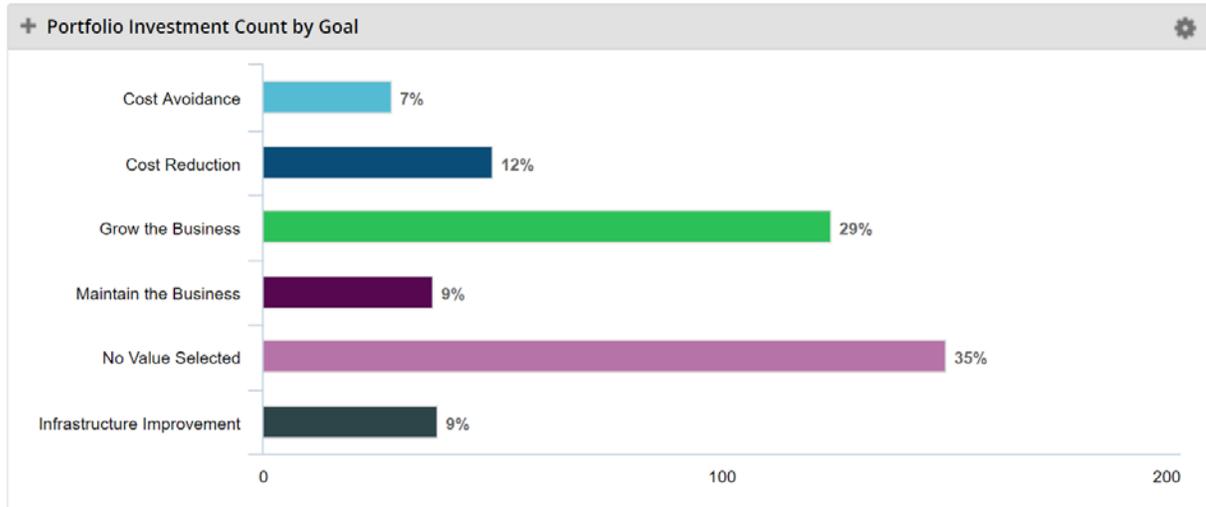
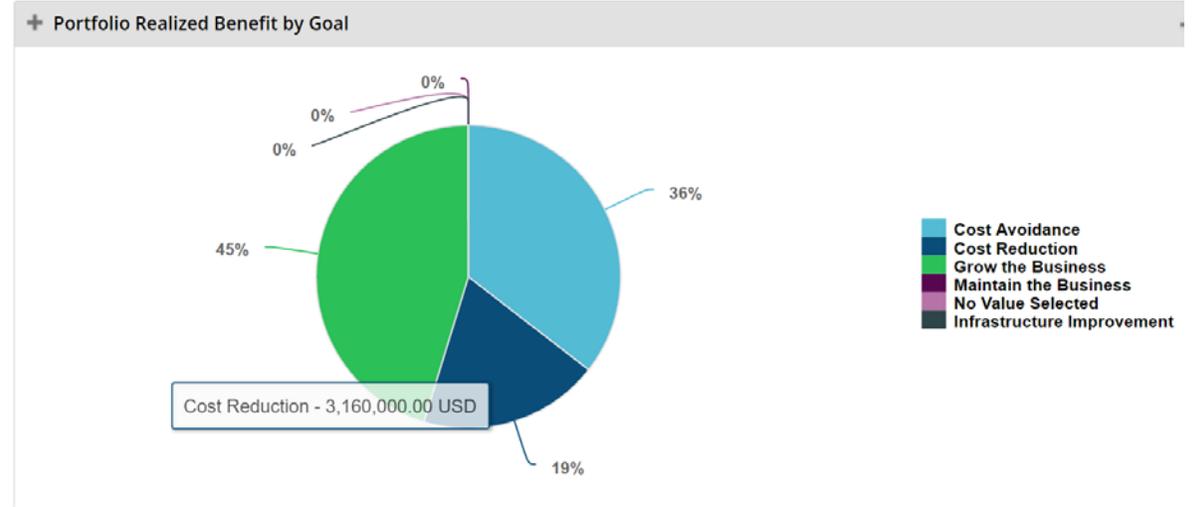
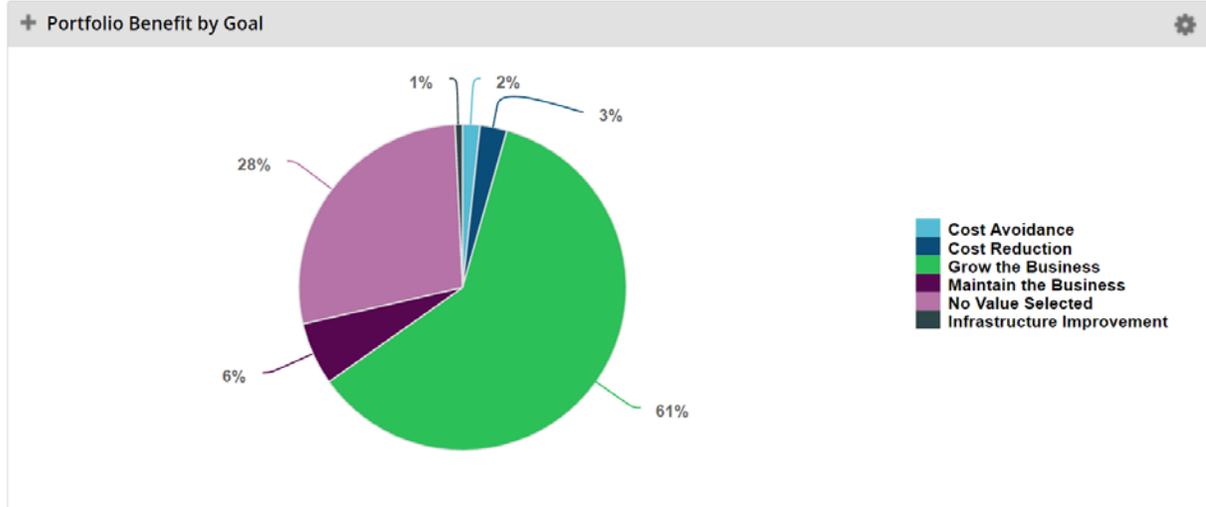
Displaying 1 - 3 of 3

**+ Process Bottlenecks** [Filter: Issue Review and Escalation]

Process	Instance	Flow Diagram	Initiated By	Verify & Determine Root Cause	PMO Issue Escalation	Resubmit Issue	Business Owner Signoff
				Duration and Reviewers	Duration and Reviewers	Duration and Reviewers	Duration and Reviewers
Issue Review and Escalation	Requirements are unclear	⊙	Morris, Tom	◆ 1 day, 2 hours, 45 minutes ( Paul Martin )	◆ 21 hours, 11 minutes ( Pam Olney )	◆ 2 hours, 8 minutes ( Tom Morris )	◆ 18 days, 5 hours, 45 minutes ( Randy Quinn )
Issue Review and Escalation	Funding is being reduced	⊙	Berry, Jason	◆ 2 hours, 11 minutes ( Joy Sutherland )	◆ 3 hours, 27 minutes ( Pam Olney )	◆	◆ 5 hours, 33 minutes ( Beth Roberts )
Issue Review and Escalation	Database Performance is slow	⊙	Berry, Jason	◆ 3 hours, 41 minutes ( John McCarthy )	◆ 7 hours, 21 minutes ( Pam Olney )	◆	◆ 4 hours, 3 minutes ( Beth Roberts )
Issue Review and Escalation	Resource conflicts	⊙	Thompson, Peter	◆ 3 hours, 35 minutes ( Paula Granger )	◆ 6 hours, 26 minutes ( Pam Olney )	◆	◆ 2 hours, 16 minutes ( Beth Roberts )

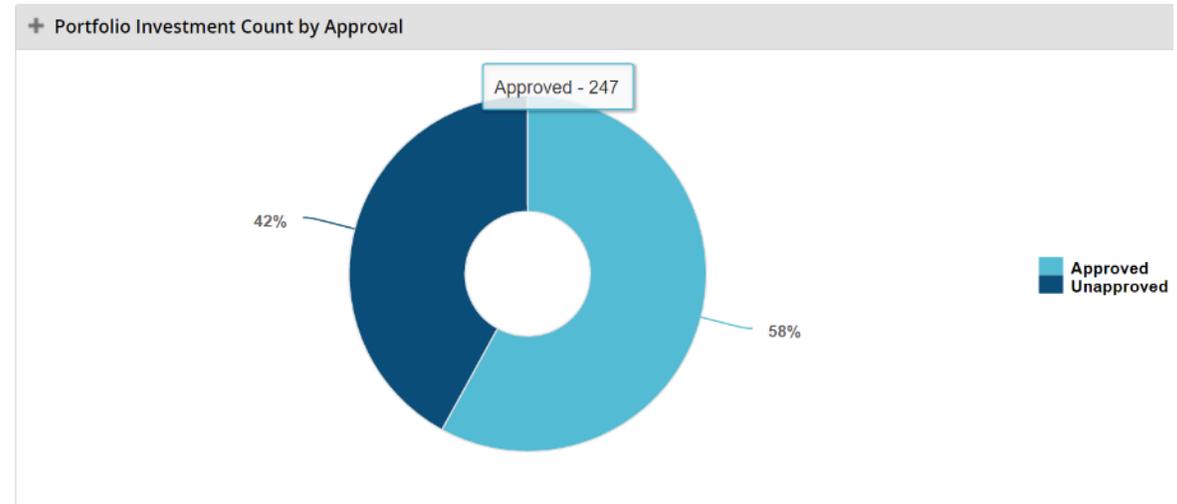
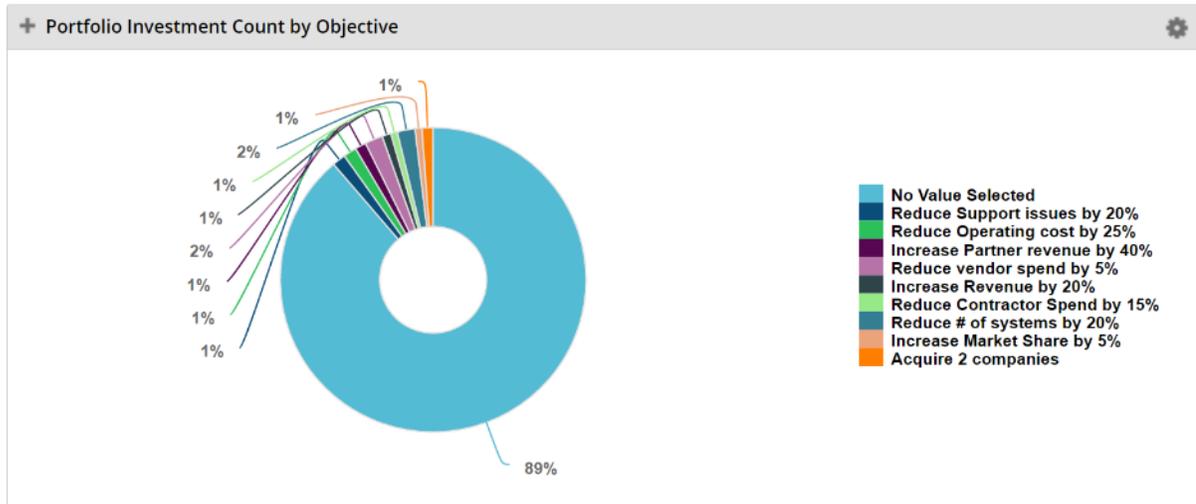
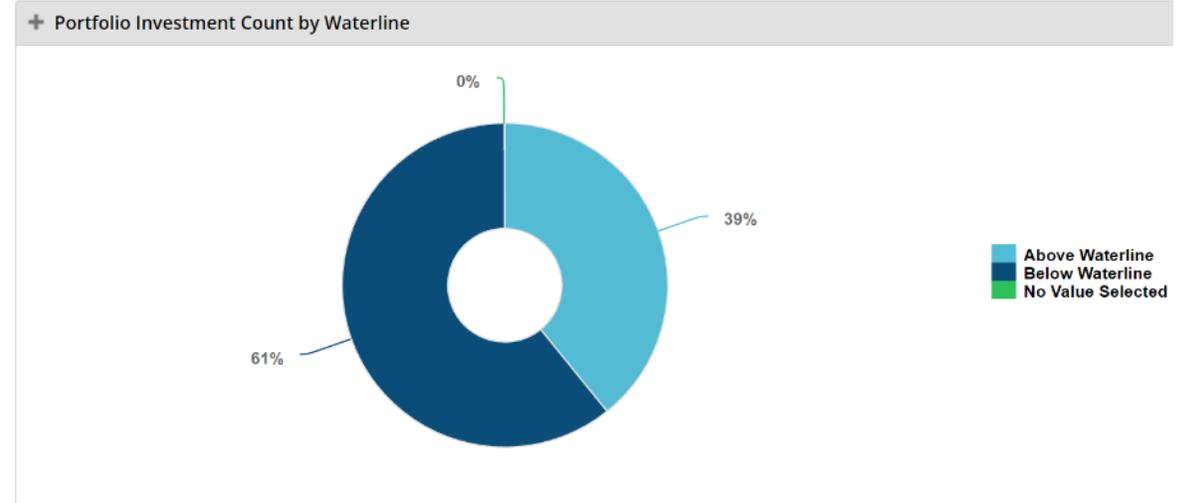
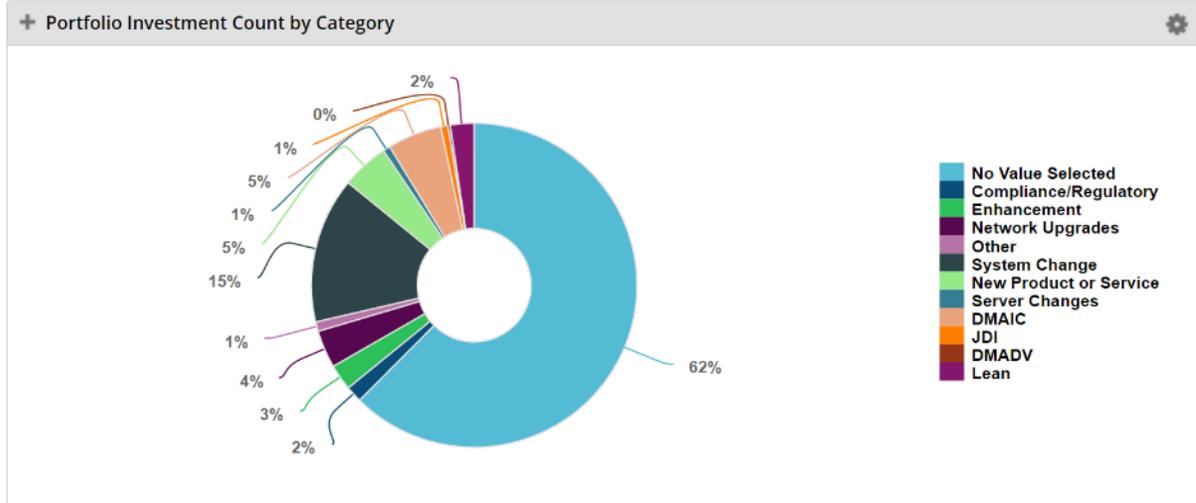
# OOTB Metrics – Portfolio

Filter: None Portfolio Manager Stakeholder Above Waterline All Filter More



# OOTB Metrics – Portfolio

Filter: None | Portfolio | Manager | Stakeholder | Above Waterline All | Filter | More



# OOTB Metrics – Portfolio



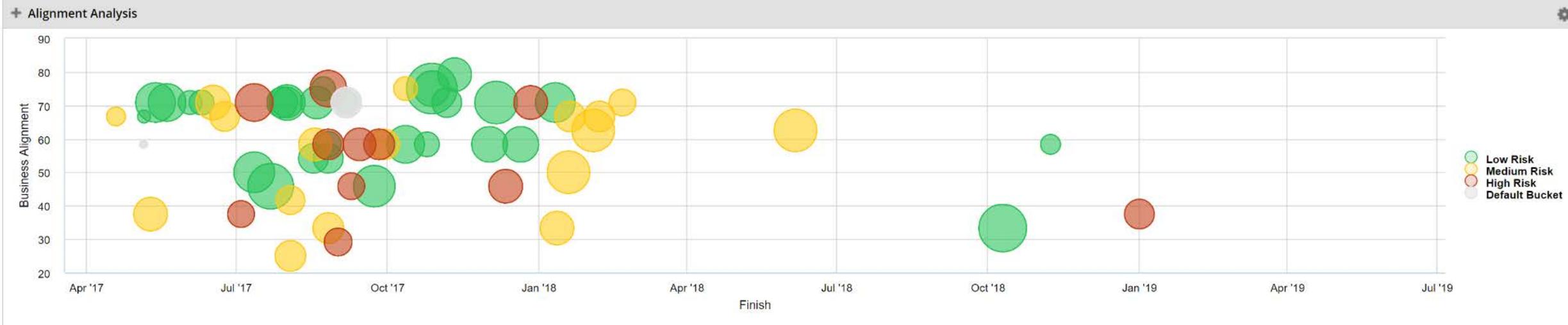
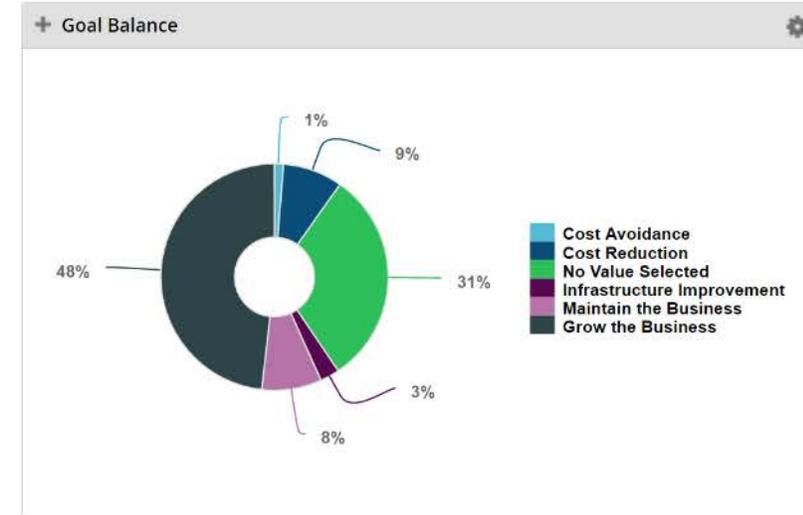
### + Annual Planning

[Filter: Business Unit ▼]

Portfolio Name ▲	Target	Actual	Delta
Business Unit 1	100	100	0
Business Unit 2	100	100	0
Business Unit 3	100	100	0
Business Unit 4	100	100	0
Business Unit 5	100	100	0
Business Unit 6	100	100	0
Business Unit 7	100	100	0

Displaying 1 - 7 of 7

Save



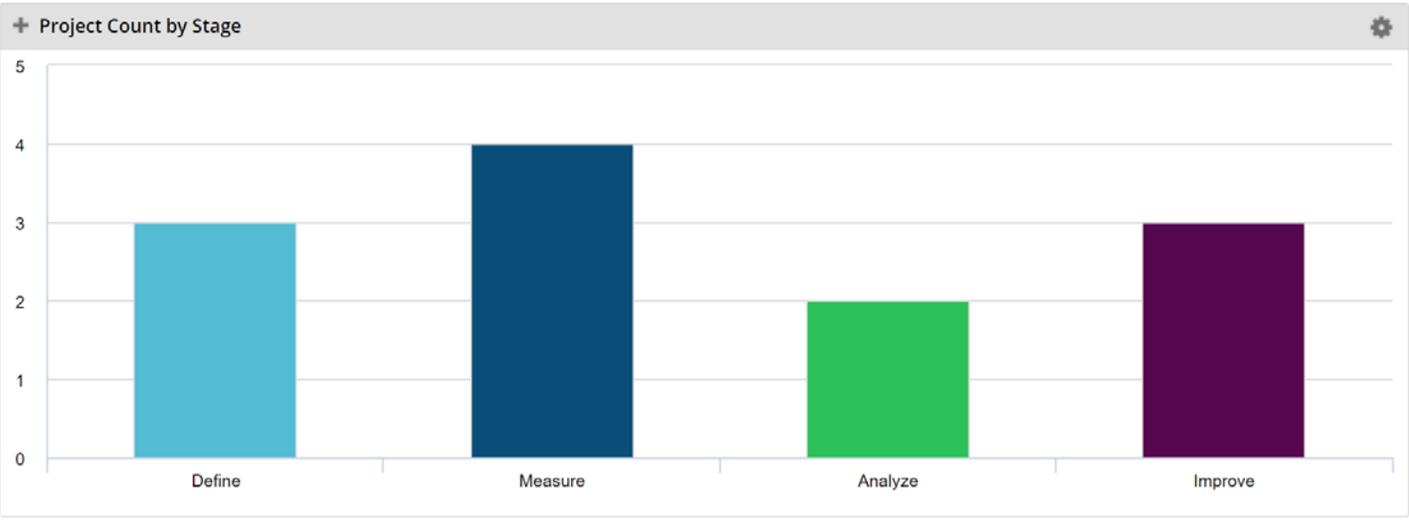
# OOTB Metrics – Portfolio

**+ At Risk Projects**

Project / WBS	Start	Finish	Overall Status	Schedule %	Days Late	Gantt Schedule					
						May 16	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16
+ Maintain legacy purchasing system	5/21/16	9/22/17	◆	◆	77	[Gantt bar from May 16 to Sep 16]					
+ Modernize customer service portal	6/4/16	7/21/17	◆	◆	112	[Gantt bar from Jun 16 to Sep 16]					
+ Personalized online shopping experience	6/4/16	12/20/17	◆	◆	264	[Gantt bar from Jun 16 to Oct 16]					
+ Web Application Enhancement	3/26/17	12/31/18	◆	◆	522	[Gantt bar from Sep 16 to Oct 16]					

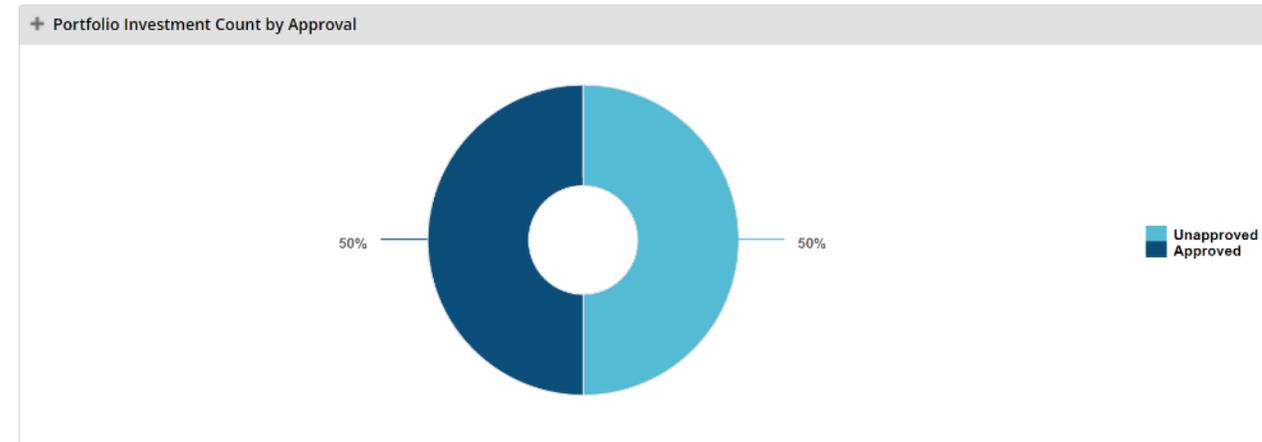
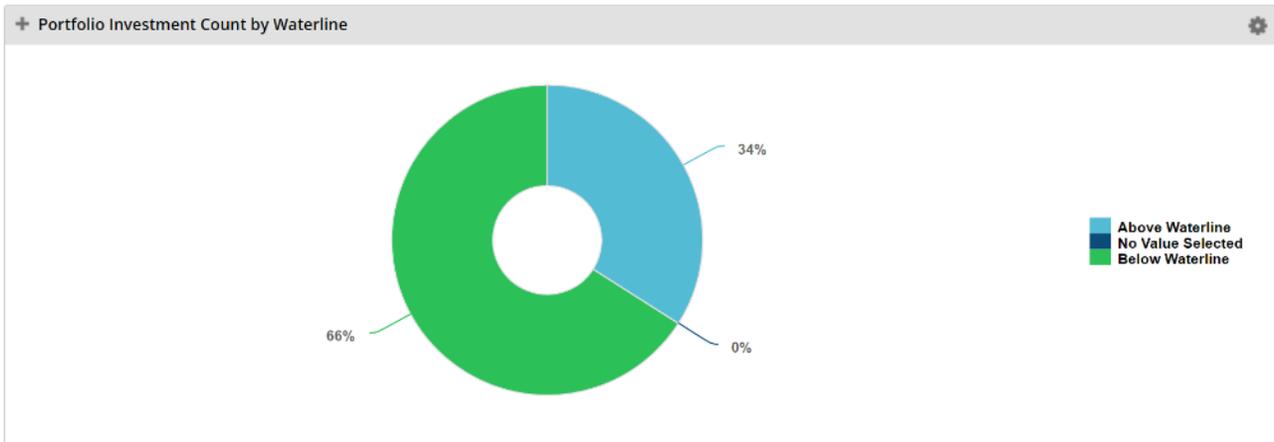
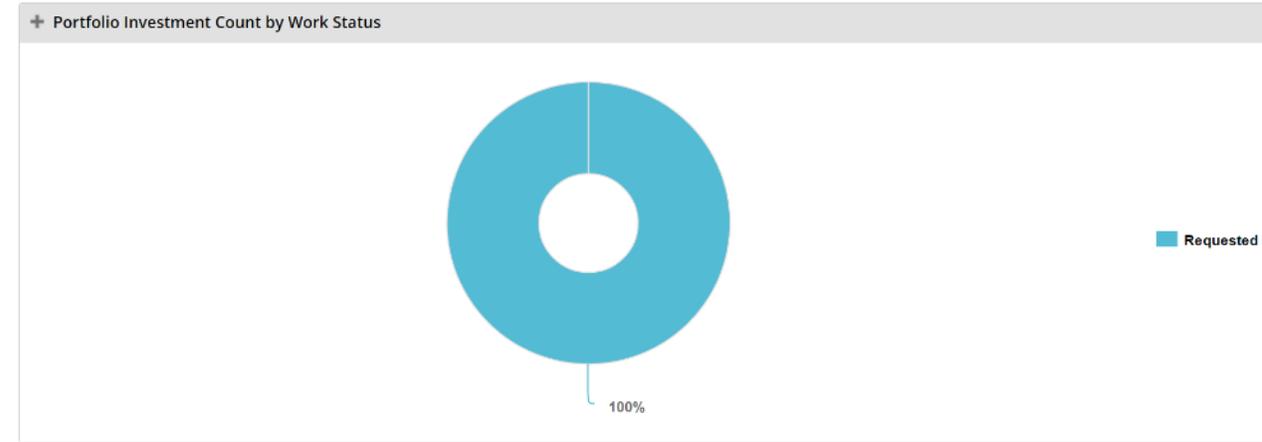
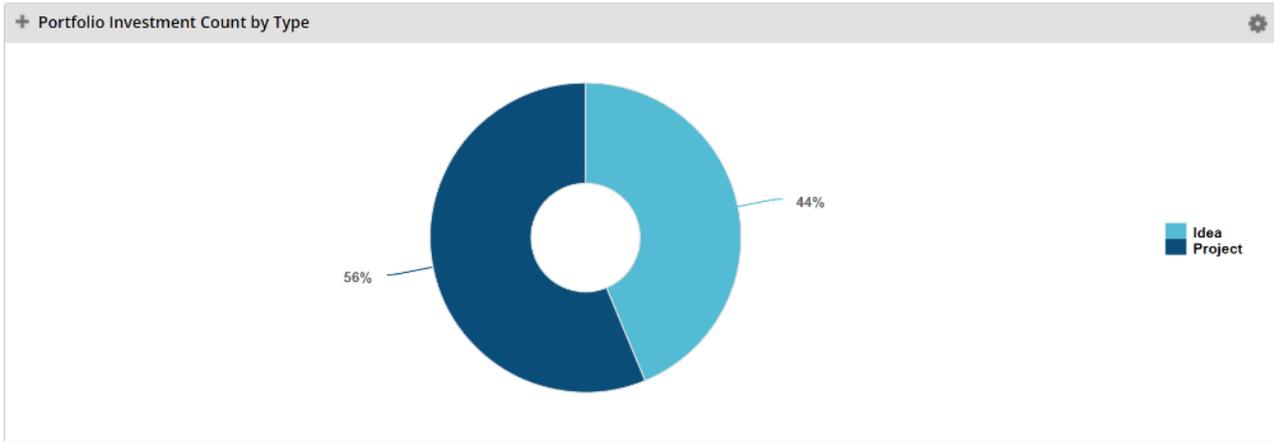
**Planned Savings**

Project Manager ▲	Count	Critical	At Risk	On Track	Total
Alvarez, Corine	3	2,100,000		2,350,000	4,450,000
Angelo, Michael	6	0	0	0	0
Beck, Jackson	1			4,500,000	4,500,000
Berg, Kathryn	2		350,000	70,000	420,000
Berks, Paul	6			3,125,000	3,125,000
Brooks, Emma	1			1,200,000	1,200,000
Core, Elizabeth	2			1,950,000	1,950,000
Craig, Allen	2			0	0
Delgado, Mauricio	3		5,900,000	3,200,000	9,100,000
Fleming, Nicole	2			600,000	1,550,000
Flynn, Sam	8				6,360,000
Granger, Paula	1			1,120,000	1,120,000
Lewis, Dana	2			710,000	1,660,000
Madden, Paul	12	680,000		6,589,000	7,269,000
Martin, Paul	7		1,400,000	2,675,000	4,075,000
McCarthy, John	6	450,000	40,000	1,705,000	2,195,000
Miles, Paul	10		0	0	15,250,000
Nunez, Angie	1			0	0
Paxton, Robyn	5		300,000	2,450,000	2,750,000
Reed, Henry	5		1,050,000	3,412,000	4,762,000
<b>Total</b>	<b>112</b>	<b>3,230,000</b>	<b>38,178,000</b>	<b>93,931,000</b>	<b>243,149,000</b>



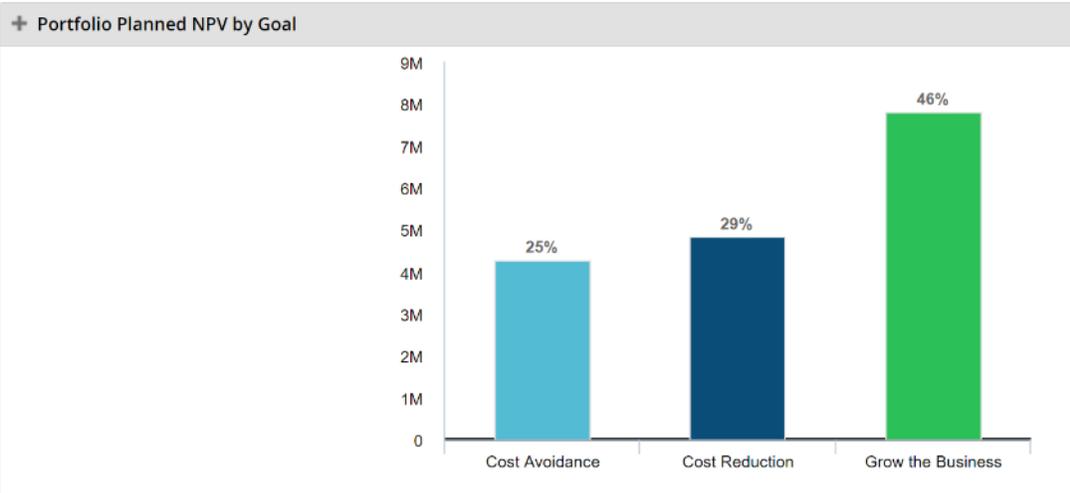
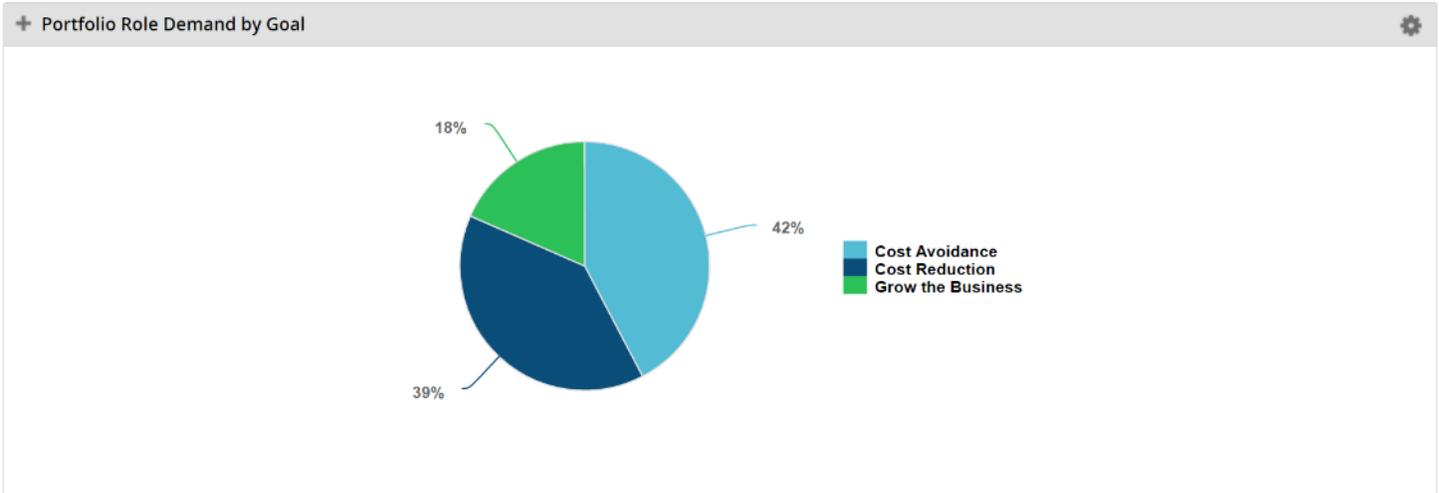
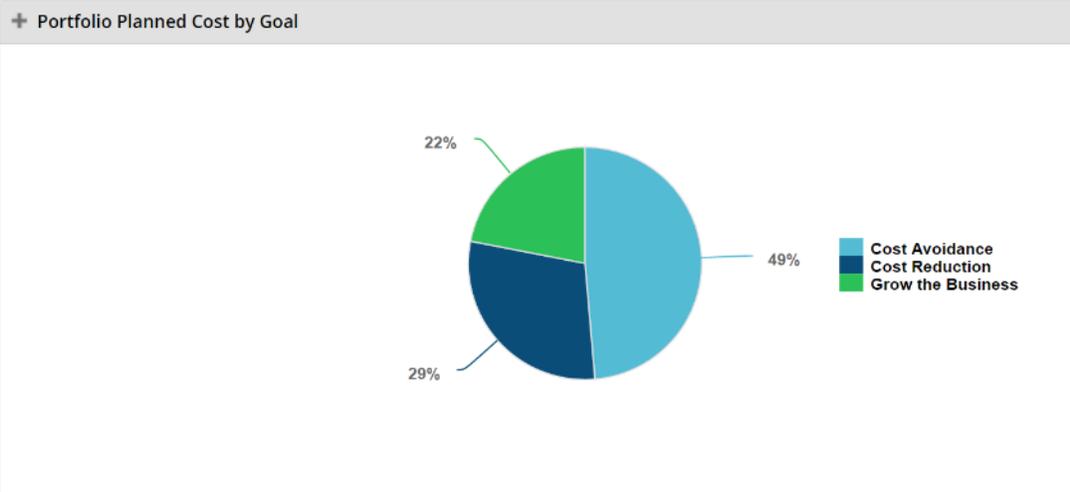
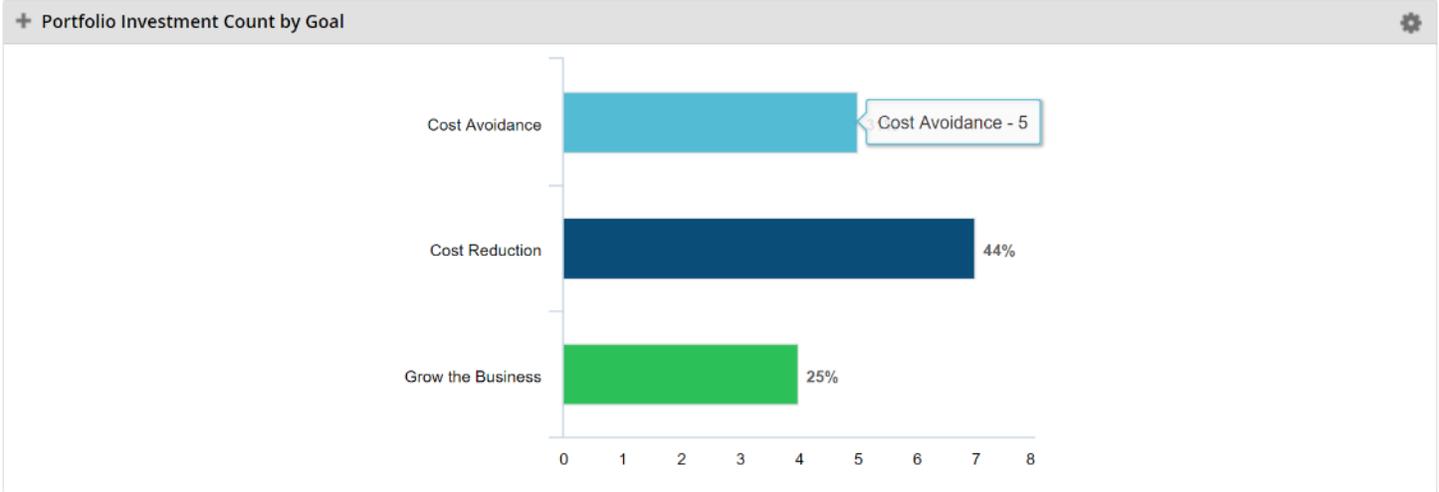
# OOTB Metrics – Portfolio

BT Manager Thomas, Brian Stakeholder Above Waterline Yes Filter More



# OOTB Metrics – Portfolio

BT Manager Thomas, Brian Stakeholder Above Waterline Yes Filter More



# OOTB Metrics – Compliance

Status Report Listing    Late and Missing Status Reports

### Status Report Review: Late and Missing Status Reports

OBS  Project Manager

**Late Status Reports**

Report Date	Project	Manager	Status Reporting	Project Type	Work Status
3/18/15	2015 Security Compliance	Peacock, Bob	Required	Major Project	Requested
3/12/15	2015 Accounting Integration	Hackney, Ron	Required	Major Project	Active
3/12/15	2015 Software Implementation	Peacock, Bob	Required	Major Project	Requested
3/10/15	2015 Infrastructure Services	Peacock, Bob	Optional	Major Project	Requested

Displaying 1 - 4 of 4

**Missing Status Reports**

Project	Manager	Status Reporting	Project Type	Work Status
2015 Online Web Portal Program	Ayala, Juan	Optional		Requested

Displaying 1 - 1 of 1

Timesheets

### Timesheet Review: Timesheets

**Timesheet Review**

Timesheet	Notes Attached	Resource	Employment Type	Task	Status	Adjustment	Period Start	Period End	Pending Actuals	Posted Actuals	Total Actuals
		Morris, Tom	Employee	Application Security Audit	Open		5/4/15	5/10/15	24.00	0.00	24.00
		Morris, Tom	Employee	Application Security Audit	Open		5/11/15	5/17/15	16.00	0.00	16.00
<b>Total</b>									<b>40.00</b>	<b>0.00</b>	<b>40.00</b>

Displaying 1 - 2 of 2

# Samples: CA PowerBI Metric Dashboards

PowerBI Dashboards developed by CA in anticipation of the new REST APIs coming soon. We expect these will be included free in a content pack, but we cannot say for sure.

# CA PowerBI – Resource

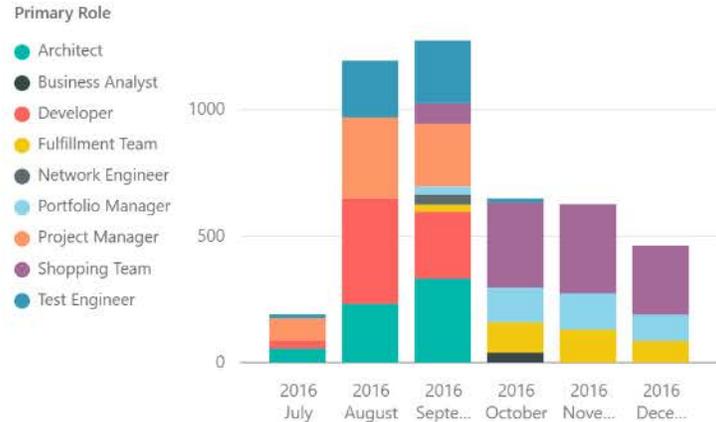
ENTERED HOURS BY RESOURCE MANAGER



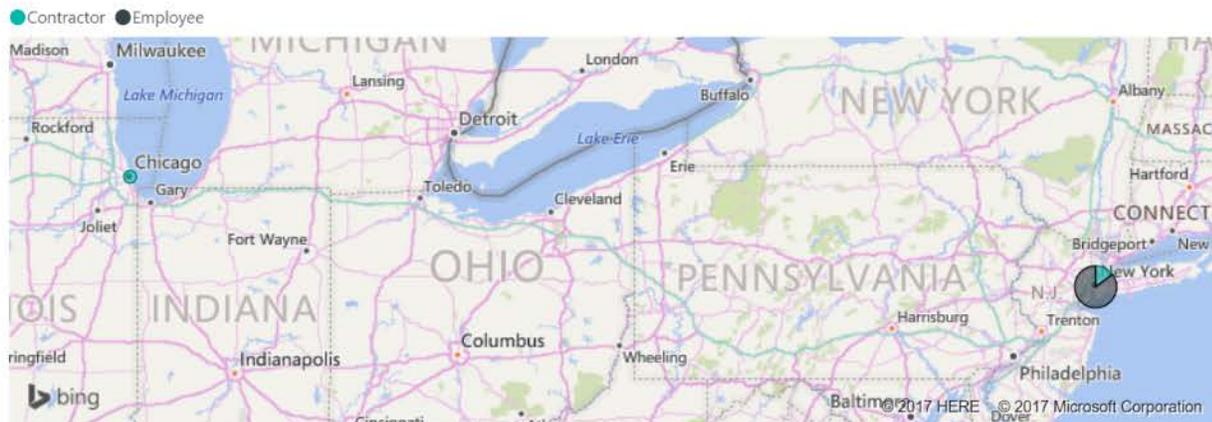
ENTERED HOURS BY INVESTMENT



ENTERED HOURS BY PRIMARY ROLE



ENTERED HOURS BY LOCATION AND EMPLOYEE TYPE



- Portfolio Name
- Application Management
  - Business Unit 1
  - Business Unit 2
  - Business Unit 3
  - Business Unit 4
  - Business Unit 5
  - Business Unit 6
  - Business Unit 7

- Month End Year
- 2018
  - 2017
  - 2016

- Investment Type
- Application
  - Asset
  - Idea
  - Project

- Investment Role
- Architect
  - Business Analyst
  - DBA
  - Developer
  - Project Manager
  - Test Engineer

- OBS Unit
- Business Operations
  - Development
  - IT
  - Shared Services

Total Allocation Hours

134.03K

Total Allocation Cost

21.24M

Allocation Hours by Month and Role



Allocation Cost by Month and Role



# CA PowerBI – Project/Program – Status

# of Change Requests

14

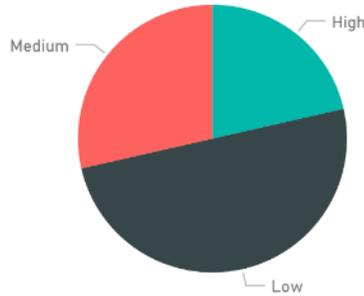
# of Approved Change Requests

1

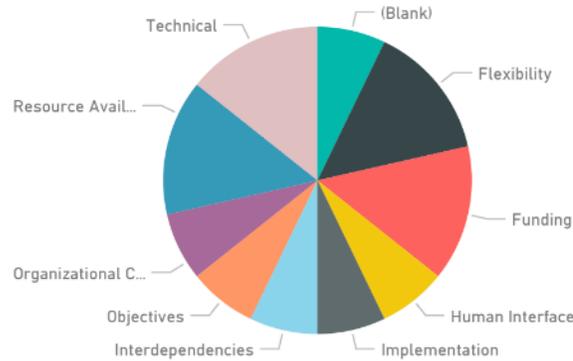
# of Open Change Requests

13

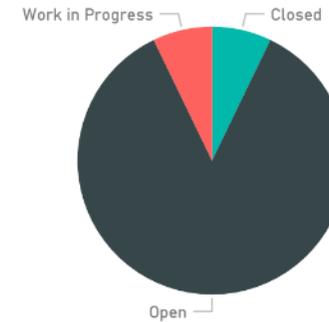
Change Requests by Priority



Change Requests by Category



Change Requests by Status



Change Request Name	Project Name	Change Request Owner	Change Request Priority	Change Request Category	Change Request Stat...
Change Request 1	Restructure NA Procurement Process	Thomas, Brian	High	Organizational Culture	Open
Development Phase Extension Request	Web Application Enhancement	Sutherland, Joy	High	Flexibility	Open
Funding for contractors	Online Web Portal Program	Martin, Paul	High	Funding	Open
Additional equipment	Online Web Portal Program	Granger, Paula	Low	Technical	Open
Additional Sales Analytics	eCommerce Portal	Martin, Paul	Low	Objectives	Closed
Change Request 1	A Fantastic Project	Thomas, Brian	Low	Human Interface	Open
Change Request 1	Restructure LatAm Procurement Process	Thomas, Brian	Low	Interdependencies	Open
Funding Issue - request additional funds	Minimal Online Shopping Site	Granger, Paula	Low	Funding	Open
Implementation risk	BI Analytics	Olney, Pam	Low	Implementation	Open
Resource risk	Credit Card Processing Enhancement	Miller, Rosie	Low	Resource Availability	Open
Additional resources	Online Web Portal Program	McCarthy, John	Medium	Resource Availability	Open



# CA PowerBI – Project/Program – Status

# of High Priority Issues

2

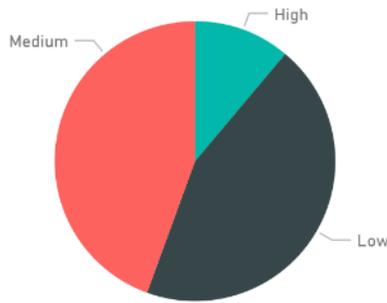
# of Resolved Issues

4

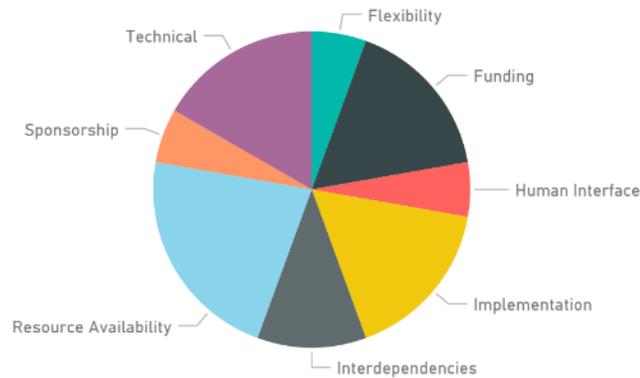
# of Open Issues

14

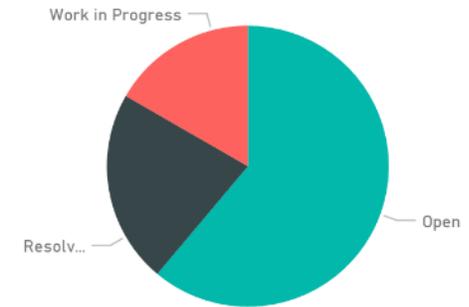
Issues by Priority



Issues by Category



Issues by Status



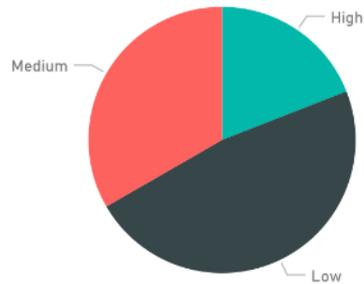
Issue Name	Project Name	Issue Owner	Issue Priori...	Issue Category	Issue Status	Issue Resolved Date	Issue Target Res...
Dependent on Datamart performance	Web Application Enhancement	Sutherland, Joy	Low	Interdependencies	Work in Progress		1/1/2017
Funding is being reduced	Web Application Enhancement	Berry, Jason	Medium	Funding	Resolved	6/28/2016	11/18/2016
Issue 1	Restructure NA Procurement Process	Thomas, Brian	Medium	Funding	Open		12/4/2016
Issue 1	Restructure LatAm Procurement Process	Thomas, Brian	Medium	Resource Availability	Open		12/4/2016
Portlet for Customer Accounts	Online Web Portal Program	Morris, Tom	Medium	Implementation	Resolved	10/21/2015	4/19/2016
Resource conflicts	Online Web Portal Program	Johnson, Eric	Medium	Resource Availability	Resolved	5/14/2008	3/13/2016
Database version upgrade	Online Order Performance Improvements	Morris, Tom	High	Technical	Work in Progress		12/11/2016
Tests were done, but not matched hardware	Online Order Performance Improvements	Morris, Tom	Low	Technical	Work in Progress		12/27/2016
Issue 1	New Branding Initiative - NA Region	Thomas, Brian	Low	Human Interface	Open		11/3/2016

# CA PowerBI – Project/Program – Status

# of High Priority Risks

4

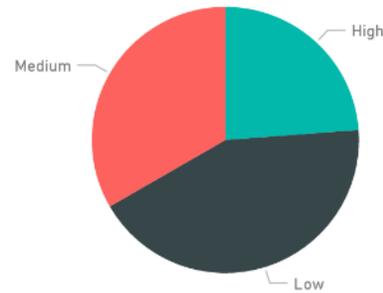
Risks by Priority



# of High Probability Risks

5

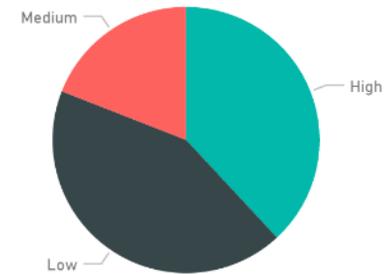
Risks by Probability



# of High Impact Risks

8

Risks by Impact



Risk Name	Project Name	Risk Owner	Risk Category	Risk Priority ▲	Risk Probability	Risk Impact	Risk Target Resolution Date
Dependent on Datamart performance	Web Application Enhancement	Sutherland, Joy	Interdependencies	High	Medium	Medium	2/16/2017
Insufficient capacity may impede proper sizing of teams to meet mileston...	Online Web Portal Program	Granger, Paula	Resource Availability	High	Medium	Medium	4/12/2016
Poorly Defined Requirements	Web Application Enhancement	Sutherland, Joy	Sponsorship	High	High	High	12/31/2016
Reduction of Funding	New Branding Initiative - NA Region	Thomas, Brian	Funding	High	Medium	High	12/13/2016
Can switching technology increase performance?	Online Order Performance Improvements	Morris, Tom	Technical	Low	Low	Low	12/1/2016
Funding Risk	Minimal Online Shopping Site	Administrator, Syste...		Low	Low	Low	2/17/2017
Global Agreement	Restructure NA Procurement Process	Thomas, Brian	Interdependencies	Low	Low	Low	12/13/2016
Implementation risk	BI Analytics	Olney, Pam	Implementation	Low	Medium	High	12/3/2016
Java vs .NET performance	Online Order Performance Improvements	Morris, Tom	Technical	Low	Low	Low	11/21/2016
Network and bandwidth issues may occur at a critical point in program	Online Web Portal Program	Martin, Paul	Technical	Low	Low	High	4/19/2016
No budget	eCommerce Portal	Martin, Paul	Funding	Low	Low	Low	10/23/2016

# CA PowerBI – Project/Program – Health

CIO Alert Projects

- No
- Yes

Product

- Fulfillment
- Online Orders
- Online Store
- Social Media

Budget	Actuals	Forecast	Variance	Variance %
--------	---------	----------	----------	------------

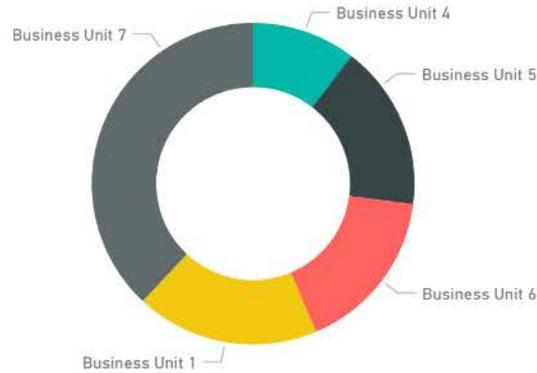
\$1.19M      \$800.00K      \$920.12K      (\$85.93K)      -7 %

% Projects Complete	Project Cycle Time	% Outcomes Realized	Target Benefit	Realized Benefit
---------------------	--------------------	---------------------	----------------	------------------

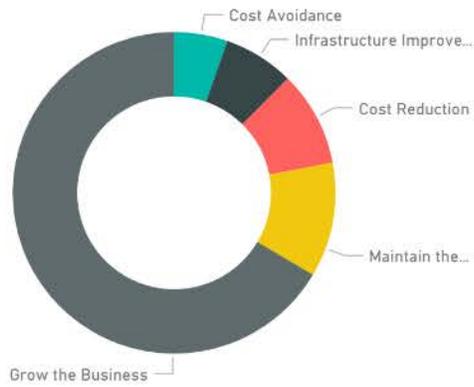
63 %      70      38 %      \$10.00M      \$5.00M

Project Name	Stage	Status	Schedule	Alignment	Risk	Issues	CRs	Complete	Outcome Realized	Resource Alloc	Planned Cost	Product
Return Authorization	Launch	◆	◆	◆	⚠	◆	◆	Yes	No	984	\$258,720	Online Orders
Order Confirmations	Development	◆	◆	⚠	⚠	◆	✖	No	No	1344	\$192,400	Online Orders
Import LinkedIn Profile	Launch	⚠	◆	⚠	⚠	◆	◆	Yes	No	944	\$169,920	Social Media
Integrate Social into Shopping Experie...	Development	✖	◆	◆	✖	✖	✖	No	Yes	1200	\$168,000	Social Media
Build read-write API for handling Orders	Launch	◆	◆	⚠	⚠	✖	◆	Yes	Yes	1032	\$134,160	Online Orders
Connect to Snapchat	Testing and Validation	◆	✖	⚠	✖	◆	◆	No	Yes	736	\$122,688	Social Media
Link to Instagram	Launch	◆	◆	◆	◆	⚠	◆	Yes	No	704	\$119,680	Social Media
Order Suggestions	Launch	◆	◆	◆	⚠	✖	◆	Yes	No	768	\$111,360	Online Orders
<b>Total</b>										<b>7712</b>	<b>\$1,276,928</b>	

Budget to Forecast Cost Variance by Portfolio



Budget to Forecast Variance by Goal



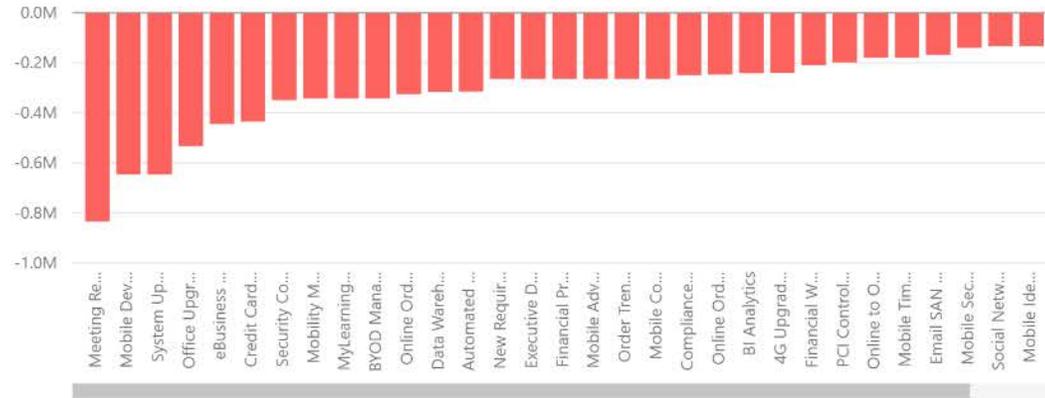
Projects over Budget

34

Over Budget by \$

-14.98M

Budget to Forecast Variance



Investment Name	Investment Manager	Max of Total Forecast Cost	Max of Total B...	Max of Total Budget to ... ▲
Meeting Reservation Portal	Tanner, Paul	834,950.00	0.00	-834,950.00
Mobile Device Management (MDM) Deployment	Paxton, Robyn	646,260.00	0.00	-646,260.00
System Upgrade Release 14	Paxton, Robyn	646,260.00	0.00	-646,260.00
Office Upgrade	Tanner, Paul	533,300.00	0.00	-533,300.00
eBusiness Mobile Network	Paxton, Robyn	445,000.00	0.00	-445,000.00
Credit Card Security Improvements	Reed, Henry	435,000.00	0.00	-435,000.00
Security Compliance	Sutherland, Joy	349,200.00	0.00	-349,200.00
Mobility Management Services	Tanner, Paul	343,020.00	0.00	-343,020.00
MyLearning Mobile Pilot	Tanner, Paul	343,020.00	0.00	-343,020.00
BYOD Management	Tanner, Paul	343,020.00	0.00	-343,020.00
Online Order Entry	McCarthy, John	325,500.00	0.00	-325,500.00

Portfolio

- Business Unit 1
- Business Unit 2
- Business Unit 4
- Business Unit 5
- Business Unit 6
- Business Unit 7

Goal

- Cost Avoidance
- Cost Reduction
- Grow the Business
- Infrastructure Improvement
- Maintain the Business

- External Labor
- Internal Labor

- 2018
- 2017

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November

Total Spend

27.22M

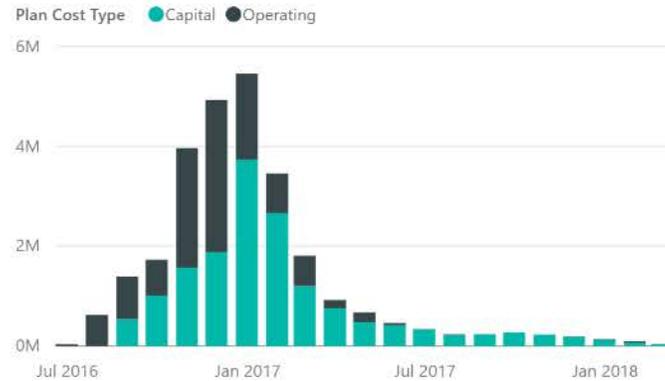
Total Capital Cost

15.94M

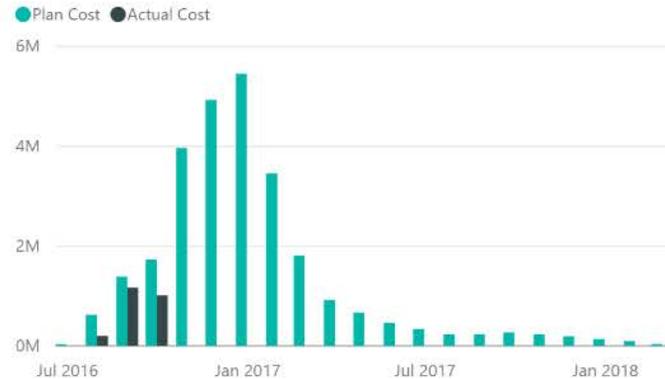
Total Operating Cost

11.28M

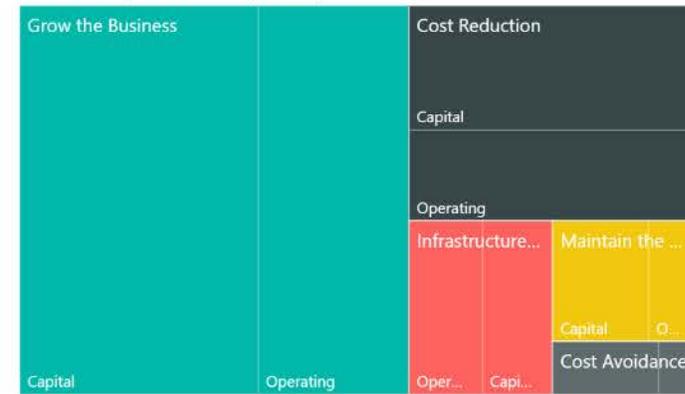
CapEx and OpEx by Fiscal Period



Plan vs. Actual by Fiscal Period



Plan Cost by Goal and CapEx / OpEx



Effort by Stage and CapEx / OpEx



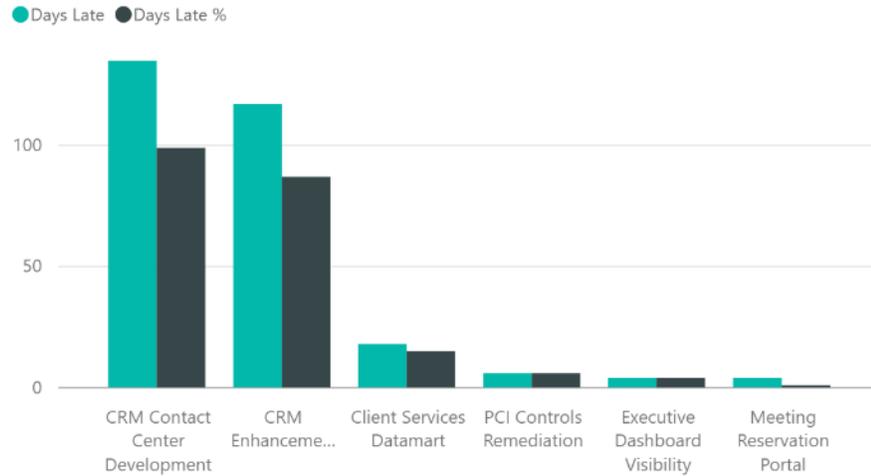
Portfolio Name

- Business Unit 1
- Business Unit 4
- Business Unit 5
- Business Unit 6
- Business Unit 7

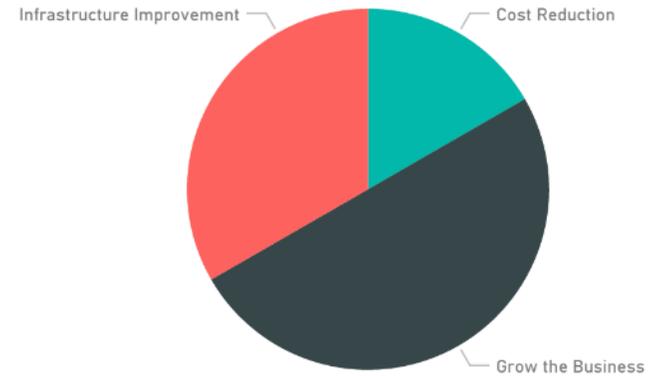
# of Late Projects

6

Late Projects



Late Projects by Goal

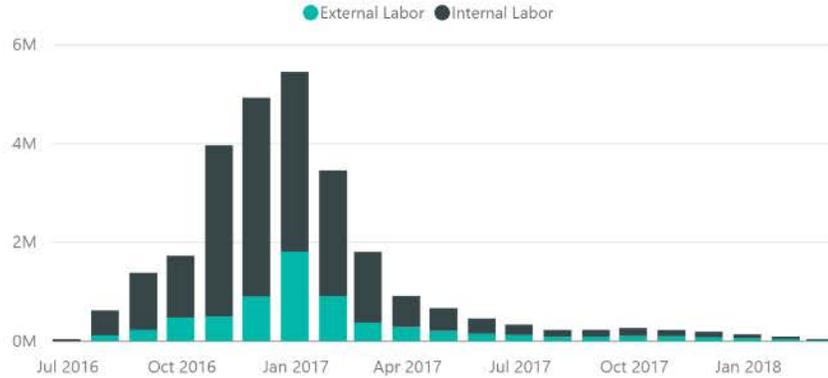


Investment Name	Investment Manager	Goal	Stage	Start Date	Finish Date	Baseline Start	Baseline Finish	Days Late	Average of Days Late %
PCI Controls Remediation	Reed, Henry	Infrastructure Improvement	Initiation	11/14/2016	3/9/2017	11/14/2016	3/3/2017	6	6.00
Client Services Datamart	Martin, Paul	Infrastructure Improvement	Planning	10/14/2016	2/8/2017	10/14/2016	2/2/2017	18	5.00
Executive Dashboard Visibility	Berks, Paul	Cost Reduction	Building	10/14/2016	2/6/2017	10/14/2016	2/2/2017	4	4.00
Meeting Reservation Portal	Tanner, Paul	Grow the Business	Initiation	10/14/2016	4/17/2018	10/14/2016	4/13/2018	4	1.00
CRM Enhancements	Riviera, Alex	Grow the Business	Closing	8/15/2016	12/23/2016	7/5/2016	11/14/2016	117	29.00
CRM Contact Center Development	Riviera, Alex	Grow the Business	Building	7/15/2016	12/12/2016	6/14/2016	10/28/2016	135	33.00
<b>Total</b>								<b>284</b>	<b>17.67</b>

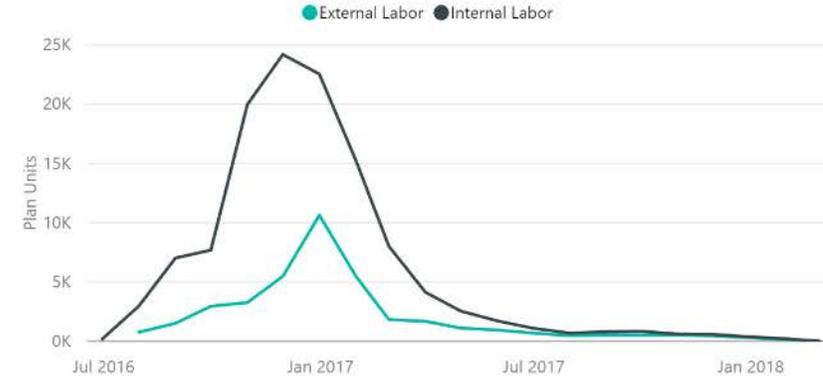
# CA PowerBI – Portfolio

Portfolio	Calendar Year	Total Spend	Internal Labor Cost	External Labor Cost	Internal Labor Hours	External Labor Hours
<input type="checkbox"/> Business Unit 1 <input type="checkbox"/> Business Unit 2 <input type="checkbox"/> Business Unit 4 <input type="checkbox"/> Business Unit 5 <input type="checkbox"/> Business Unit 6 <input type="checkbox"/> Business Unit 7	<input type="checkbox"/> 2018 <input type="checkbox"/> 2017 <input type="checkbox"/> 2016	27.22M	20.49M	6.73M	121.46K	39.28K

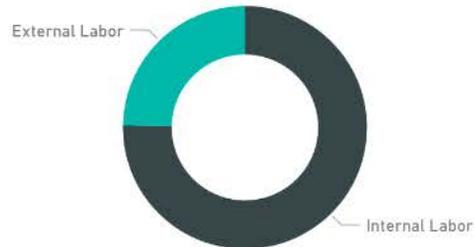
Internal vs. External Labor Costs by Fiscal Period



Internal vs. External Units (Hours) by Fiscal Period



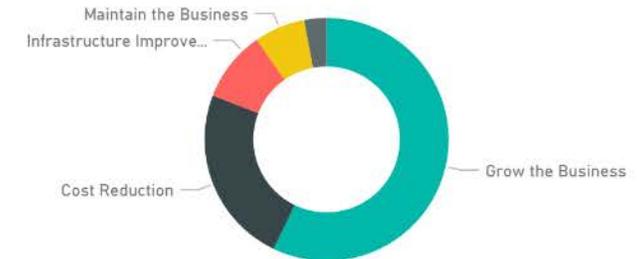
Plan Cost by Plan Transaction Class



Plan Cost by Plan Cost Type

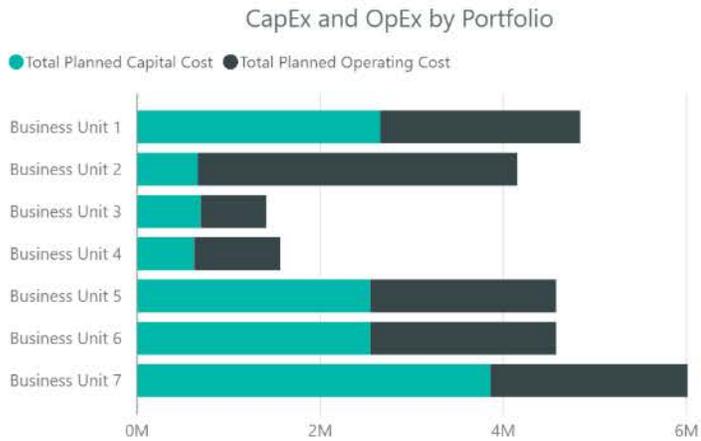


Plan Cost by Goal



# CA PowerBI – Portfolio

# of Investments: 101  
 Total Cost: 27.13M  
 Total CapEx: 13.60M  
 Total OpEx: 13.53M  
 Total Benefits: 51.23M  
 # High Priority Risks: 4  
 # of Late Projects: 6



Investment Name	Investment Manager	Investment Type	Goal	Total Planned Cost	Total Planned Capital C
4G Upgrade Readiness	Reed, Henry	Project	Infrastructure Improvement	719,880.00	373,680
AP Architecture Consolidation	Martin, Paul	Idea	Infrastructure Improvement	500,000.00	100,000
Automated Security Enhancements	Berks, Paul	Project	Grow the Business	943,200.00	474,000
BI Analytics	Riviera, Alex	Project	Grow the Business	726,000.00	280,800
BrightStor HSM Hierarchical Storage Manag...	Miller, Veronica	Asset	Cost Avoidance	30,000.00	0
BYOD Management	Tanner, Paul	Project	Cost Avoidance	343,020.00	228,600
CA Wily Introscope	Lewis, Paul	Asset	Infrastructure Improvement	20,000.00	0
CA Wily Portal Manager	Lewis, Paul	Asset	Infrastructure Improvement	175,000.00	125,000
Client Services Datamart	Martin, Paul	Project	Infrastructure Improvement	656,400.00	247,200
Cloud Computing Enhancements	Martin, Paul	Idea	Grow the Business	500,000.00	50,000
<b>Total</b>				<b>27,126,660.00</b>	<b>13,595,840.00</b>



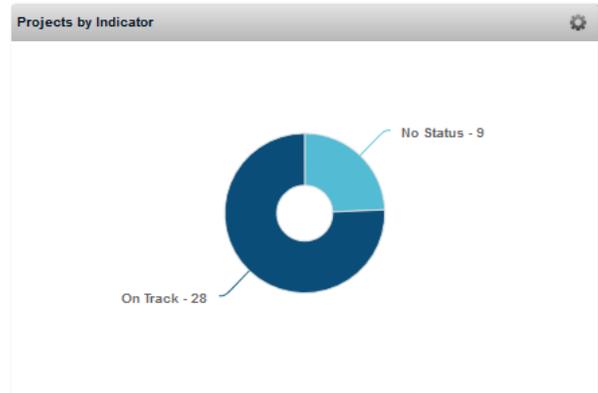
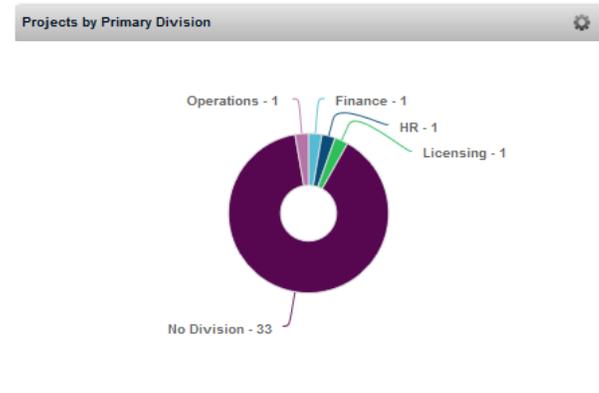
# Samples: RegoXchange

*rego*University 2017

# Rego Xchange – Executive Dash

## Executive Dashboard: Executive Dashboard

OBS Unit:  Region: All  Division: All  Goal: All  Portfolio:  Project Manager:  Filter More

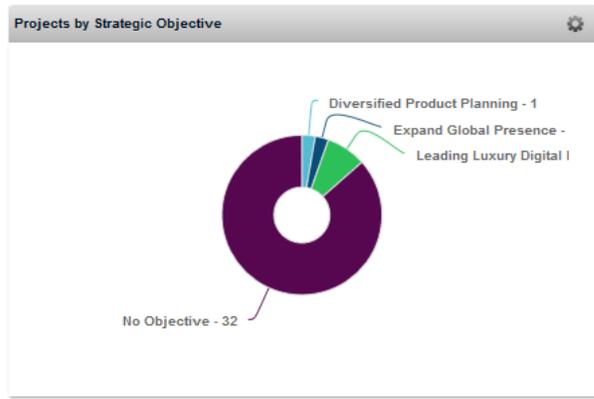
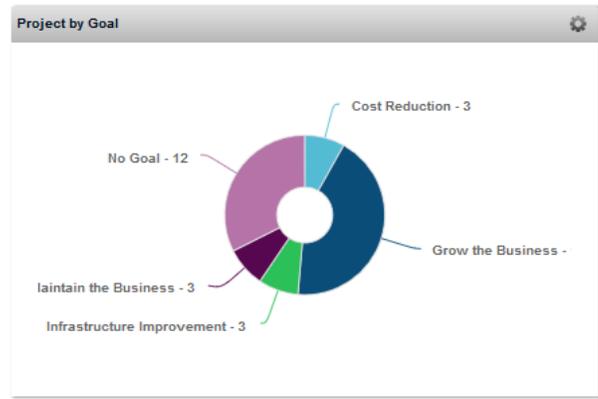
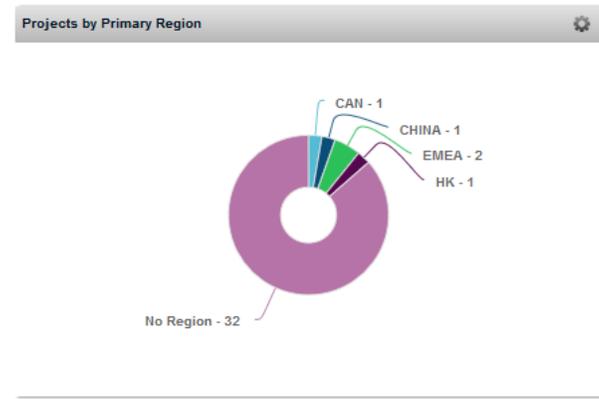


### Action Items

View: Action Items Assigned to Me

Action Item	Created By	Due	Status	Is Proxy
New Idea Submitted: 001 New Idea	Tom Anderson	3/27/17 3:00 AM	Open	
New Idea Submitted: Kronos Venlo Implementation	Tom Anderson	3/27/17 3:00 AM	Open	
New Idea Submitted: Test	Tom Anderson	3/27/17 3:00 AM	Open	
Test 2	Tom Anderson	4/17/17 3:00 AM	Open	
Test	Tom Anderson	4/17/17 3:00 AM	Open	
Approve Document	Tom Anderson	4/17/17 3:00 AM	Open	

[New](#)



### Executive Non-Drill

CRF#	Name	Exec Sponsor	Start	Finish	Overall	Schedule	Scope	Cost/Effort	CAPEX Budget	CAPEX Planned	CAPEX Actuals	CAPEX Var	OPEX Budget	OPEX Planned	OPEX Actuals	OPEX Var
	INTURN	Bakst, Anna	11/01/2015	10/07/2016	🟡	🔴	🔴	🟢	0	0	0	0	0	0	0	0
	Wearables Launch		02/01/2016	10/31/2016	🟡	🟡	🟢	🔴	0	0	0	0	0	0	0	0
IT0137A	Global Retail Pricing Project Phase 1	Chan, Michele	01/04/2016	11/21/2016	🟡	🔴	🔴	🔴	0	2,050,600	0	(2,050,600)	0	0	0	0

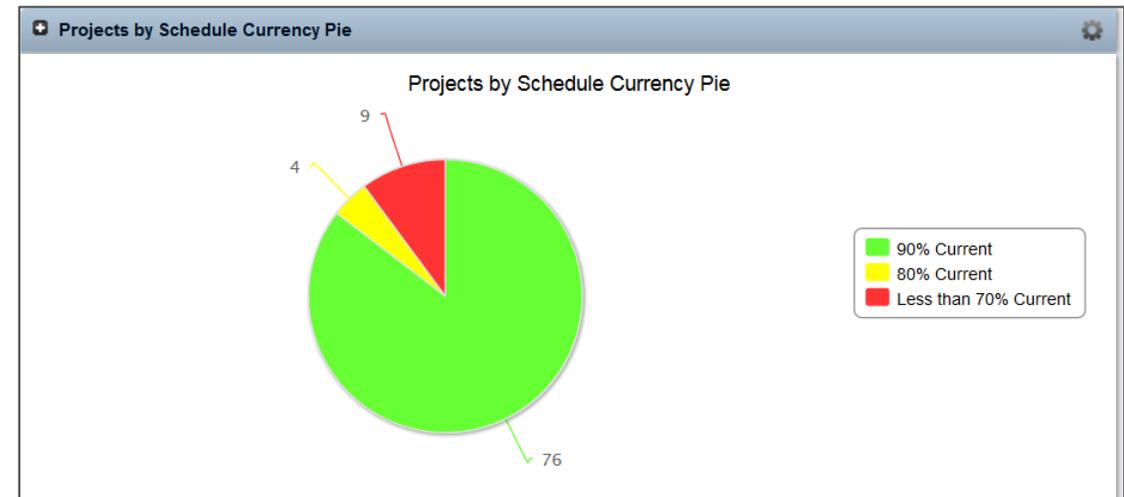
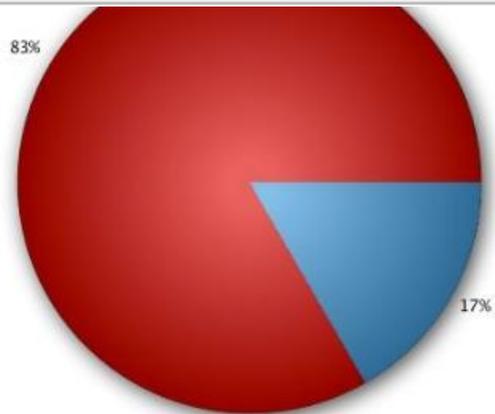
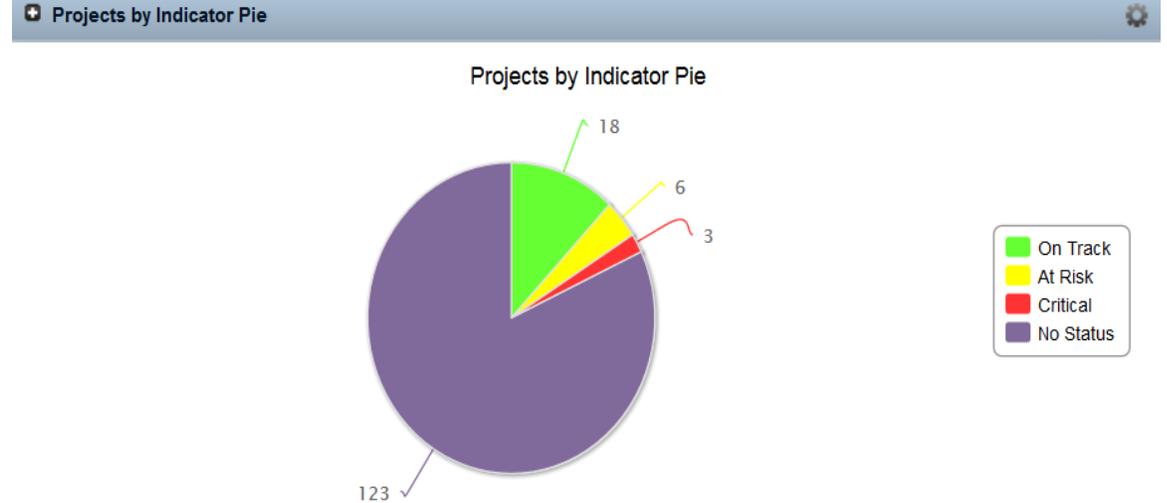
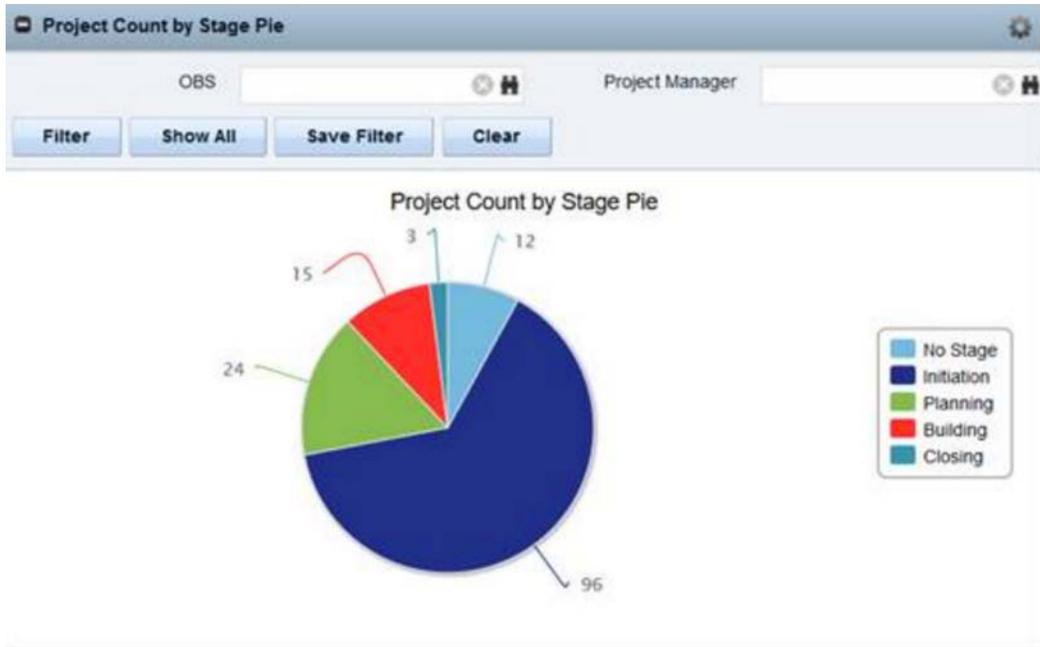
# regoXchange – Exec Dashboard

Executive Dashboard

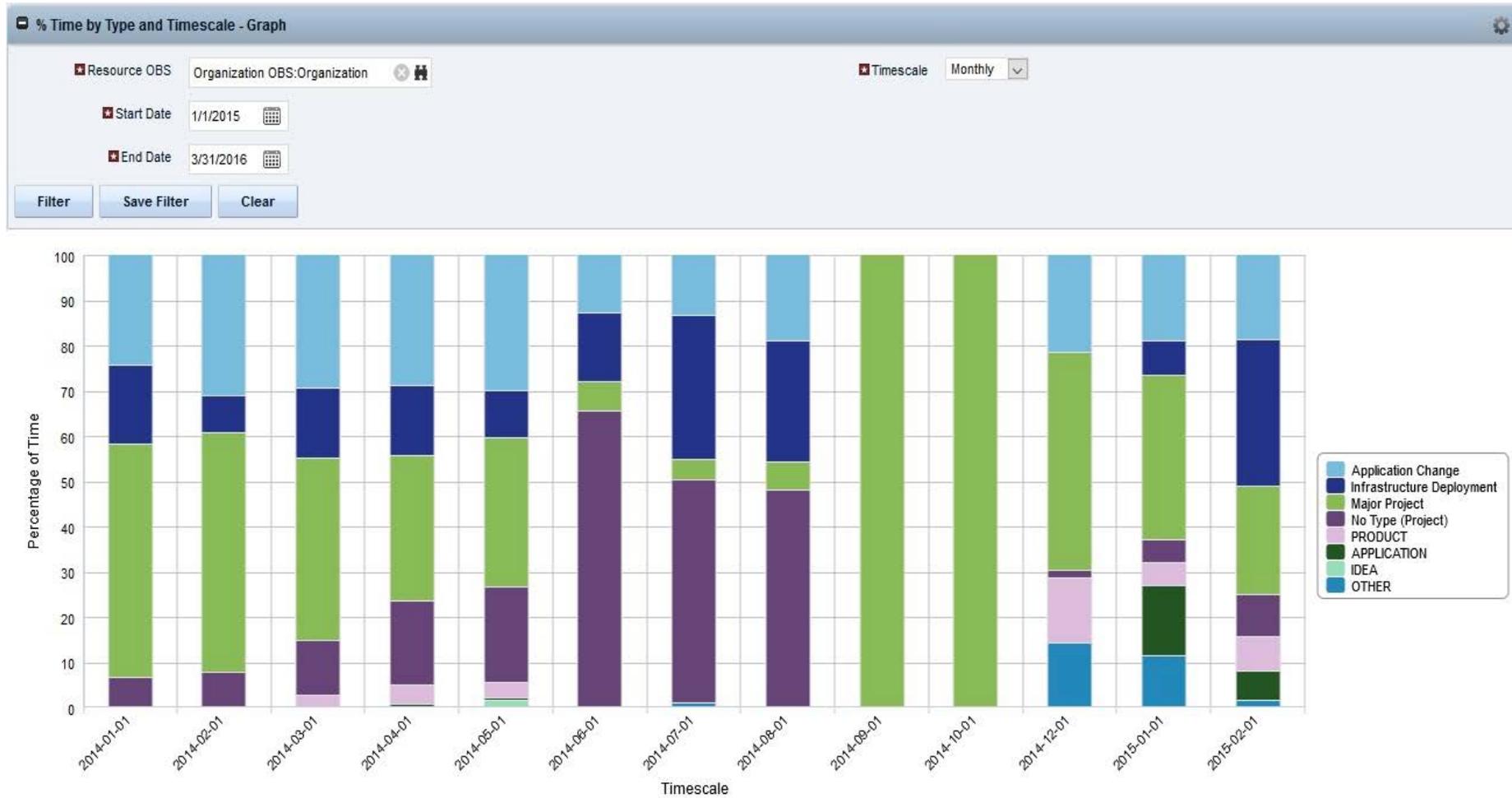
Project OBS: Department:Development  Project Manager ID:

Name	ID	Overall Status	Schedule Status	Scope Status	Cost/Eft Status	Late AI	Late Issues	Late Risks	Late Tasks	Late Milestones	Sched Var	Effort Var	Hrs Past Base	Days Over Base
Computer System Analysis	PRJ9019	✖	✔	⚠	✖	✖ 2	✖ 2	✖ 2	✖ 5	✖ 1	✔ 0	✔ 0	✔ 0	✔ 0
Consumer Reviews	PRJ909	⚪	⚪	⚪	⚪	✔ 0	✖ 2	✖ 2	✖ 3	✔ 0	✔ 0	✖ (64)	✖ (656)	✔ 0
Fitness Porgram	prj04	⚪	⚪	⚪	⚪	✖ 1	✔ 0	✔ 0	✖ 3	✖ 1	✔ 0	✖ (191)	✖ (1,056)	✔ 0
Test Deletion Process	PRTTestDeletionProces	⚪	⚪	⚪	⚪	✔ 0	✔ 0	✔ 0	✔ 0	✔ 0	✔	✔	✔	✔ 0
Dave Test	dtest	⚪	✔	✔	⚪	✔ 0	✔ 0	✔ 0	✖ 3	✖ 1	✔ 19	✔ 44	✔ 0	✔ 0

Displaying 1 - 5 of 5



# regoXchange – Time By Type



# regoXchange – Resource Management

RM Governance

Resource OBS  Resource Manager

OBS Mode: Unit and descendants

Filter Show All Save Filter Clear

Resource	Availability Hours (2 Weeks)	Allocation Hours (2 Weeks)	Allocation vs Availability (2 weeks) %	Assignment Hours (2 Weeks)	Allocation vs Assignment (2 weeks) %	Availability Hours (4 Weeks)	Allocation Hours (4 Weeks)	Allocation vs Availability (4 weeks) %	Assignment Hours (4 Weeks)	Allocation vs Assignment (4 weeks) %	Availability Hours (8 Weeks)	Allocation Hours (8 Weeks)	Allocation vs Availability (8 weeks) %	Assignment Hours (8 Weeks)	Allocation vs Assignment (8 weeks) %
Administrator, Niku	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Doe, John	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Zywiec, David	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Wuenstel, Chris	80	160	●	80	▲	160	320	●	160	▲	240	480	●	240	▲
Admin, PMO	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Hensel, Ross	80	8	▲	8	■	160	16	▲	16	■	240	24	▲	24	■
Hackney, Ron	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Trainor, Pat	80	0	▲	0	▲	160	0	▲	0	▲	240	0	▲	0	▲
Kent, Clark	80	160	●	160	■	160	320	●	320	■	240	480	●	480	■
Alfred, Al	80	8	▲	8	■	160	16	▲	16	■	240	24	▲	24	■

# Rego Xchange – Resource Utilization

**OBS Utilization Percentage**

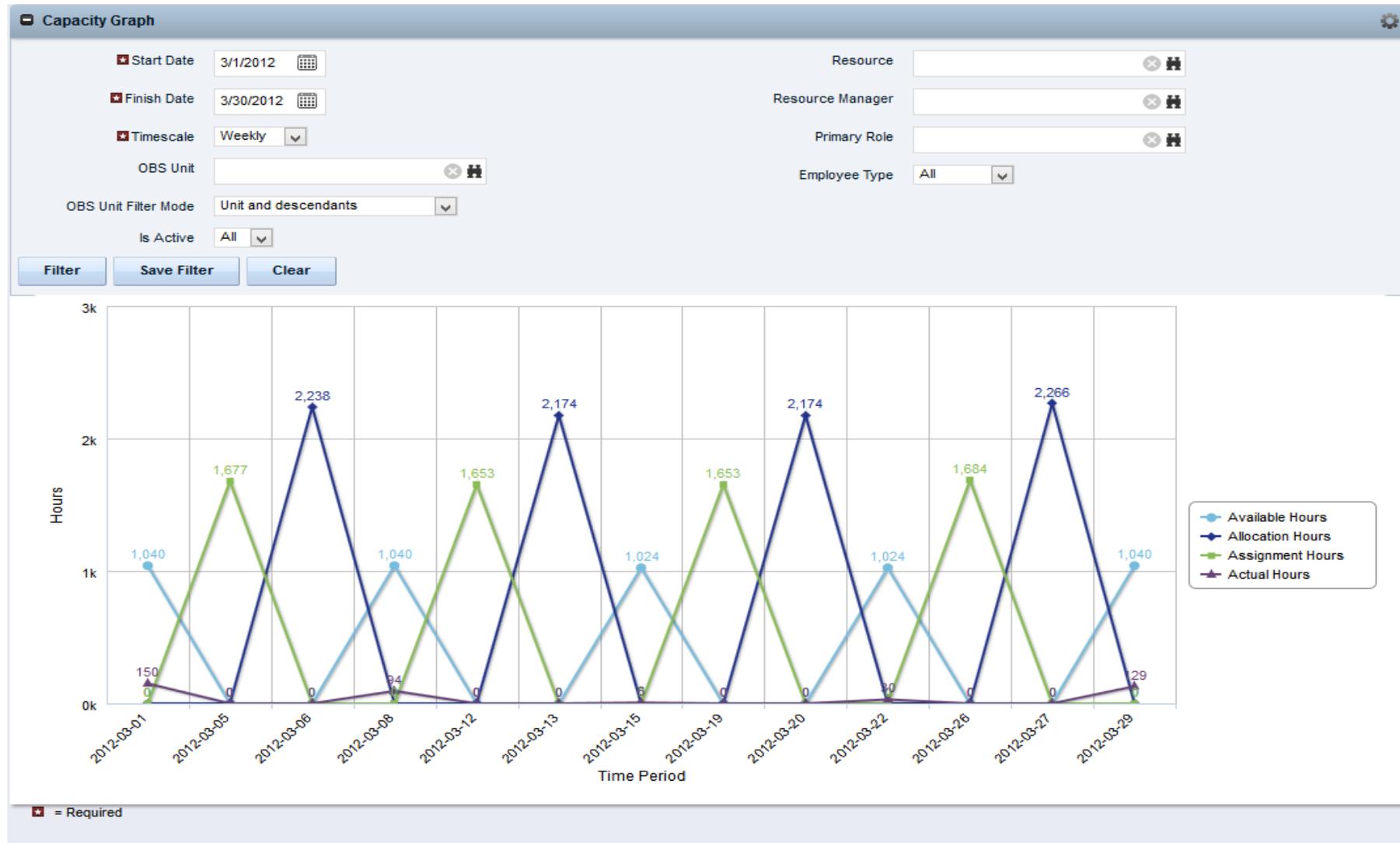
OBS Type: Organization OBS  
 Start Date: 2/1/2015  
 Finish Date: 5/31/2015  
 Resource Open for Time?: All

Filter Save Filter Clear

OBS Unit	02/01/2015			03/01/2015			04/01/2015			05/01/2015		
	Actuals	Availability	Utilization Percentage									
Organization	292	3,164	9%	0	3,406	0%	0	3,192	0%	0	3,024	0%
Business	114	1,892	6%	0	1,998	0%	0	1,912	0%	0	1,848	0%
Finance	82	612	13%	0	598	0%	0	528	0%	0	504	0%
HR	0	320	0%	0	352	0%	0	352	0%	0	336	0%
Payroll	0	160	0%	0	176	0%	0	176	0%	0	168	0%
Sales	32	320	10%	0	344	0%	0	328	0%	0	336	0%
IT	138	632	22%	0	704	0%	0	576	0%	0	504	0%
Business Intelligence	0	160	0%	0	176	0%	0	176	0%	0	168	0%
Clarity Group	48	312	15%	0	352	0%	0	224	0%	0	168	0%
Development	96	320	30%	0	352	0%	0	352	0%	0	336	0%
HelpDesk	0	160	0%	0	176	0%	0	176	0%	0	168	0%
Project Management	0	780	0%	0	858	0%	0	858	0%	0	819	0%

= Required

# regoXchange: Allocation-Availability-Actual



# Samples: Custom Dashboards

*rego*University 2017



### Resource OBS Filter

### Overtime Heatmap

Resource Name	Week41	Week42	Week43	Week44
Dhar, Sankhadeep	40	40	44	40
Evans, Nick	40	50	55	64
Hayes, Justin	40	35	30	30

### Unfilled Demand

Investment Name	Role Name	Staffing OBS	December	November	October
Automated Security Enhancements	Architect		50	45	10
	Business Ana...		10	20	50
CRM Enhancements	Architect		60	50	40
eCommerce Portal	Business Ana...		20	31	10
	Test Engineer		20	10	11

### Task List

Investment	Task Name	Assigned To	Days...	Due Date
CRM Enhancements	Deployment Phase G...	Evans, Nick	34	7/1/16
eCommerce Portal	Planning Phase Gate...	Evans, Nick	32	5/9/16
eCommerce Portal	Initiating Process Co...	Dhar, Sankhadeep	29	3/1/16

### Risk List

Investment	Risk	Assigned To	Due Date	Is Late
eCommerce Portal	Objectives Risk	Dhar, Sankhadeep	12/10/16	0
CRM Enhancements	New enhancements req...	Dhar, Sankhadeep	7/20/16	1
eCommerce Portal	Focal point for changes	Evans, Nick	12/1/16	0
CRM Enhancements	Enhancements could af...	Hayes, Justin	7/13/16	1
Automated Security Enhancements	Base Architecture	Evans, Nick	10/20/16	1

### Issue List

Investment	Issue	Assigned To	Due Date	Is Late
eCommerce Portal	More RAM required	Dhar, Sankhadeep	11/1/16	1
CRM Enhancements	Java scripts running on...	Evans, Nick	12/10/16	0
Automated Security Enhancements	Enhancements could af...	Hayes, Justin	1/1/17	0



Persona: Resource Manager

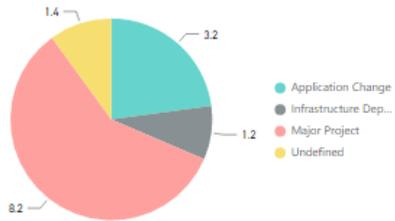
#### Filter:

Allows you to filter based on Resource OBS and see different levels of the organization (Include units and decedents)

#### KPIs/Metrics Tracked:

1. Total Headcount - Employee, Consultant, Contractor Ratio
2. Assigned Labor vs. Unfilled Roles by project
3. Capacity (available, allocation, assignment, actuals)
4. Assigned Risks/Issues
5. Upcoming Unfilled Demand (next 3-6 months)
6. Allocation distribution vs Actuals by project type.
7. Overtime Trending Report (who is consistently working overtime)
8. Resource count by investment

### Allocation by Project Type

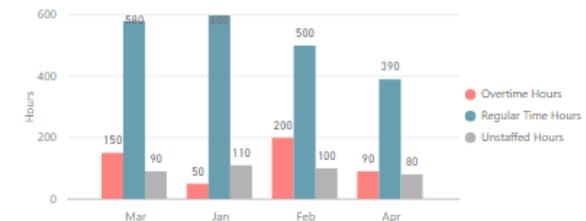


### My Resource Count by Project

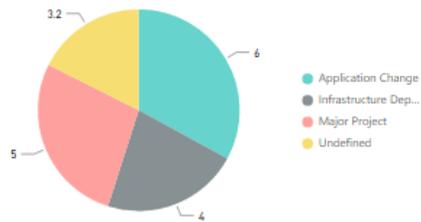
Project Name	Project Manager	Project S...	Project FL...	Tea...	Mana...	% Ma...
Clean Waterhouse	Dhar, Sankhadeep	Approved	8/21/2015 11/20/2018	5	1	20
Computer System...	Dhar, Sankhadeep	Approved	8/21/2015 12/4/2019	3	2	67
Consumer Revie...	Dhar, Sankhadeep	Approved	4/7/2016 9/4/2020	6	3	50
Create Webcam ...	Hayes, Justin	Approved	4/7/2016 10/17/208	2	1	50
Fitness Program	Dhar, Sankhadeep	Approved	6/27/2015 9/28/2017	4	3	75

Project Active

### Capacity Graph



### Actuals by Project Type



## PPM Dashboard

Select All Midwest Northeast Southeast West

**46.74M**  
Planned Capital

**6.50M**  
Planned Expense

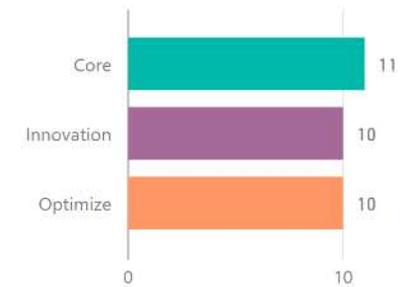
**36.29M**  
Funded Capital

**4.82M**  
Funded Expense

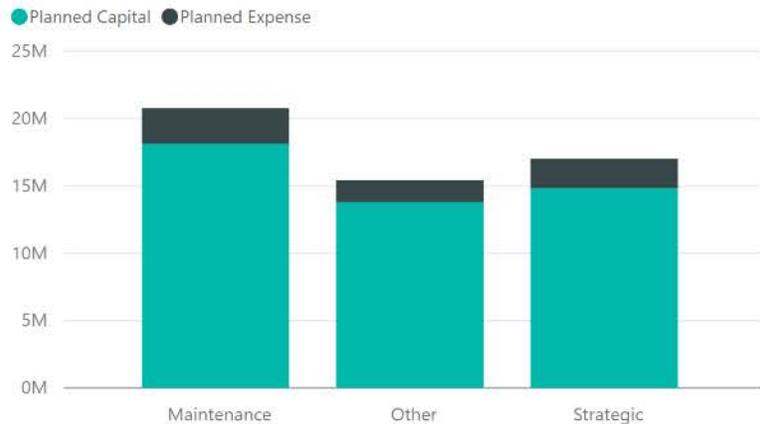
Planned Capital and Actual Capital



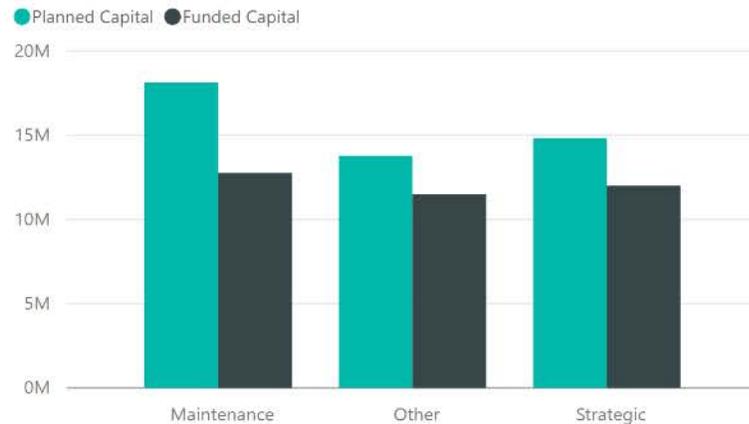
Count of Goal by Goal



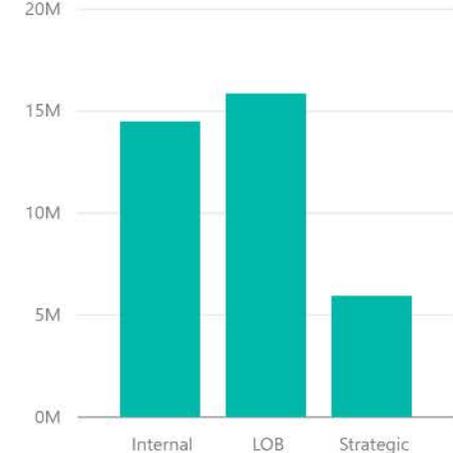
Planned Capital and Planned Expense by Category



Planned Capital and Funded Capital by Category

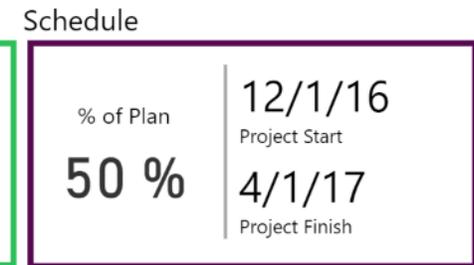
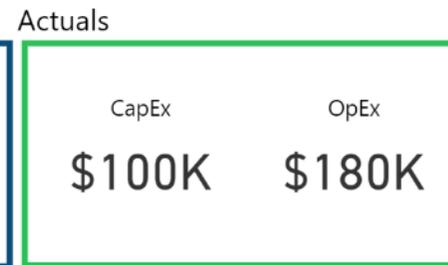
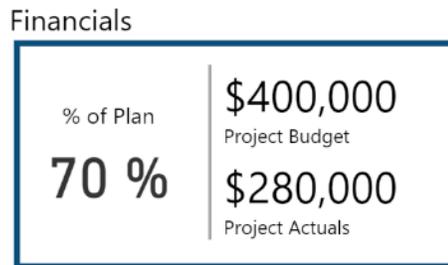
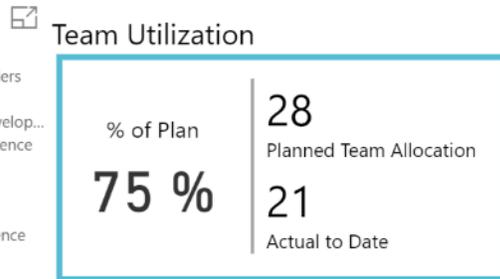


Funded Capital by Funding Category



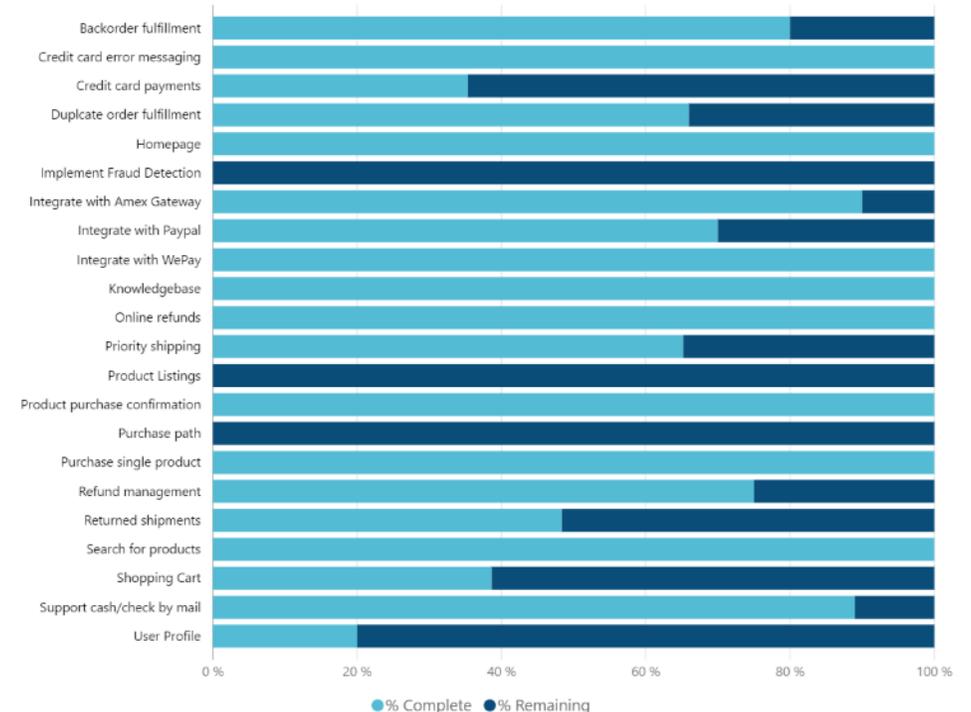
# Project Management

- Project
- Build read-write API for handling Orders
  - Collaboration Enhancements
  - FY18 Order Management System Develop...
  - Integrate Social into Shopping Experience
  - Maintain legacy purchasing system
  - Minimal Online Shopping Site
  - Modernize customer service portal
  - Personalized online shopping experience



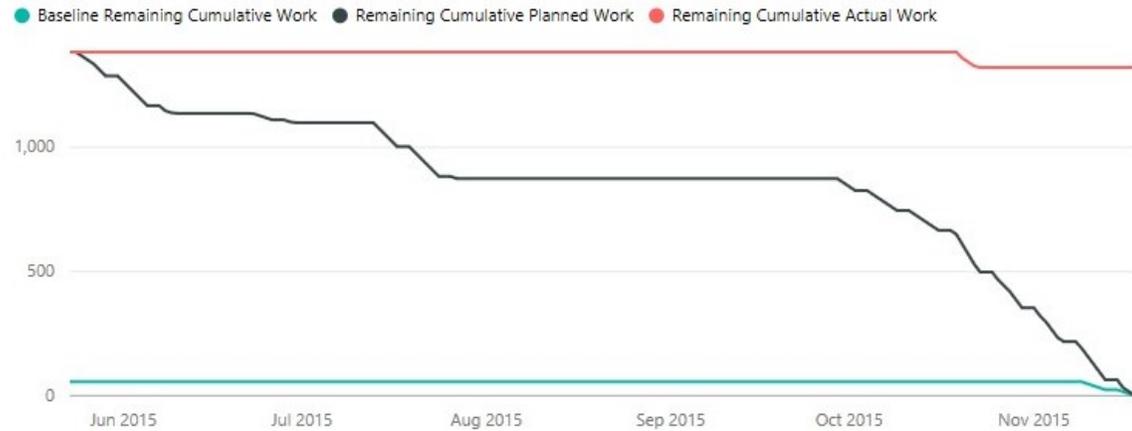
Feature	Feature ID	Est. Storypoints	Storypoints Accepted	% Complete	Actuals	Actual Cost	Start	Finish
Backorder fulfillment	F37	50	40	80 %	0	\$0	12/15/16	5/29/17
Credit card error messaging	F24	80	80	100 %	0	\$0	12/15/16	5/29/17
Credit card payments	F9	82	29	35 %	199	\$29,922	1/21/17	3/25/17
Duplicate order fulfillment	F38	60	40	66 %	0	\$0	12/15/16	5/29/17
Homepage	F46	12	12	100 %	218	\$32,754	1/21/17	2/21/17
Implement Fraud Detection	F28	0	0	0 %	0	\$0	4/16/17	5/23/17
Integrate with Amex Gateway	F35	100	90	90 %	0	\$0	12/15/16	5/29/17
Integrate with Paypal	F18	100	70	70 %	0	\$0	12/24/16	1/24/17
Integrate with WePay	F19	70	70	100 %	0	\$0	2/19/17	4/3/17
Knowledgebase	F45	23	23	100 %	240	\$35,925	1/21/17	2/21/17
Online refunds	F17	60	60	100 %	0	\$0	12/15/16	1/24/17
Priority shipping	F11	23	15	65 %	132	\$19,871	1/21/17	3/22/17
Product Listings	F25	0	0	0 %	0	\$0	5/4/17	5/29/17
Product purchase confirmation	F47	10	10	100 %	231	\$34,712	1/21/17	2/21/17
Purchase path	F10	90	0	0 %	0	\$0	2/7/17	3/28/17
Purchase single product	F44	18	18	100 %	169	\$25,354	1/21/17	2/21/17
Refund management	F20	80	60	75 %	0	\$0	2/16/17	3/19/17
Returned shipments	F48	31	15	48 %	190	\$28,470	1/21/17	2/21/17
Search for products	F49	4	4	100 %	182	\$27,368	1/21/17	2/21/17
Shopping Cart	F1	44	17	39 %	119	\$17,874	1/21/17	3/19/17
Support cash/check by mail	F36	78	70	89 %	0	\$0	12/15/16	5/29/17
User Profile	F23	25	5	20 %	185	\$27,750	1/21/17	4/29/17
<b>Total</b>					<b>1865</b>	<b>\$280,000</b>		

% Complete and % Remaining by Feature

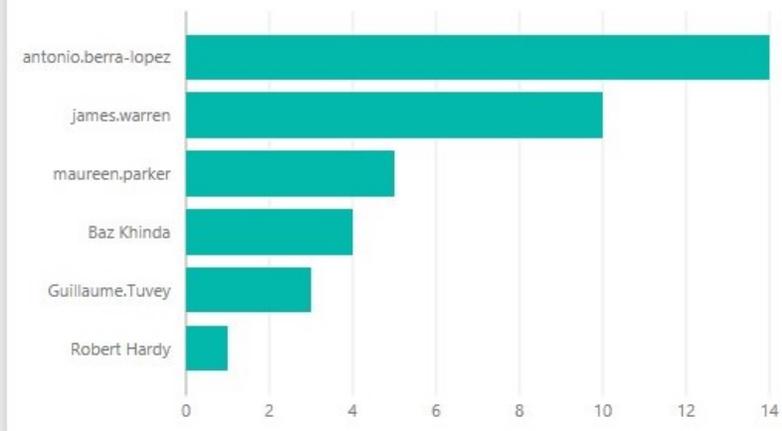


# Program Management

Baseline Remaining Cumulative Work, Remaining Cumulative Planned Work, Remaining Cumulative Actual Work IN THE PAST SIX MONTHS



Projects Not Updated in the Last Month or with Incomplete Work in the Past BY OWNER



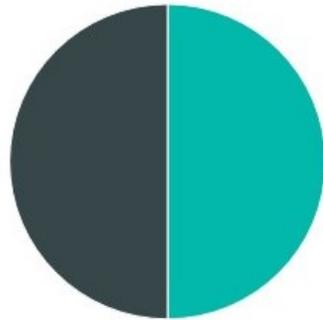
Active Issues

8

Active Risks

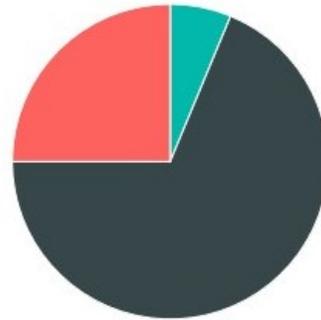
16

Active Issues BY PRIORITY



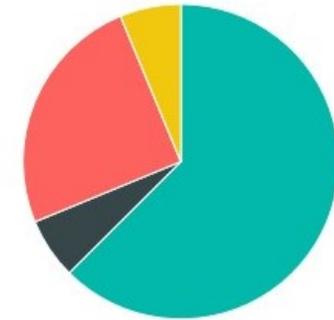
Priority (2) Medium (1) High

Active Risks BY PROBABILITY



Probability 0.10 1.00 3.00

Active Risks BY IMPACT

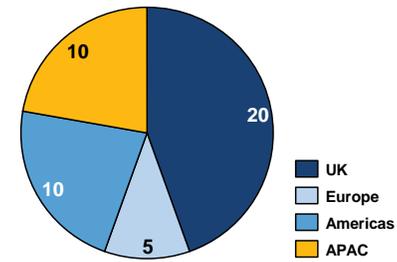
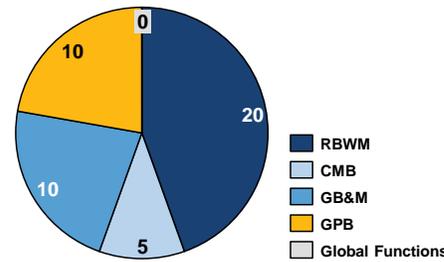
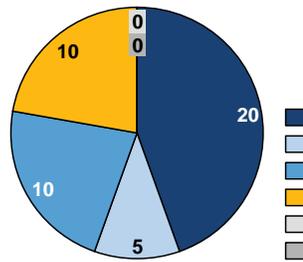


Impact 1.00 2.00 3.00 7.00

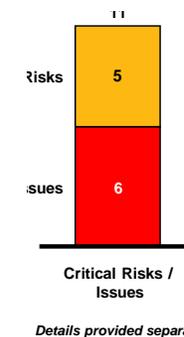
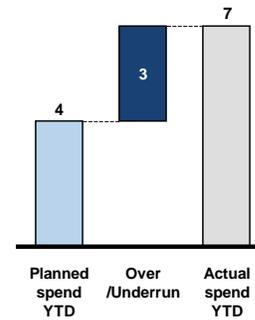
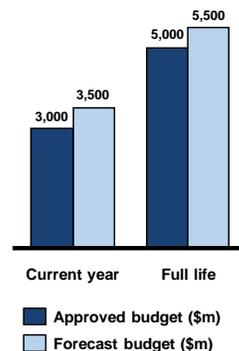
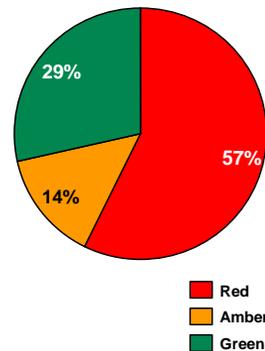
## Portfolio Dashboard – Key Metrics

Top 200 Priority Programmes (30 April, 2012)

Report Criteria:		Data Availability (% of programmes)	
Programme Priority	High priority only	Programme categories	100%
Investment Category	All	Programme RAGs	100%
Business Partner	All	Programme Budget	100%
Region	All	Programme Spend	100%
Approval status / stage	Approved	Programme Risks/Issues	100%

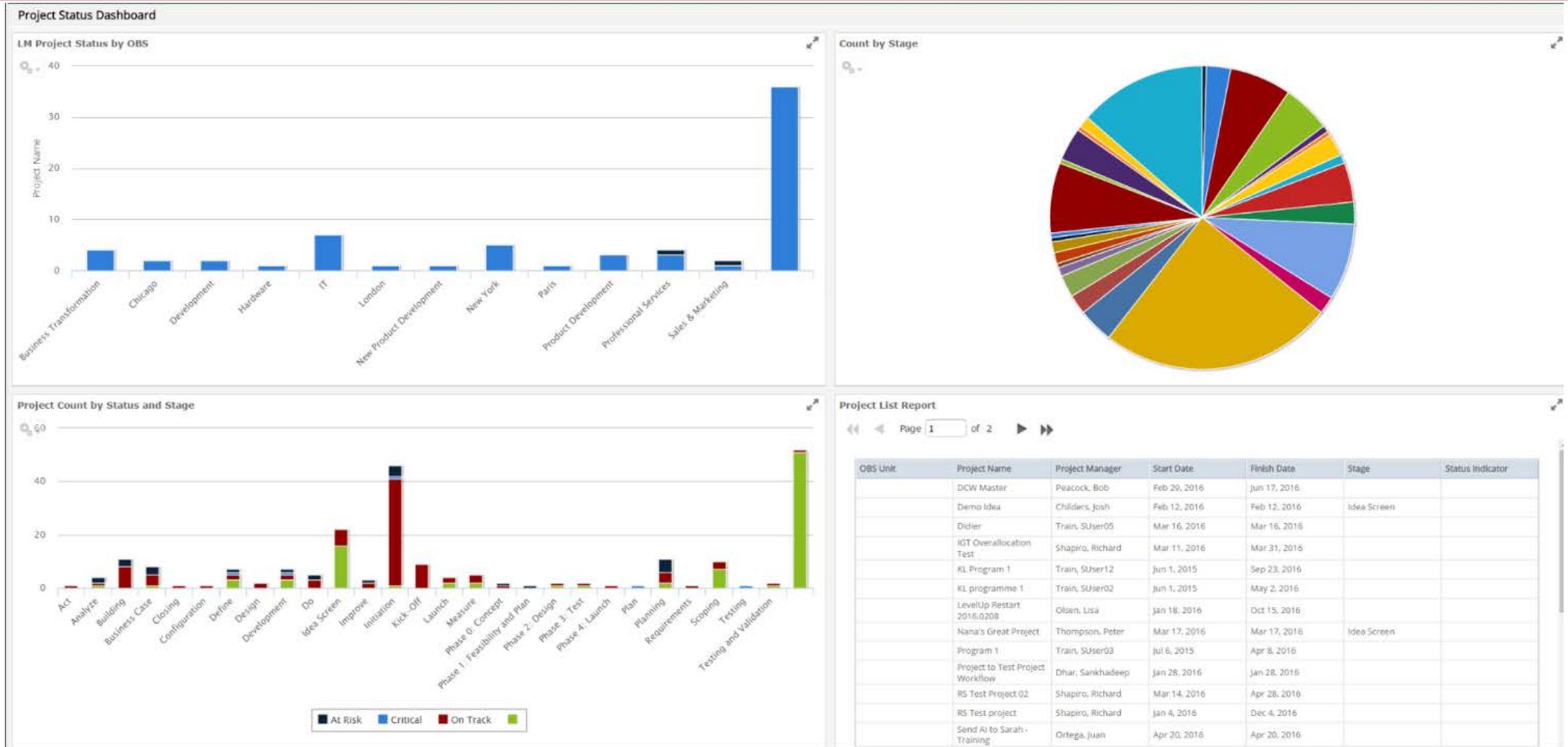


### Portfolio status (approved in-flight initiatives)

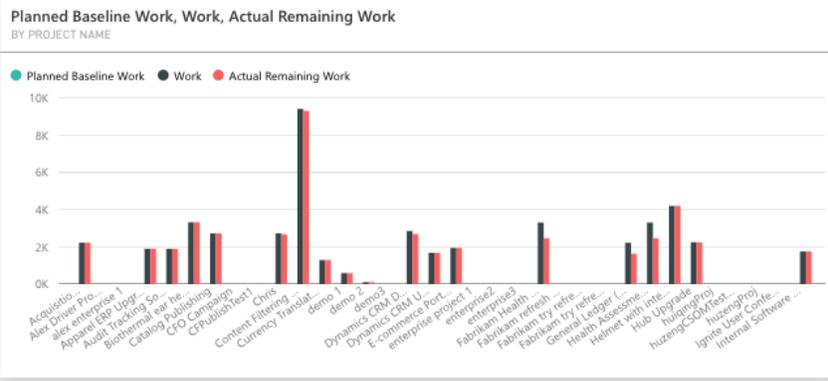


Details provided separately

# Portfolio Management

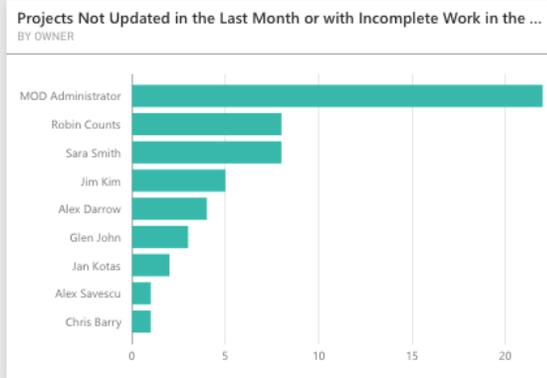


# Portfolio Management



### Overdue and Upcoming Milestones

Finish Date	Overdue and Upcoming Milestone	Project Name
4/23/2013	Project Approved	KCTestProjectTestEmailNotification
6/18/2013	Project Closed	KCTestProjectTestEmailNotification
10/21/2013	Unit testing complete	Fabrikam Health Assessment Reporting Tool
10/21/2013	Unit testing complete	Health Assessment Reporting Tool
10/24/2013	Design complete	Fabrikam Health Assessment Reporting Tool
10/24/2013	Design complete	Health Assessment Reporting Tool
11/8/2013	Design complete	Dynamics CRM Deployment EMEA
11/8/2013	Design complete	General Ledger (GL) currency update
11/12/2013	Business Strategy Landscape Review Complete	Content Filtering Design and Implementation
12/9/2013	Budget complete	General Ledger (GL) currency update
12/11/2013	Decision point - go/no-go to development st...	Squash and Racquet Ball Eye Wear
12/23/2013	Documentation complete	Dynamics CRM Deployment EMEA
12/25/2013	Documentation complete	Fabrikam Health Assessment Reporting Tool
12/25/2013	Documentation complete	Health Assessment Reporting Tool
12/30/2013	Unit testing complete	Dynamics CRM Deployment EMEA
1/6/2014	Finalization/validation complete	General Ledger (GL) currency update
1/6/2014	Training materials complete	Dynamics CRM Deployment EMEA



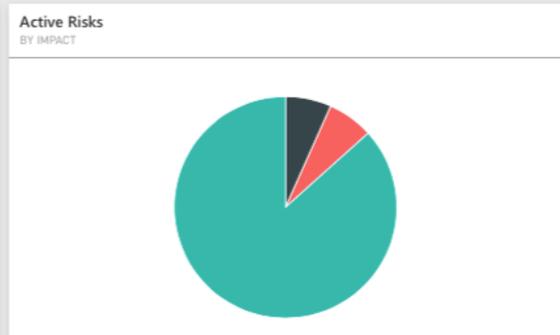
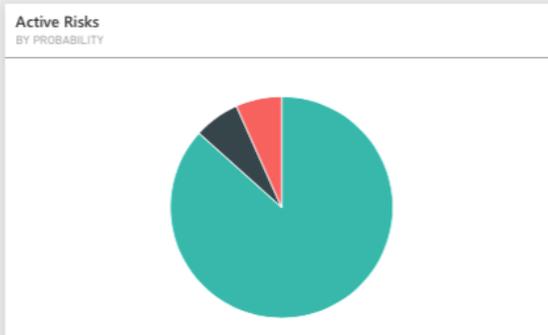
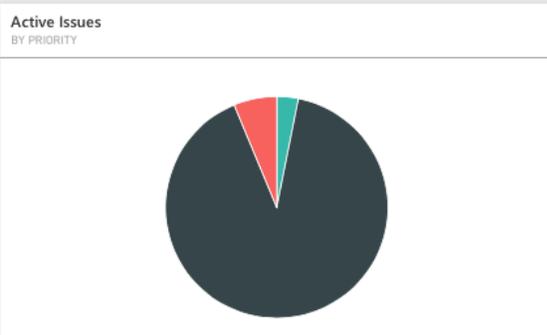
### Active Issues

32

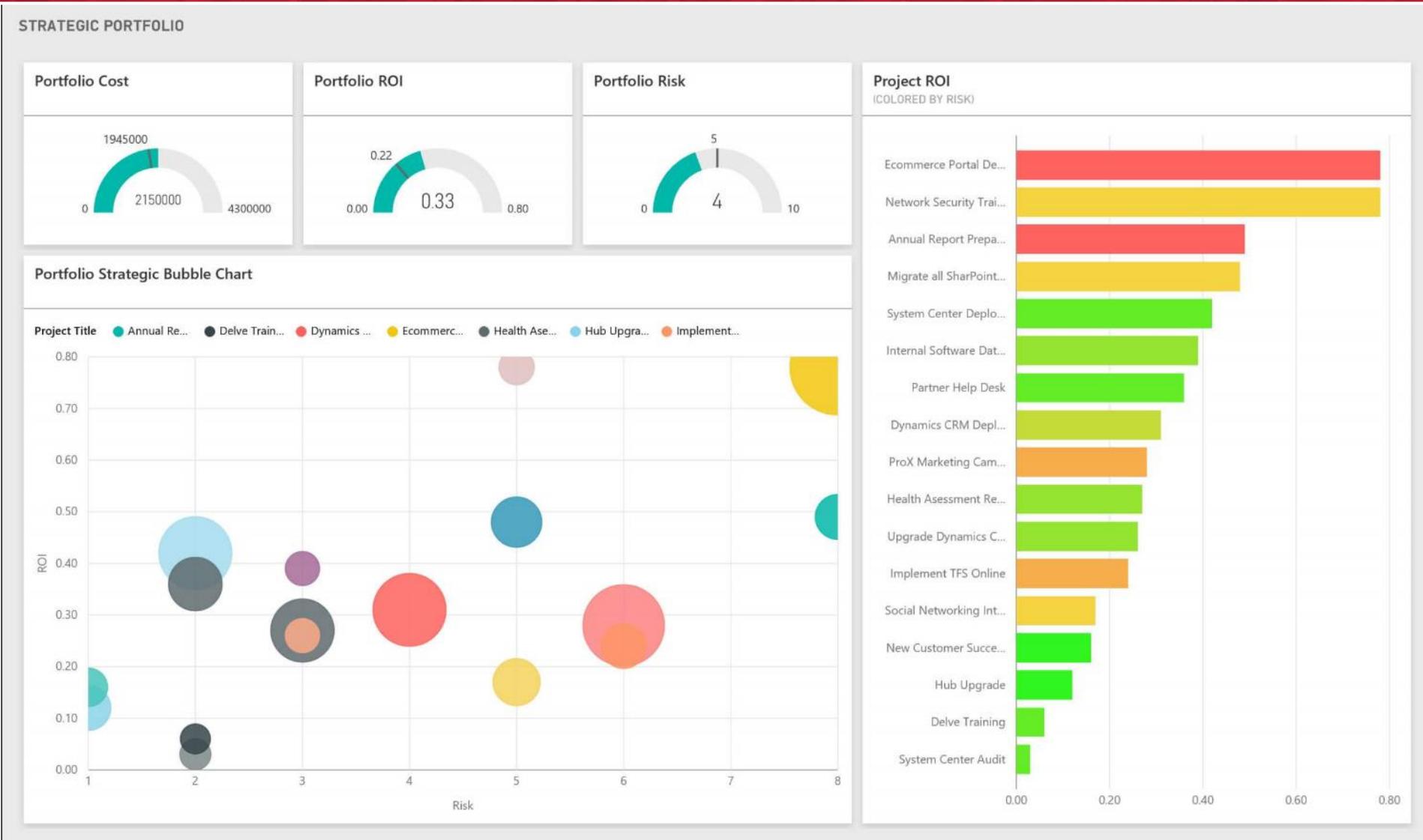
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### Active Risks

15



# Portfolio Management



# Portfolio Management

## ITPC Active Project Scorecard

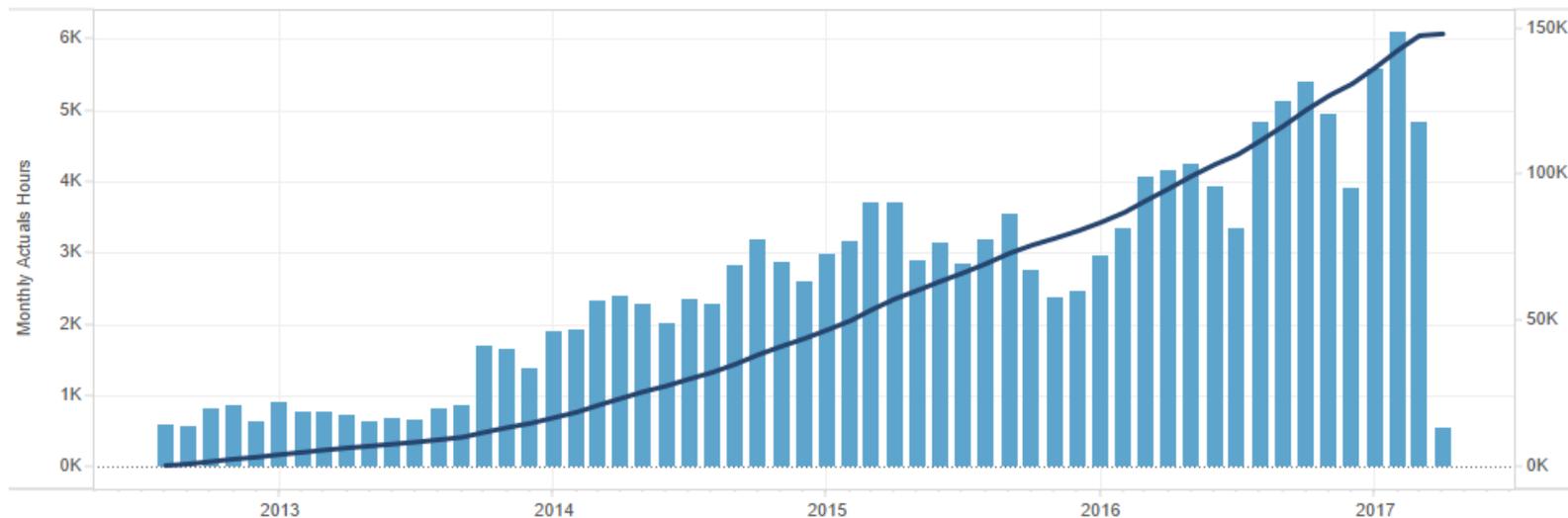
Project Name	Scheduled Finish Date	Project Mgr Name	Project Status as of Date	Project Status Comment	ETC Hours	Total Effort %	Schedule Status	Budget Status	Barrier Status
IAM Phase 2 Subproject	4/20/2020	Cobb, Cynthia	1/9/2017	This is a subproject of IT..	41,949	92%			
ITPC-0359 DARwin Upgrade to u.achieve	8/31/2017	Molitor, Christina	4/5/2017	All show stopper issues ..	242	448%	✗	✗	▲
ITPC-0368 Athletics NCAA CAI	7/3/2017	Neuhauser, Michelle	3/31/2017	No update this month.	399	75%	✗	●	●
ITPC-0375 Identity and Access Management (I..	2/3/2025	Cobb, Cynthia	3/9/2017	SiteMinder has been up..	3,017	55%	●	●	●
ITPC-0412 Online Course Catalog	8/31/2018	Fritchey, Daryl	3/31/2017	UIUC: UIUC CIM Cours..	245	98%	✗	●	▲
ITPC-0421 Employee Training Infrastructure A..	5/31/2017	Velazquez, Robyn	4/3/2017	A script and scoring she..	61	102%	✗	✗	●
ITPC-0442 GCO: Federal Financial Report Mod..	3/13/2017	Hill, Edward	2/1/2017	This was migrated to pro..	13	125%	✗	✗	●
ITPC-0463 Analysis and Implement PPACA Mo..	6/30/2017	Presson, Sherri	4/1/2017	Analysis and developme..	66	112%	▲	●	●
ITPC-0465 START myResearch	11/14/2018	Molitor, Christina	4/5/2017	AITS is working closely ..	34,741	104%	●	●	●
ITPC-0466 HireTouch Data Acquisition Phase ..	6/30/2017	Williamson, Tanya	4/3/2017	Received feedback from..	2,147	101%	●	●	●

## Project Actual Hours Over Time

ALL

Actual Hours by Resource (Select a Resource Name to Filter)  
All

Monthly Actuals Hours  
Overall Actual Hours



# Risk Management

## Risks

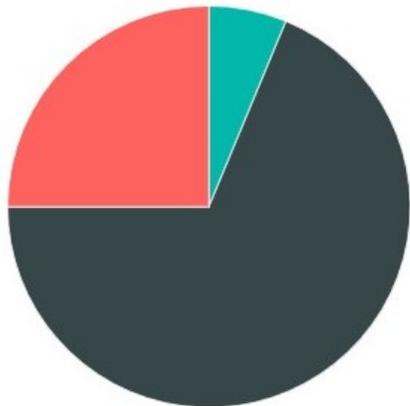
11/18/2015 9:10:00 AM

**16**  
Total Active Risks

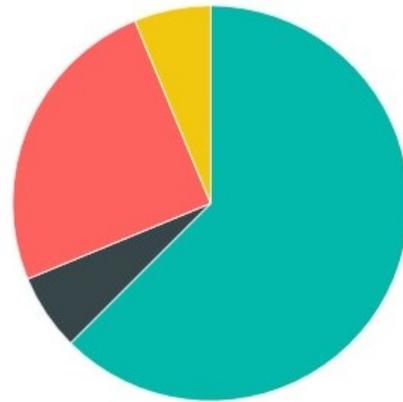
**1**  
Total Postponed Risks

**(Blank)**  
Risks Closed

Total Active Risks by Probability

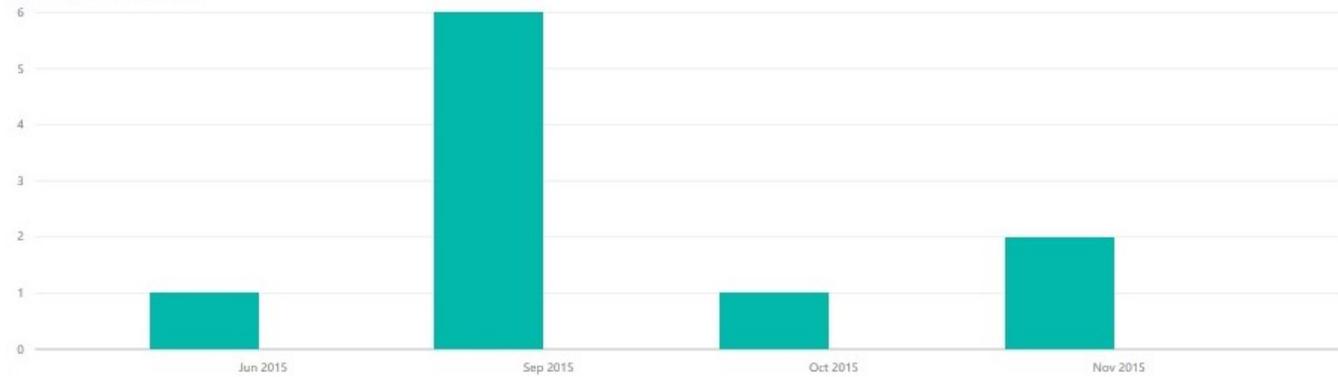


Total Active Risks by Impact



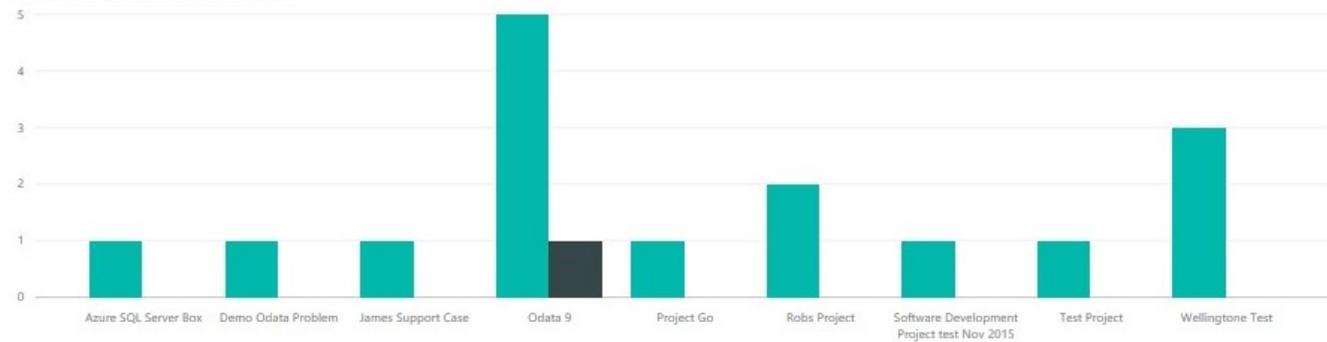
Risks Opened and Risks Closed by Month

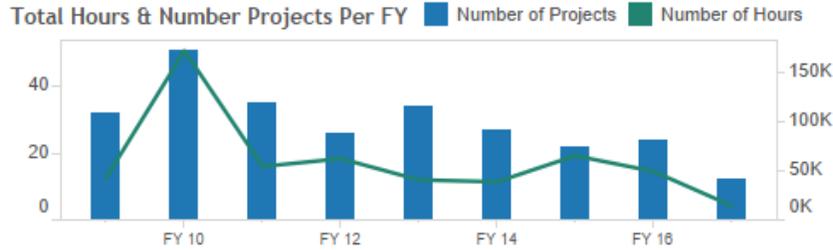
● Risks Opened ● Risks Closed



Total Active Risks and Total Postponed Risks by Project Name

● Total Active Risks ● Total Postponed Risks

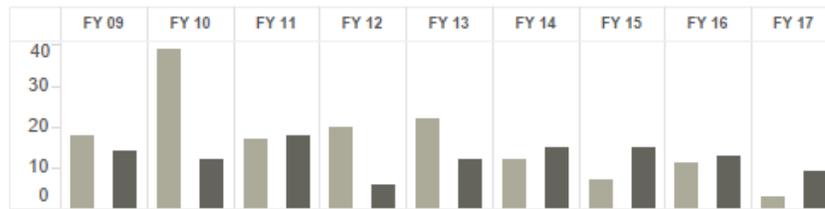




Number of Project Hours Per FY By Area

	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	FY 16	FY 17
HR	9,560	101,333	8,440	25,856	11,213	12,693	10,390	3,912	7,746
Finance	8,709	20,410	19,938	12,115	9,281	11,868	26,639	24,268	52
Student	6,272	5,714	8,922	1,615	7,159	2,116	2,863	13,288	1,905
Technology	19,016	44,859	17,216	22,951	12,862	7,622	11,944	3,800	4,760
BI PM					306	2,854	13,631	4,291	
Other		0				1,743			

Customer Requested vs Mandatory Completed Number of Projects Per FY



Number of Projects Per FY By Area

	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	FY 16	FY 17
HR	4	9	3	6	7	5	3	2	2
Finance	11	14	12	10	11	13	7	9	1
Student	9	12	9	3	9	4	4	6	4
Technology	8	14	11	7	6	3	4	5	5
BI PM					1	1	4	2	
Other		2				1			

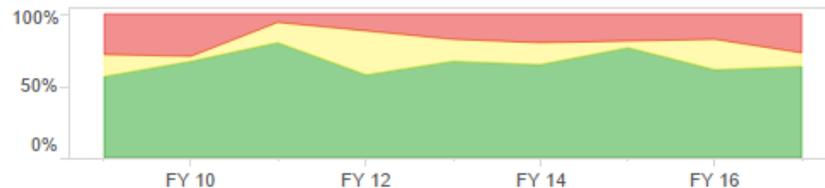
Mandatory Hours (%) Per FY



Schedule Performance

Count of Projects by Status  
 ● 157 ▲ 35 ✖ 44

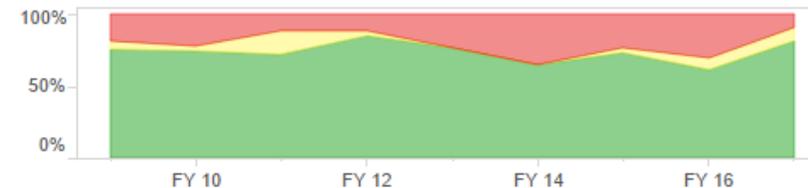
Schedule Performance By FY



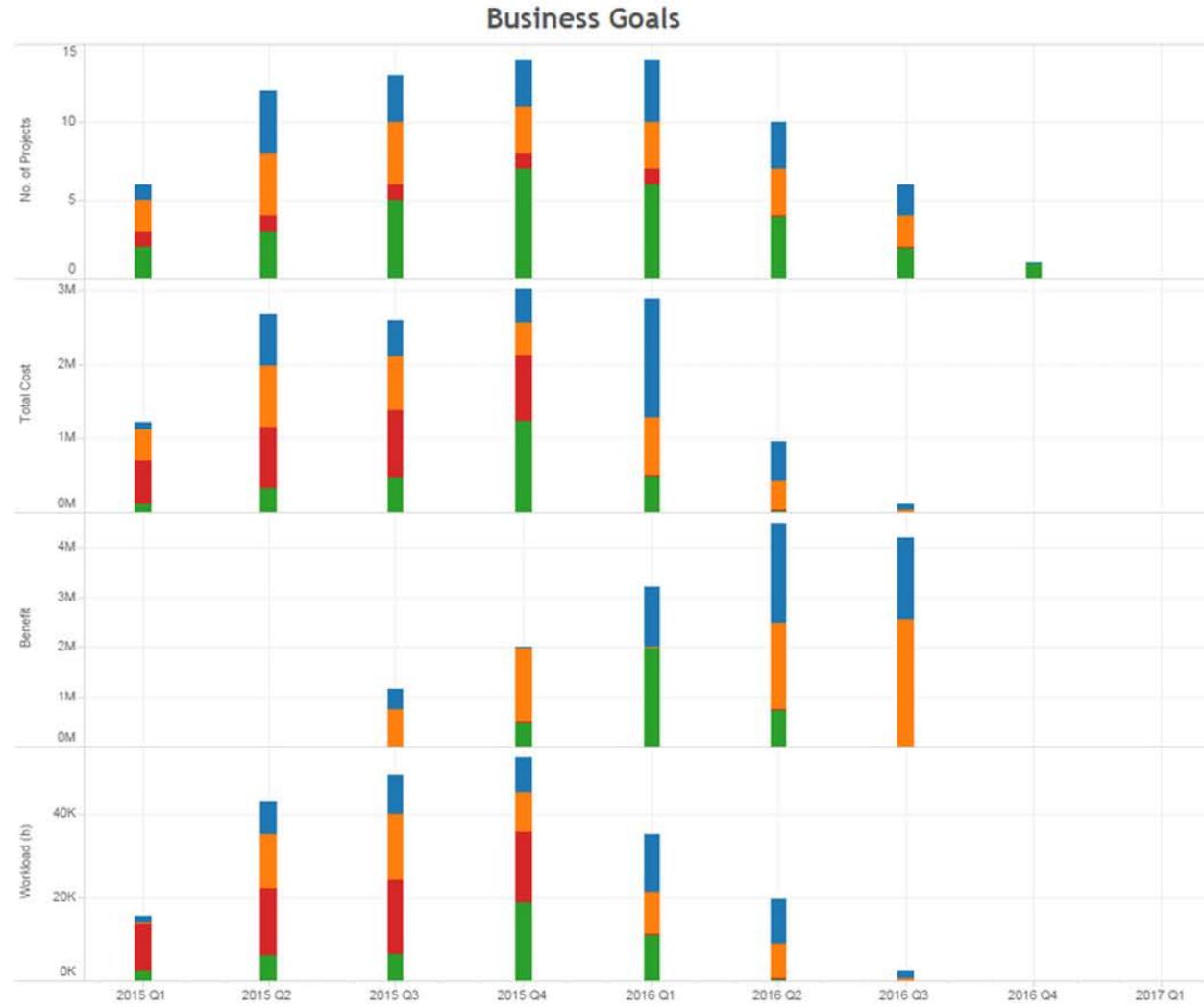
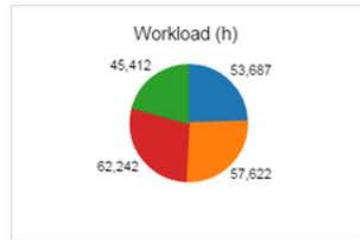
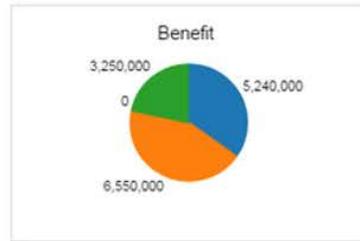
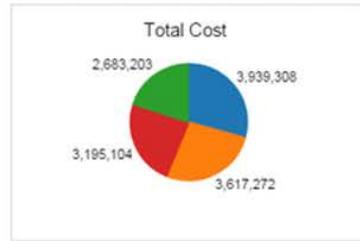
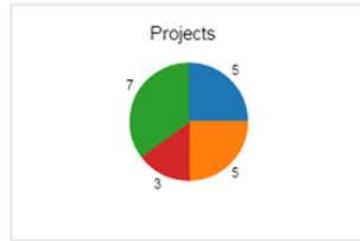
Budget Performance

Count of Projects by Status  
 ● 173 ▲ 14 ✖ 49

Budget Performance By FY



# Executive Dashboards

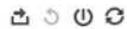


Scenario: 1 Repository

Business Goal Legend:

- Change the Business (Blue)
- Grow the Business (Orange)
- None (Red)
- Run the business (Green)

Share Remember my changes



# Samples: Rego Adoption Metrics

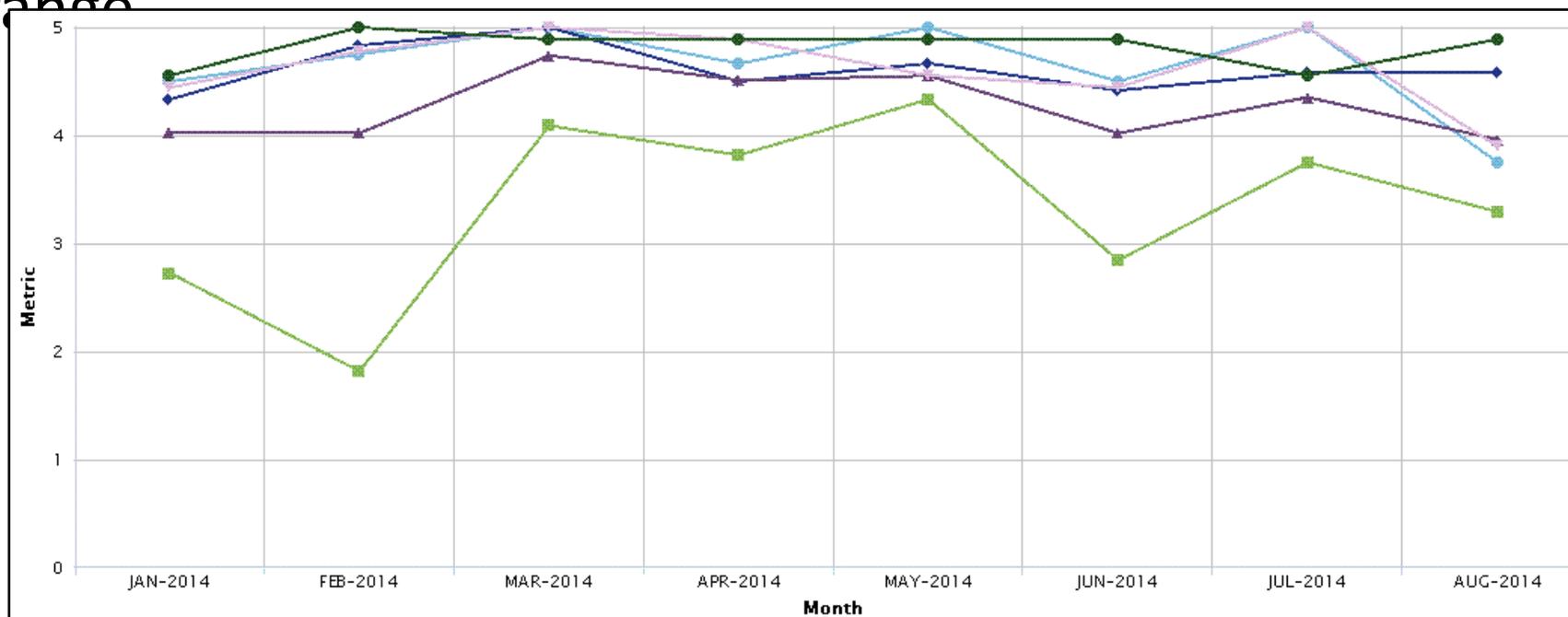
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# Adoption Metric Framework Levels

- The Adoption Metrics Framework is based on criteria built using a set of scoring levels that will drive maturity.
- Scoring Levels range from 0 to 5
  - 5 – data is of high quality, latest information available
  - 4 – repeatable consistent use with improved data
  - 3 – regular use with consistent data
  - 2 – regular use but inconsistent data
  - 1 – ad hoc or inconsistent use
  - 0 – minimal or no compliance
- To implement the adoption metrics, custom attributes are created on either the project object or the resource object and each metric holds a score that is calculated based on thresholds

# Adoption Metric Trending -Views

- This portlet pulls monthly trending snapshots for the full complement of metrics displayed in line graph form. This view can be filtered by OBS or by a date range



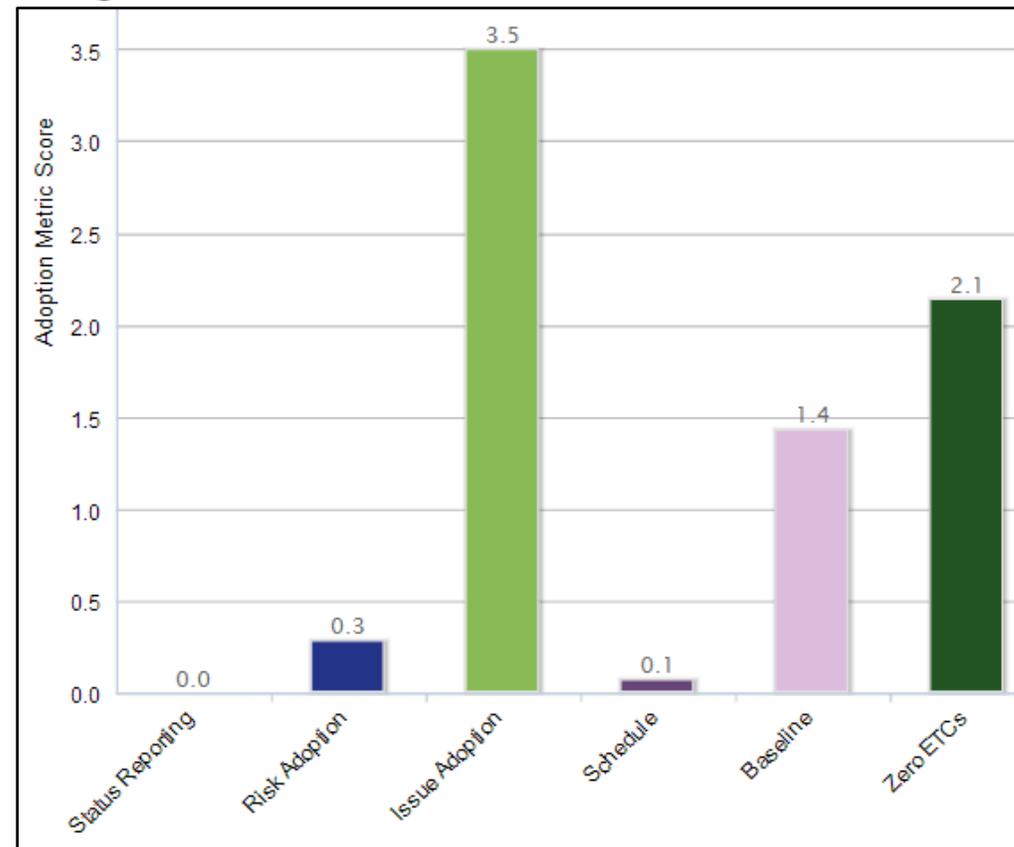
# Project Adoption Metrics

The following slides describes in more detail the individual metrics used to provide data from within the Project Object. The metrics include:

- Project Status Reporting
- Project Risk Adoption
- Project Issue Adoption
- Project Schedule
- Project Baseline
- Project Zero ETC's
- Project Past ETC's
- Project Milestone/Key Tasks
- Project Schedule Variance
- Project Effort Variance
- Project Budget Variance
- Project Unfilled Roles
- Project Data Quality
- Project Commitment

# Project Metrics - Portlet

- This portlet displays all the project metrics in a column graph view based on the level of the Organization Breakdown Structure chosen.



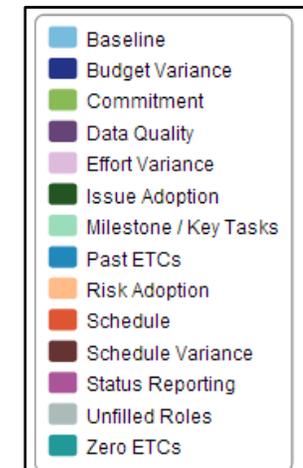
# Project Metrics Details - Portlet

- This portlet displays numeric values for all of the project adoption metrics in a row format. This view can be filtered on Organizational Breakdown Structure, Project or Manager.

Project ▲	Manager	Start Date	Finish Date	Status Reporting Metric	Risk Adoption Metric	Issue Adoption Metric
Another Sharepoint Test	Wuenstel, Chris	1/7/14	1/7/15	0	0	5
Final Sharepoint Test	Wuenstel, Chris	1/8/14	1/8/15	0	0	5
JD - Test Project	Wuenstel, Chris	5/2/13	8/31/14	0	0	5
Open Superhero Schools	West, Wally	10/29/12	11/25/14	0	1	2
Phase Exit Gate	Wuenstel, Chris	2/3/14	2/3/15	0	0	5
Project for Test Idea 1234	Administrator, Niku	5/1/14	5/24/15	0	0	5
Save the World	Ortega, Juan	1/1/12	9/28/17	0	1	2
Sharepoint Project Test	Wuenstel, Chris	1/6/14	1/6/14	0	0	5
Sharepoint Project 2	Wuenstel, Chris	1/9/14	1/9/15	0	0	5
Sharepoint 2013 New Test	Wuenstel, Chris	2/24/14	2/24/15	0	0	5

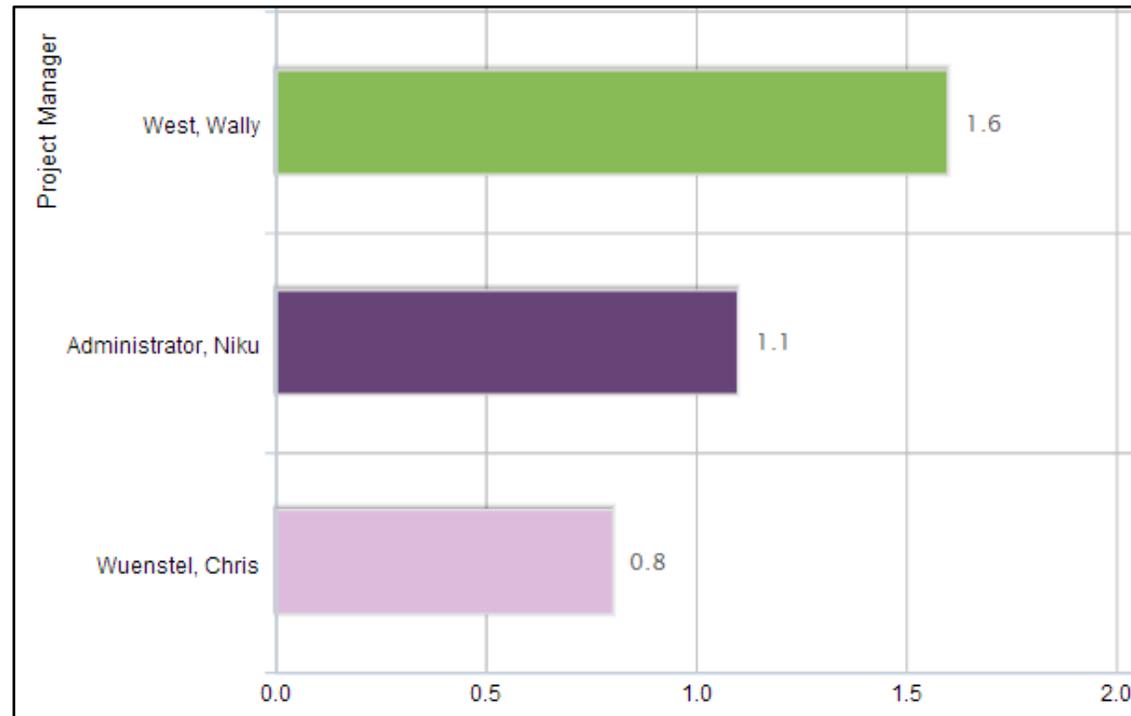
# Project Metrics by OBS

- This portlet displays all the metrics or a specific metrics in row graphical format based on filtering by the Organizational Breakdown Structure level and/or to a specific metric.



# Project Lowest/Highest Adopters

- This portlet provides a view into which resource managers have the highest or lowest adoption scores by looking at an average overall score for all Resource metrics or by an individual metric.



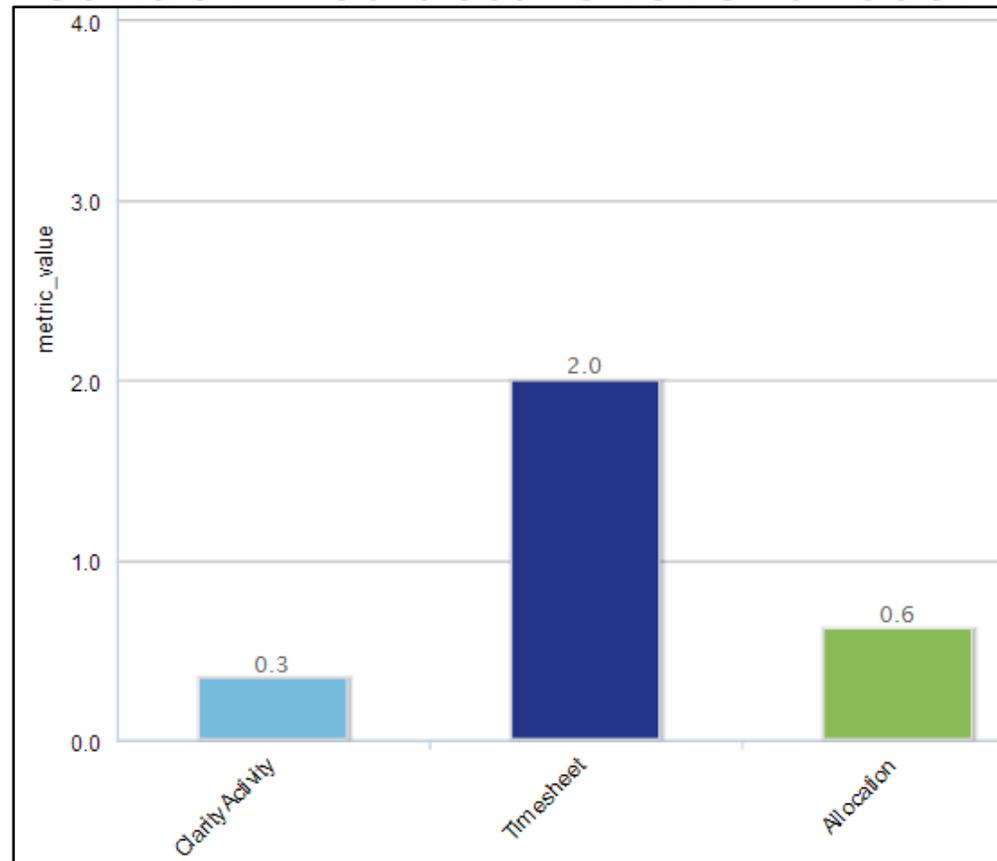
# Resource Adoption Metrics

The following slides describes in more detail the individual metrics used to provide data from within the Resource Object. The metrics include:

- Resource CA PPM Usage
- Resource Timesheet
- Resource Allocation
- Resource Actual Utilization
- Resource Allocation Date in the Past
- Resource Data Quality
- Resource Commitment

# Resource Metrics - Portlet

- This portlet displays all the resource metrics in a column graph based on the Organization Breakdown structure level chosen.



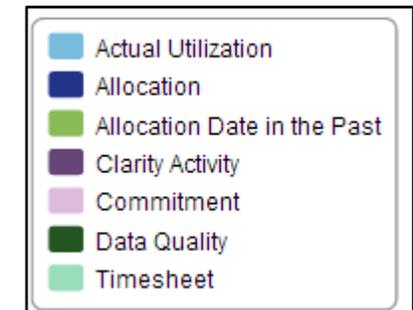
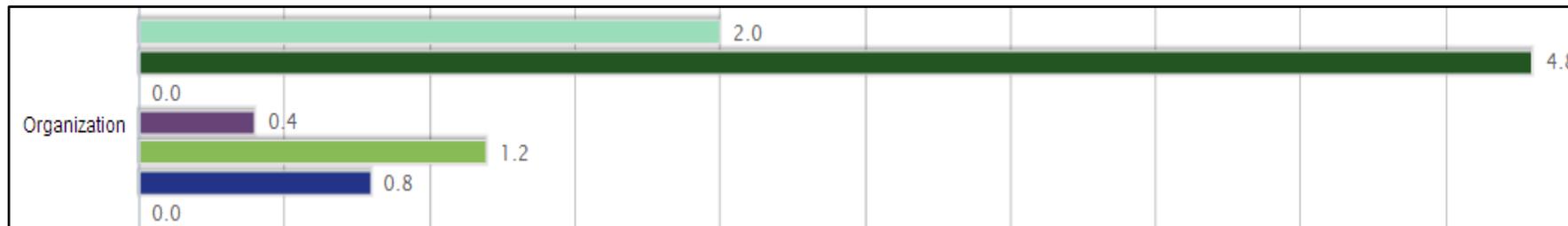
# Resource Metrics Details - Portlet

- This portlet displays numeric values for all of the resource adoption metrics in a row format. This view can be filtered on Organizational Breakdown Structure, Project or Manager.

Resource ▲	Manager	Clarity Activity Metric	Timesheet Metric	Allocation Metric	Actual Utilization Metric
Wachsmann, David	Administrator, Niku	0		0	
warner, mark	Administrator, Niku				
West, Wally	Allen, Barry	0	2	3	0
Woman, Cat	Spiderman, Spidy	0	2	0	0
Woman, Wonder	Kent, Clark	0	2	5	0

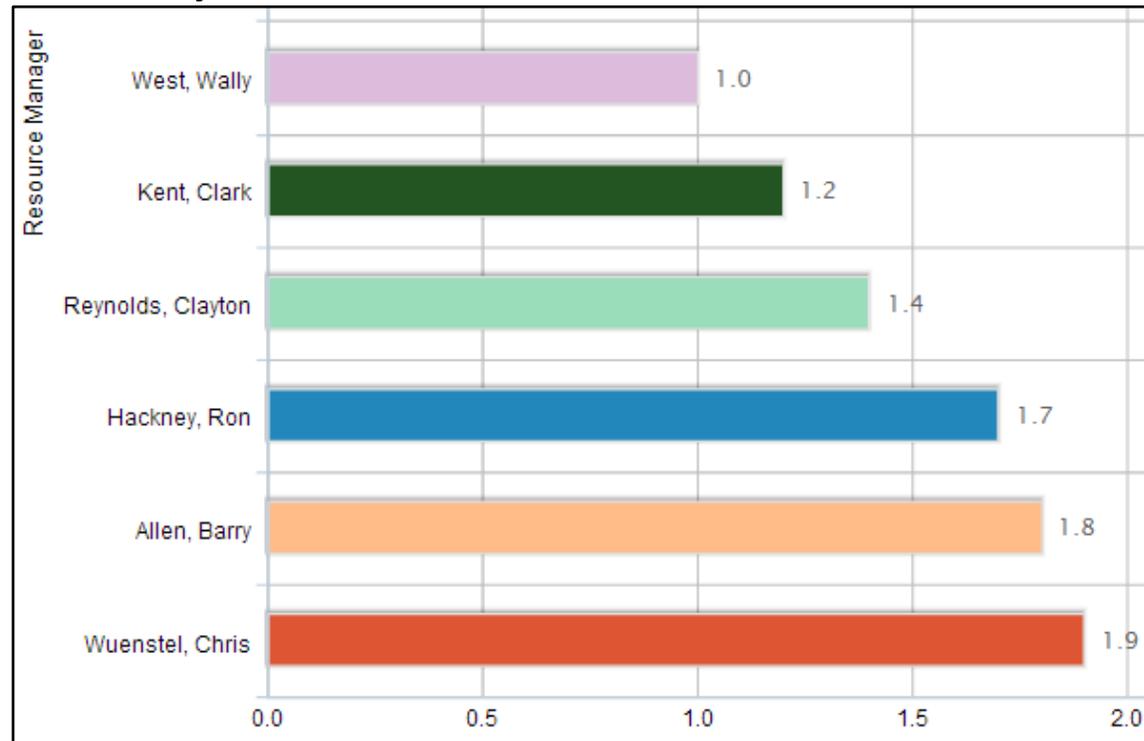
# Resource Metrics by OBS

- This portlet displays all or a specific resource metrics in row graphical format filtered on Organizational Breakdown Structure and specific metric.



# Resource Lowest/Highest Adopters

- This portlet provides a view into which resource managers have the highest or lowest adoption scores by looking at an average overall score for all Resource metrics or by an individual metric.



# Summary on Metrics

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# Final Thoughts – Metrics.....

- drive behavior
- need to be intuitive
- are validated when aligned with company goals
- provide a means for management to see where help is needed
- can have a finite lifespan
- come and go as business changes
- thrive in simplicity
- are easy to collect and report on
- need a champion
- must be clearly communicated and be kept visible
- are not a way to get people in trouble
- should be removed if they are not effective

Questions?



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Let Rego be your guide.

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- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



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# Appendix: ServiceNow Dashboards

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# Project Management

## Project Manager Dashboard

Open Risk

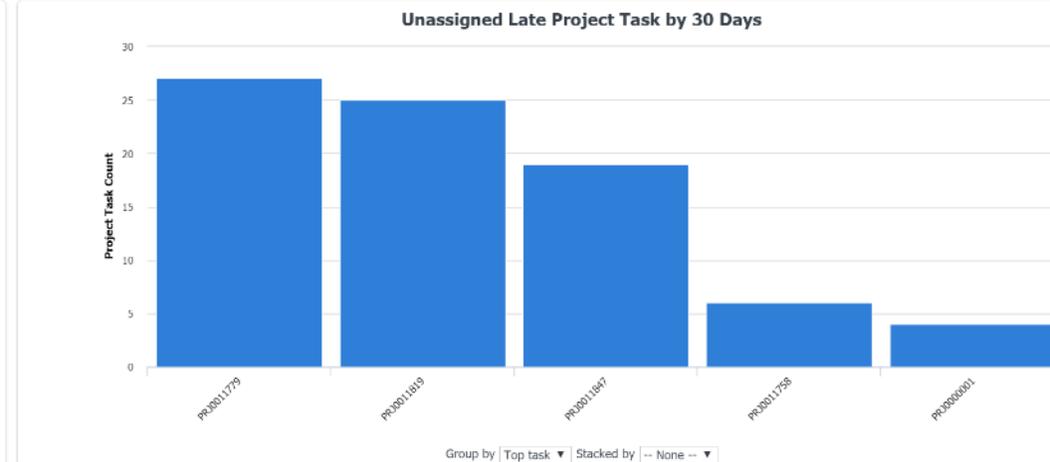
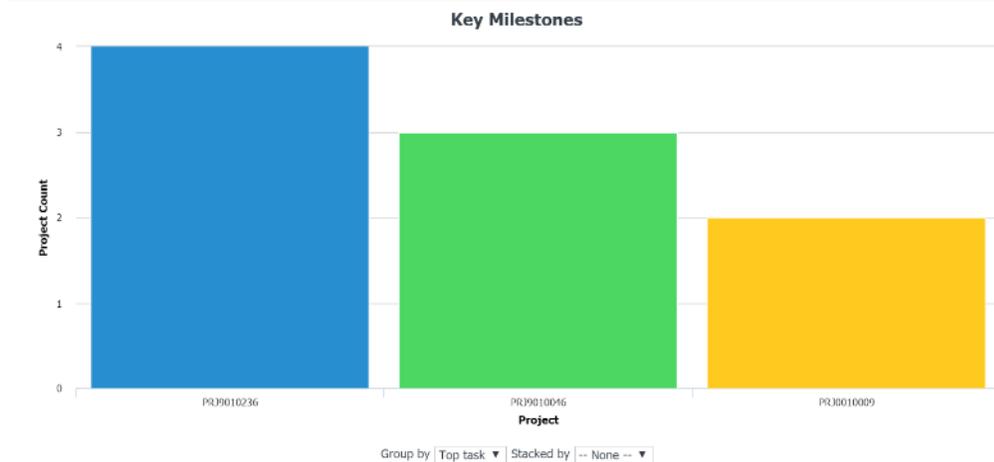
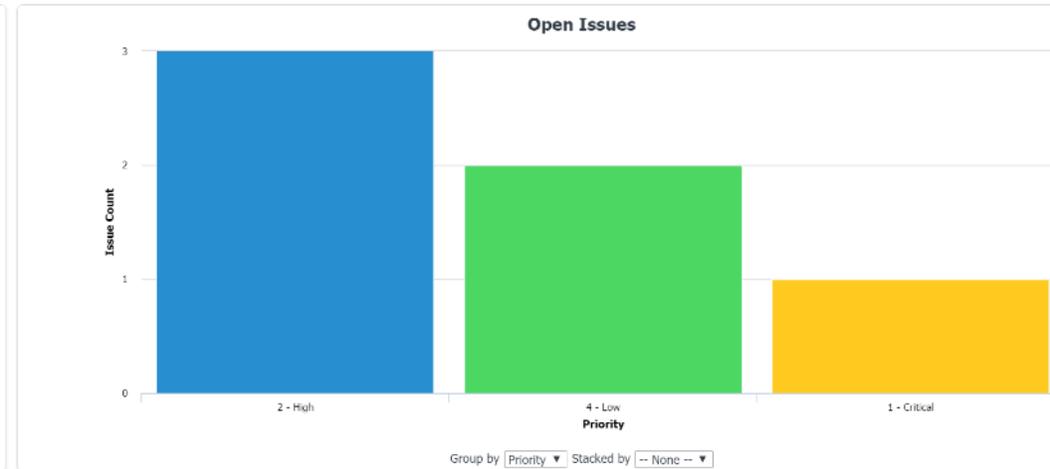
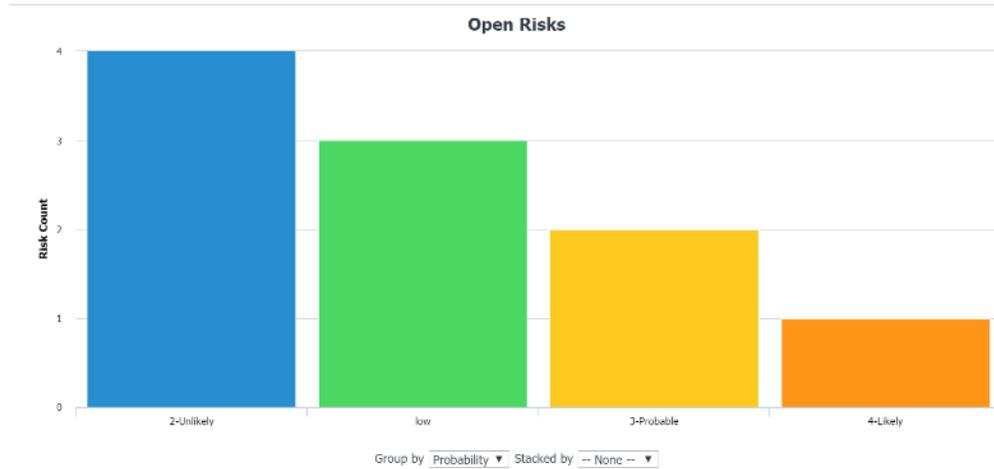
10

Open Issues

6

Key Milestones

9



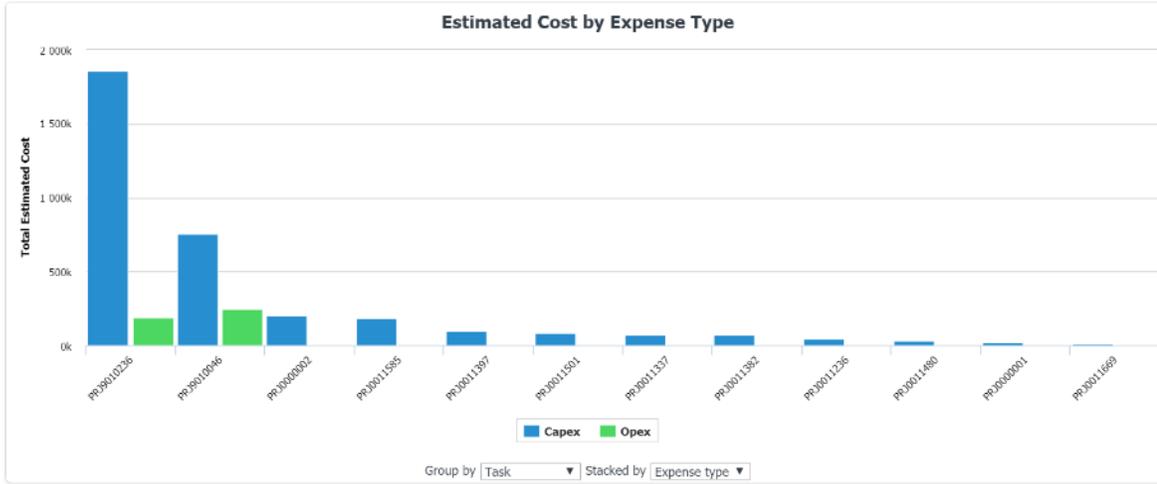
# Program Management

Active Projects

21

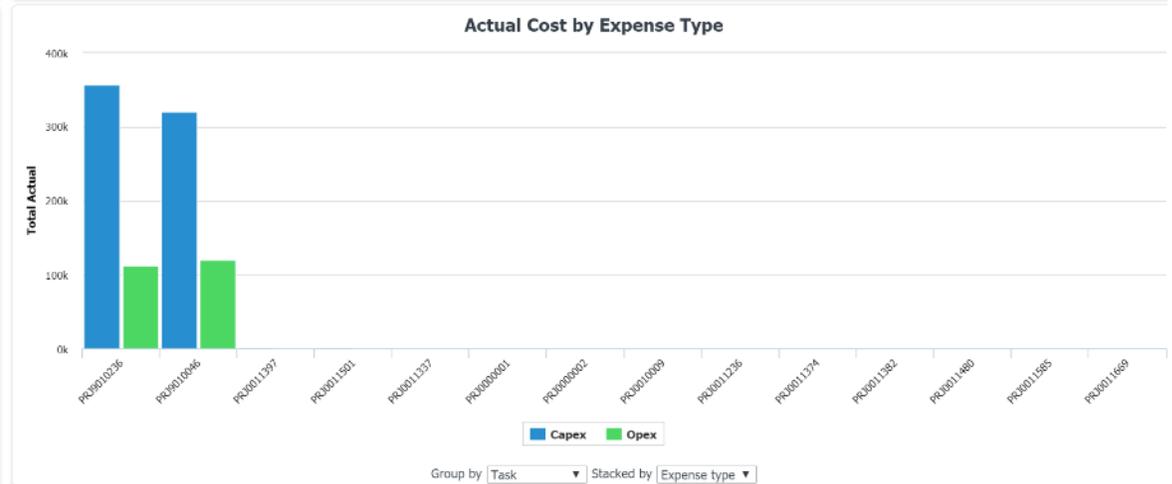
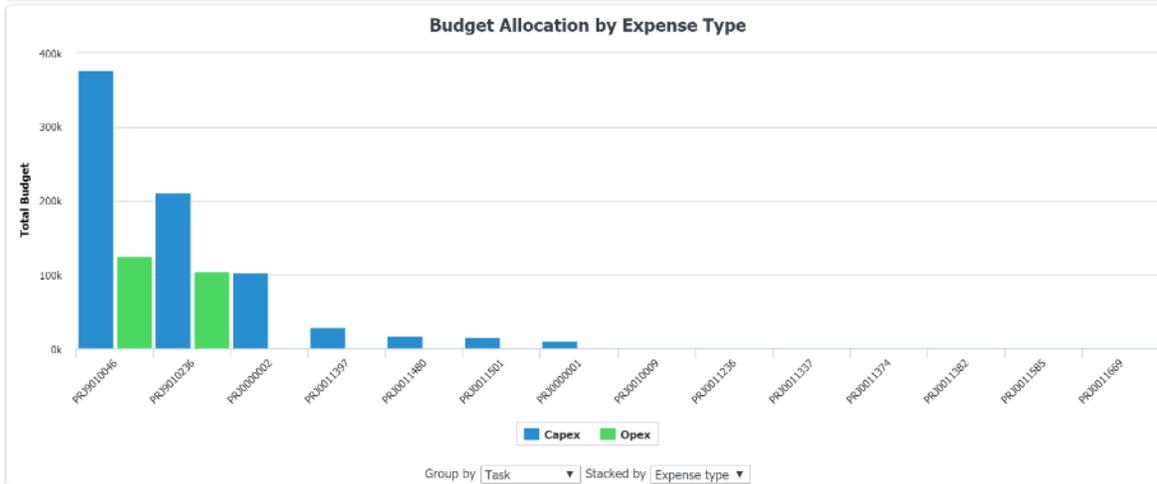
Programs

0



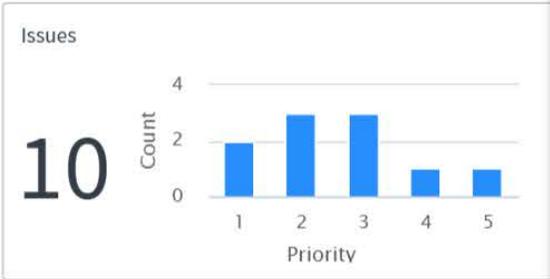
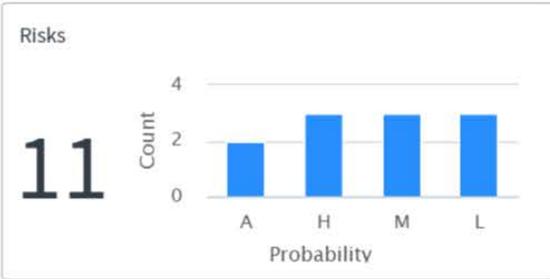
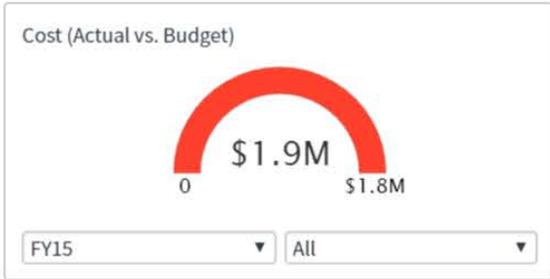
### Estimated Cost by Cost Type

Project ID	External labor Capex	Hardware Capex	Hardware Opex	Labor Capex	Labor Opex	Software Capex	Software Opex
PRJ0000001				3,000		8,000	
PRJ0000002				102,600			
PRJ0110009	2,000						
PRJ011236	15,000			7,850			
PRJ011337	20,000			16,800			
PRJ011382	20,000			16,800			
PRJ011397	20,000			28,200			
PRJ011480				17,400			
PRJ011501	20,000			22,125			
PRJ011585	20,000			69,600			
PRJ011669				6,000			
PRJ010046			125,000	377,000			
PRJ010236	75,000			850,800	65,800		30,000



# Portfolio Management

Green IT Initiative Portfolio Workbench Financial Planning  FY15 ⌵ Edit portfolio ?



Name	Planned	Budget	Priority	Manager	ROI %	% Complete	Year - 2015												Year - 2016
							Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
ServiceWatch implementation	\$464.1K	\$464.1K	1 - Critical	Hillary Holmes	155.16	100%		●	●	●	●	●	●	●	●	●	●		
Create Information Portal	\$235.2K	\$235.2K	2 - High	Diana Temple	163.77	100%			●	●	●	●	●	●	●	●	●		
Implement Survey system	\$208.7K	\$208.7K	1 - Critical	Danny Dales	203.64	100%			●	●	●	●	●	●	●	●	●		
Rack Server Replacement with Energy efficient s	\$264.1K	\$264.1K	2 - High	Essie Vaill	119.3	100%							●	●	●	●	●		
Cisco Jabber for Laptops	\$739.6K	\$730.6K	2 - High	Angelique Schern	232.49	100%									●	●	●		

# Financial Management

Active Projects

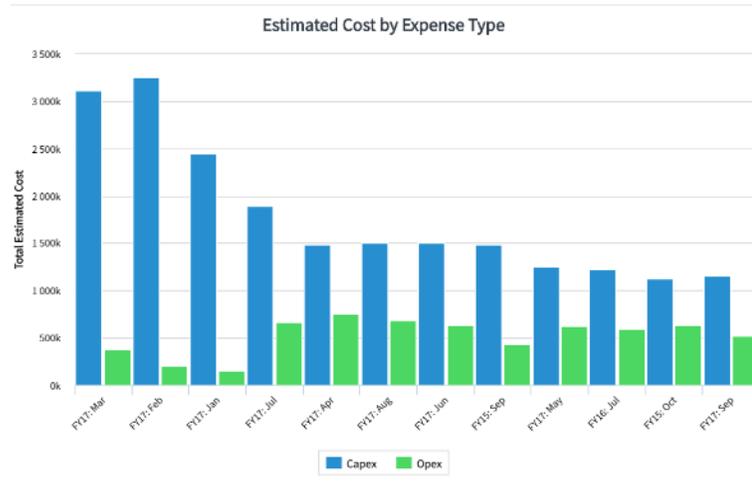
108

Number of Project Managers

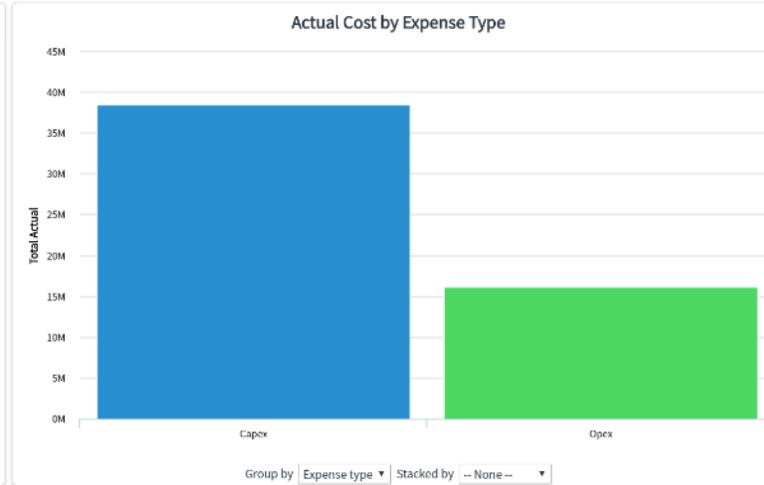
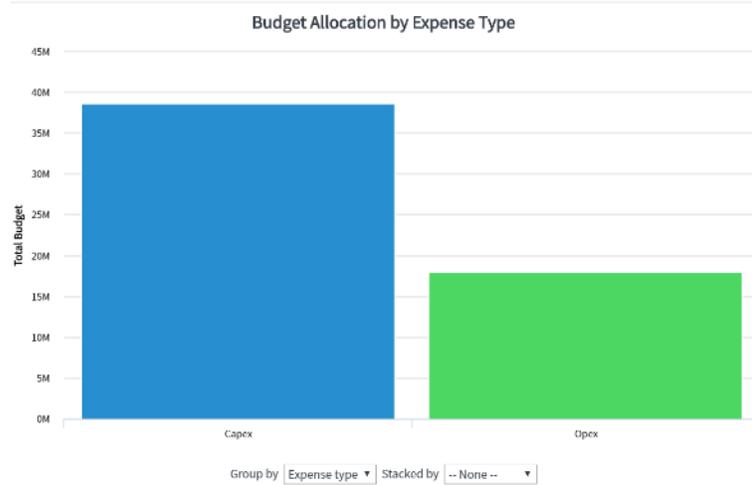
26

Active Programs

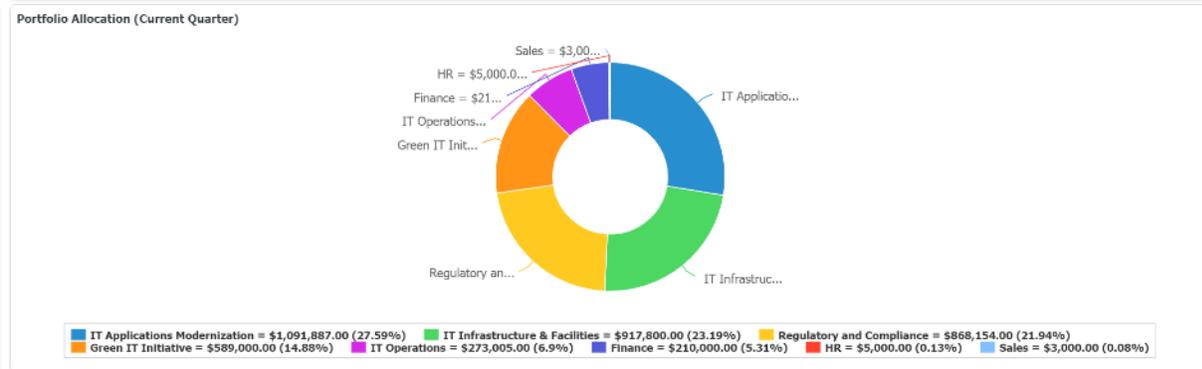
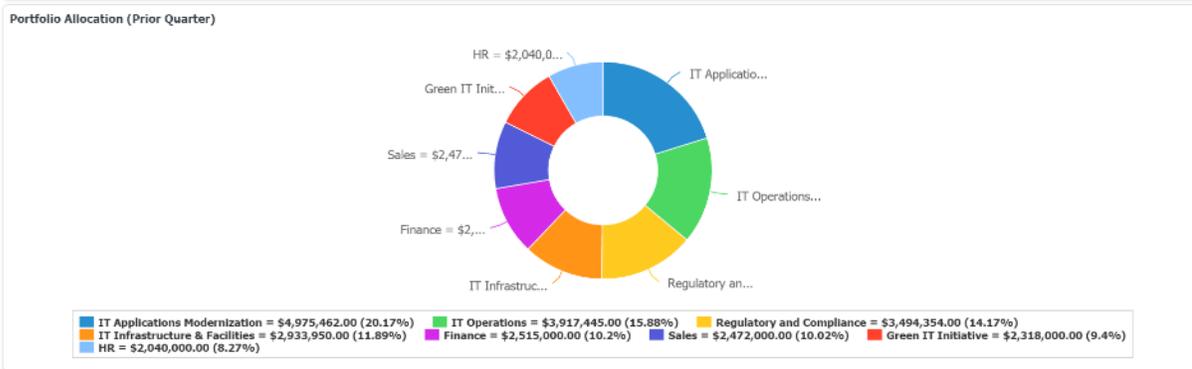
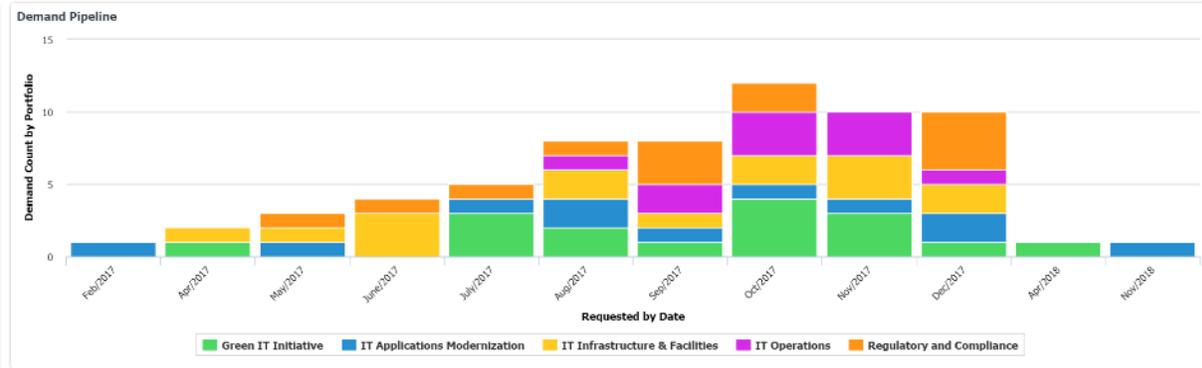
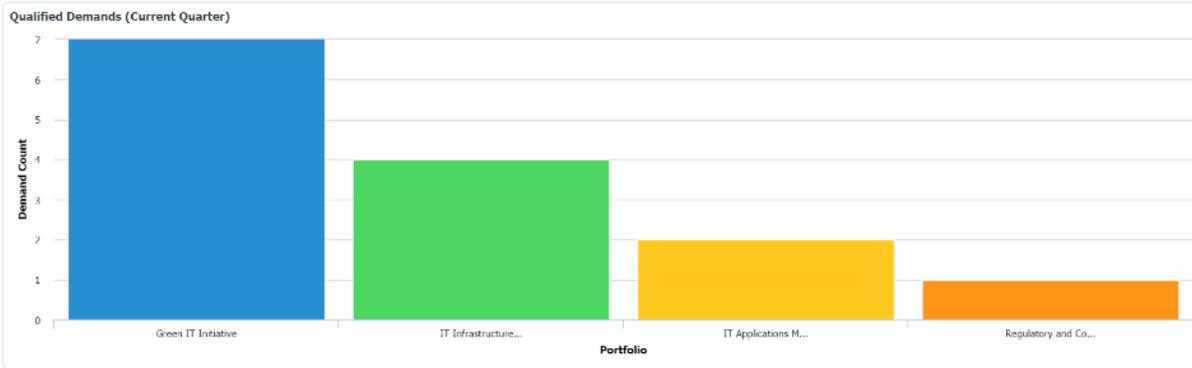
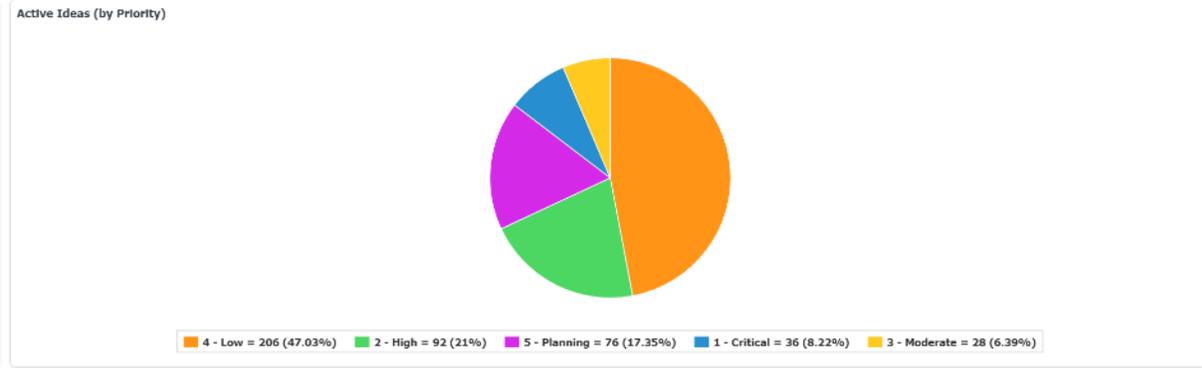
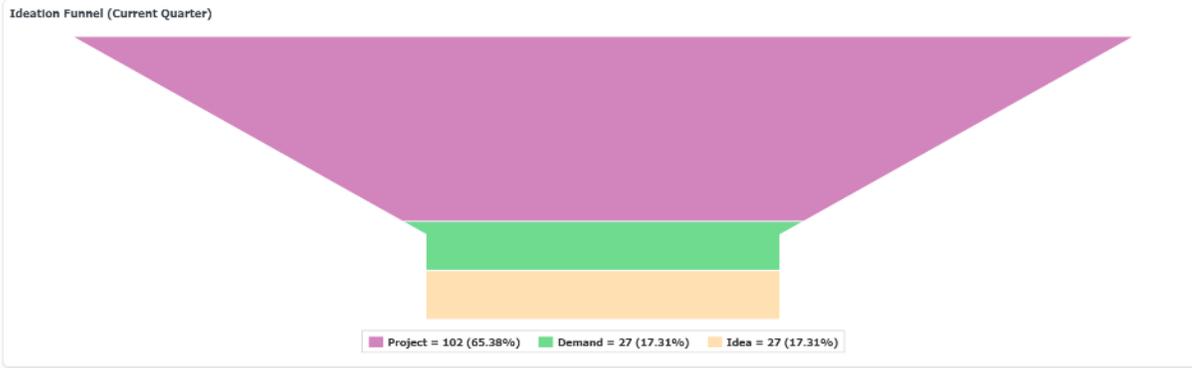
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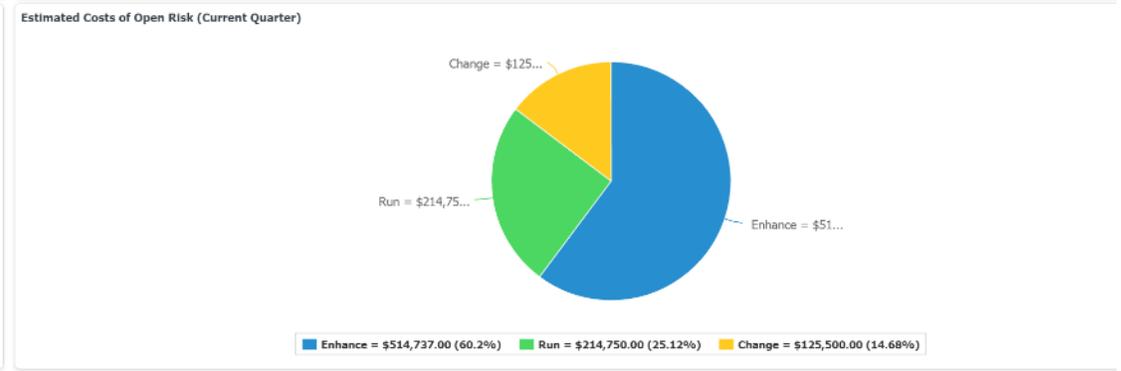
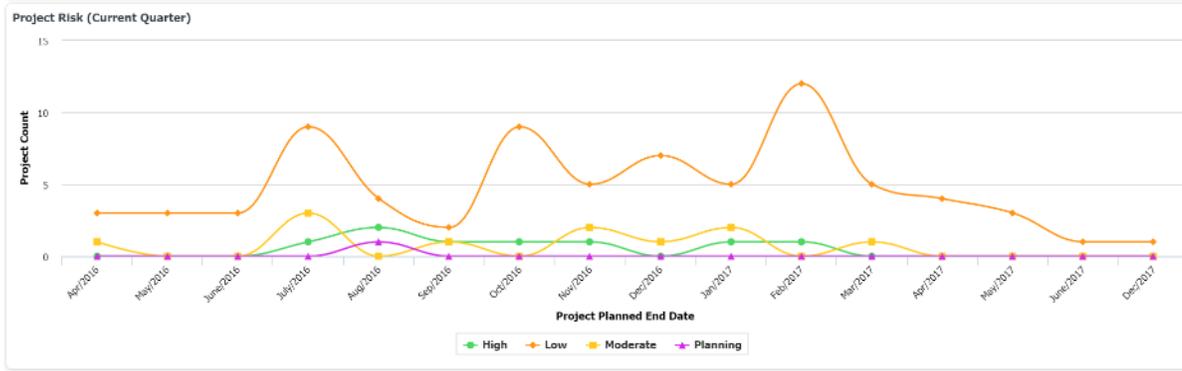
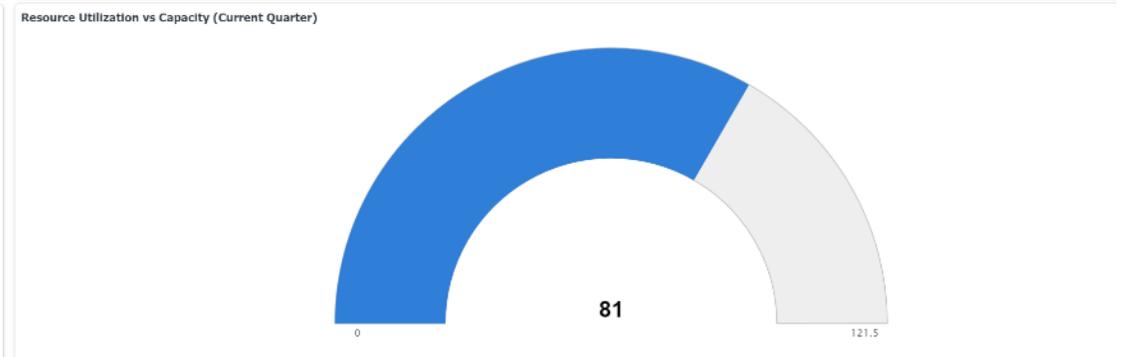
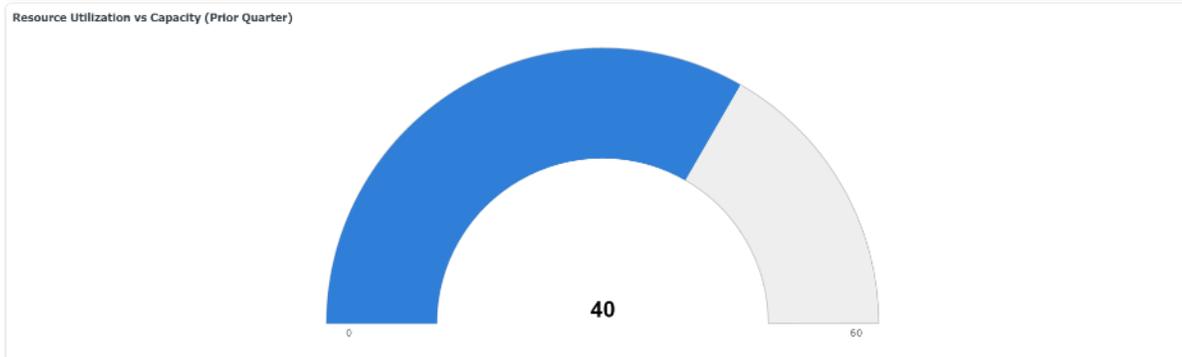
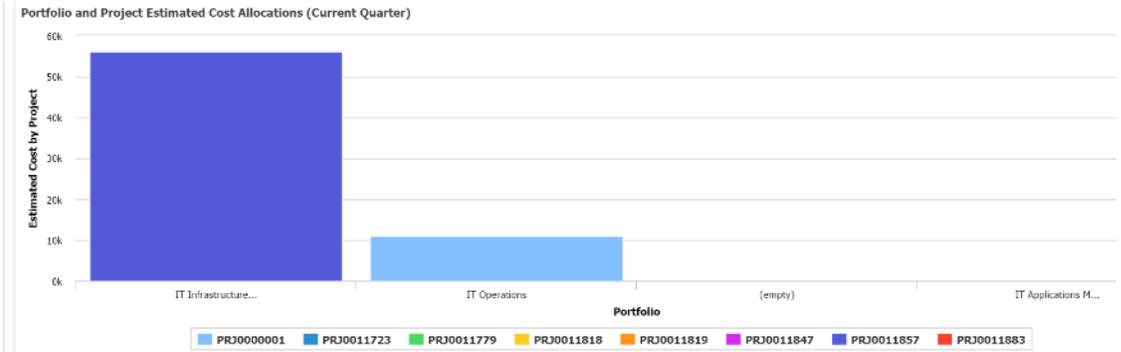
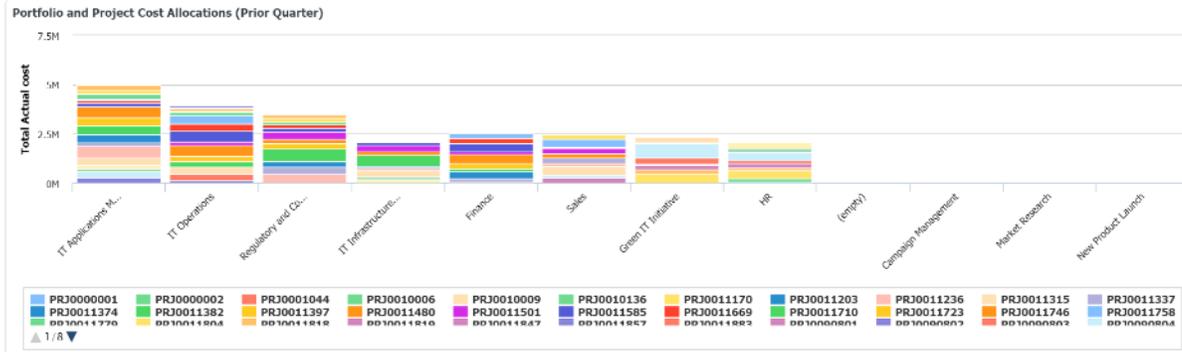
Category	External labour Capex	External labour Opex	Hardware Capex	Hardware Opex	Labor Capex	Labor Opex	Other Capex	Other Opex	Software Capex	Software Opex
(empty)			12,000		5,000					
Green IT Initiative			144,000	2,248,200	125,000	5,791,000	1,248,800		362,020	440,000
IT Applications M...	75,000	363,875	1,331,286	345,141	4,617,050	1,543,800	100,000	139,375	191,960	145,000
IT Infrastructure...	70,000	510,375	7,261,750	360,325	3,825,000	1,159,100		63,000	309,500	500,875
IT Operations		553,450	355,030	183,500	4,640,600	493,650		156,700	17,500	697,495
Regulatory and Co...		364,375	578,484	185,057	6,300,150	1,806,800		768,000	342,150	790,446



# Executive Dashboards



# Executive Dashboards



# Executive Dashboards

Open Risk

373

Open Issues

127

Active Projects

35

