



regoUniversity 2019

SAN DIEGO

Dashboards/Metrics | Best Practices

Your Guides: Atul Kunkulol & Karen Lifsey

Introductions

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



Agenda

- Metrics Overview
- Samples
 - Rego PowerBI Metric Dashboards
 - Rego RegoXchange
 - Custom Dashboards
- APPENDIX: OOTB Dashboards

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 a Metric?

- 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

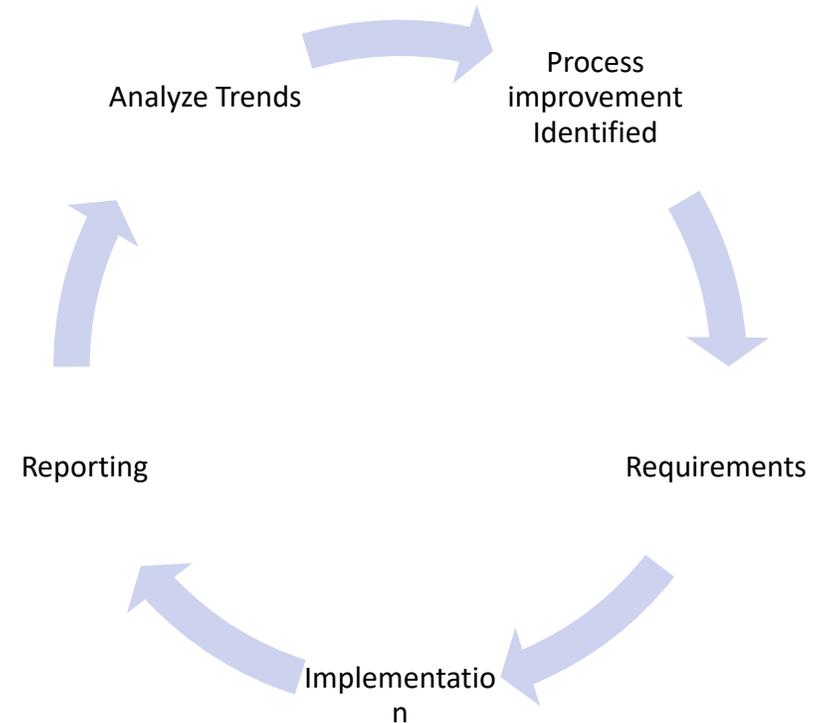
• Metric Formats

- 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



Key Metrics by Functional Area

- **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?
- Give examples of Metrics/KPIs you have?

Overview of Dashboards

- Many companies have executives that find it too complicated to navigate in CA PPM with too many places they have to look to understand data as a whole
 - Usually middle management summarizes data for upper management in PowerPoint
- Dashboards provide an easy-to-read interface that presents key information so users can understand how investments are performing, including
 - Schedule Status
 - Cost
 - Key Performance Metrics



Overview Of Dashboards, cont.



- A well executed dashboard can provide a brief snapshot of the entire business in an easy-to-read, at a glance view
- Good dashboards are comprehensive, the metrics displayed are easy to understand, and they help users focus on the right things
- The sole purpose of a dashboard is to summarize performance

Benefits of Dashboards



- BUY-IN
 - Dashboards provide a convenient way for management to start looking at CA PPM data first hand
 - Once the rest of the organization realizes executives are using dashboards, they start maintaining the CA PPM Data (instead of managing in their own spreadsheets)
 - This automatically creates better quality data
 - Over time, CA PPM becomes the “one source of truth”

Benefits of Dashboards

- Consistency in KPI reporting
 - Some large organizations have multiple PMO's that result in multiple different processes
 - KPI's are a result of the process developed by each PMO and could mean different things to different people
 - Dashboards bring consistency in reporting KPI's, encouraging consistent processes



Dashboard Levels

- Not all Dashboards are for all audiences
- When creating dashboards it is critical to understand the consumers of the information being reported
- Common audiences that will be viewing dashboards include
 - CEO/board level
 - Corporate vice president/director level
 - IT/Bus strategic level, similar to above, but focused on IT or Bus
 - IT/Bus operational dashboards



5 P's of Effective Dashboard Delivery

- Purpose

- Clear objective
- Should deliver actionable insight
- Information relevant to the purpose and audience – less is more
- Draw attention to relevant trends, pain points, comparisons
- Balance the content – good and bad news; bad news only may be demotivating



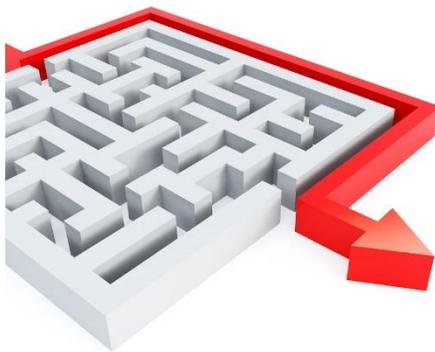
- Process

- Agile methodology (2 week sprints)
- Prototype to demonstrate the “Art of the Possible”
- Align requirements with the available technology
- User involvement

5 P's of Effective Dashboard Delivery, cont.

- Participants

- Target select groups as audience, not the whole organization
- Data is not “nice to have” if it doesn’t help the user arrive at actionable insight
- Predefined conclusions relieves users from performing their own analysis



- Pull

- User friendly, engaging, and easy to use interface will make the user want to consult the dashboard frequently
- Encourage interaction, drill down capability
- A good dashboard needs little or no training

5 P's of Effective Dashboard Delivery, cont.

- Principles

- Trust and integrity – data should be secure and validated against the source system
- Test the functionality of the dashboard; should be error free.
- 5 minute principle – Within 5 minutes, users should be able to review the dashboard, understand the metrics and trends, and be on their way...



Ideal Dashboard

- Functionally
 - Tells a Story
 - Helps with decision making
 - Highlights pain points / achievements
 - Right amount of details
- Technically
 - Updates in a few secs
 - Allows drill down capability
 - Allows email/print capability
 - Connects with multiple datasources
 - Variety of DataVisualizations

Tools for Dashboards

- Clarity portlet pages
- Jaspersoft Studio Reports
- Jaspersoft Dashboards
- Power BI
- Tableau
- Qlik View
- Excel / PowerPoint

Common Target Users

- CIO
- Senior Management (VPs/Directors)
- Middle Management (Project /Resource /Portfolio /Operational Managers)
- Internal Customers (Department/Branch Heads)
- External Customers (Public/Departments/Branches)

Open Mic

- Show of hands: what tools do you use for Dashboards/Metrics?
 - Portlets?
 - Jaspersoft?
 - Tableau?
 - PowerBI?
- Examples of some of the dashboards which your users often use?

PowerBI Metric Dashboards

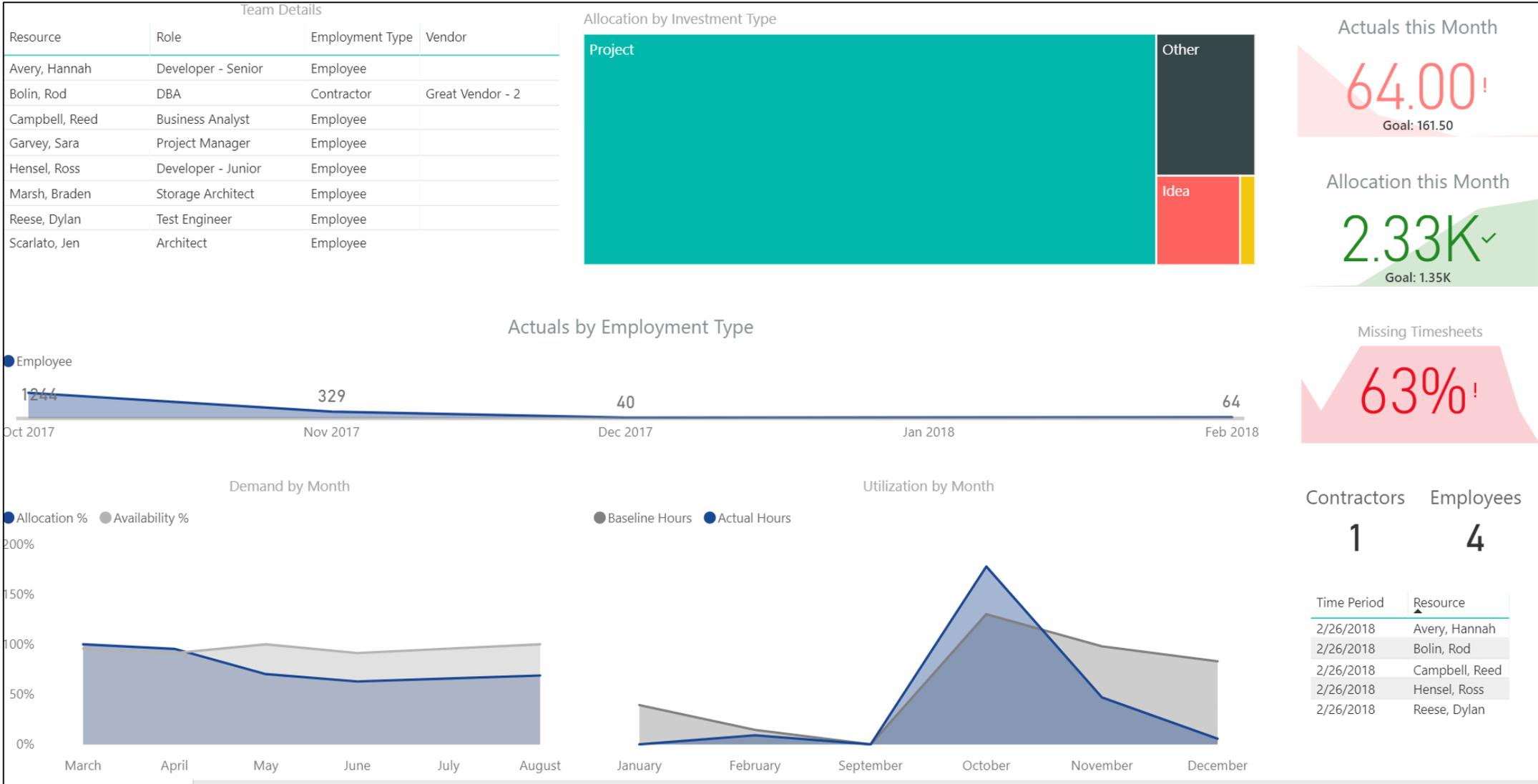


Let Rego be your guide.

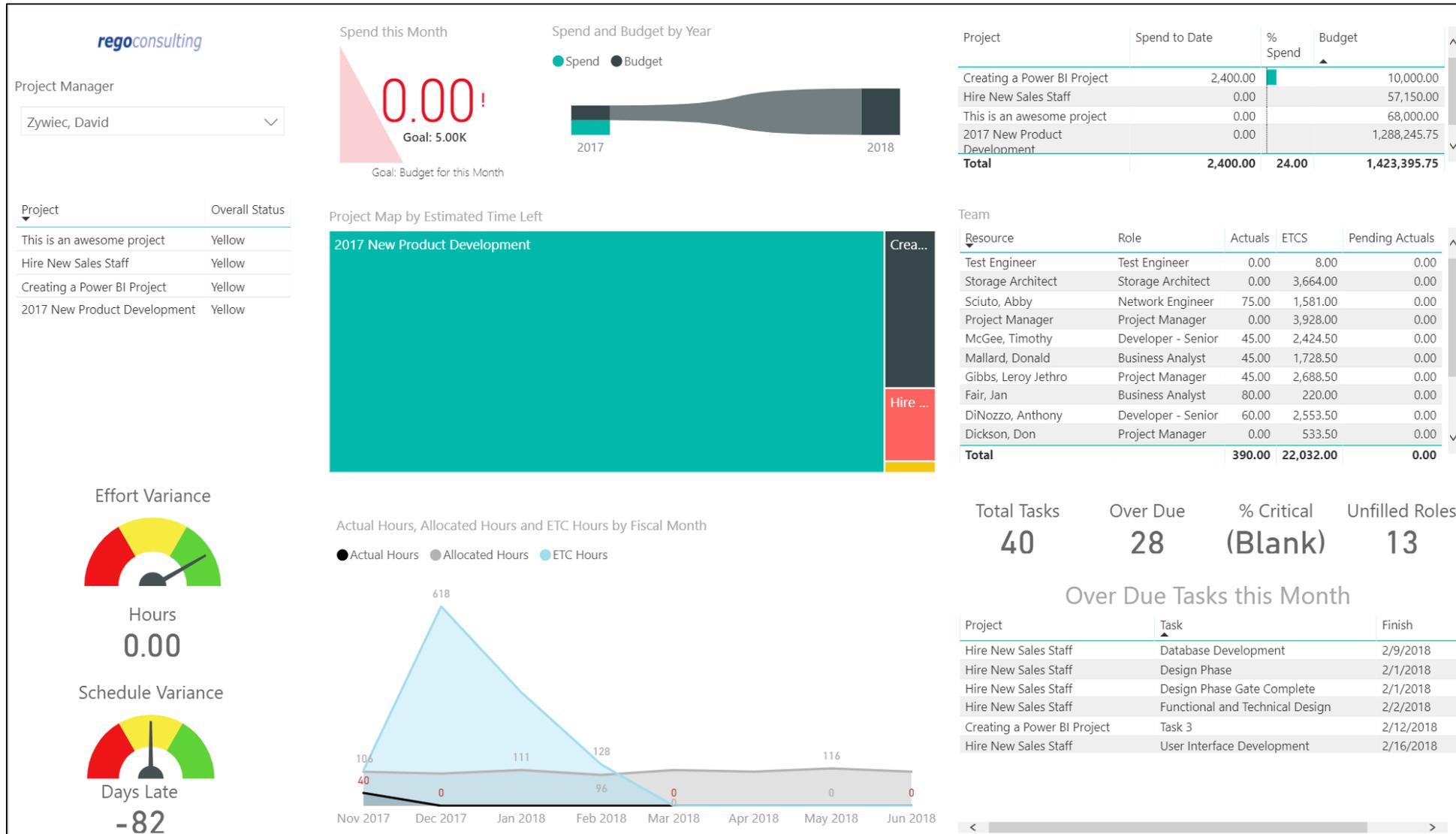
Broadcom Provided PowerBI Dashboards

- Broadcom has not produced any dashboards that can be used by customers either OOTB or through content packs
- Broadcom has provided the ability to connect powerBI to the DWH for the purpose of creating dashboards
- Rego has produced a few PowerBI dashboards that are fully supported OnDemand or onPremise. They are part of the RegoXchange

PowerBI – Resource Mgr Dash



PowerBI – Project Mgr Dash



RegoXchange



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Let Rego be your guide.

Rego Xchange – Executive Dash

Executive Dashboard: Executive Dashboard

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

Projects by Primary Division

Projects by Indicator

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

Projects by Primary Region

Project by Goal

Projects by Strategic Objective

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

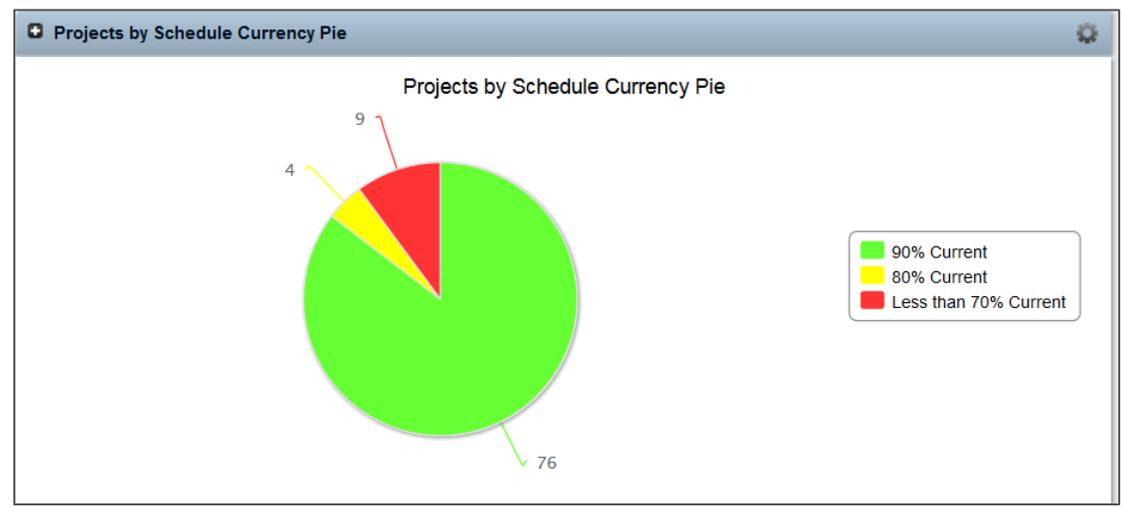
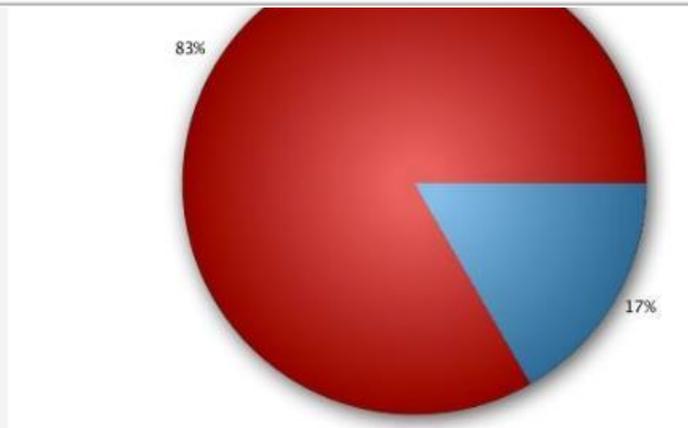
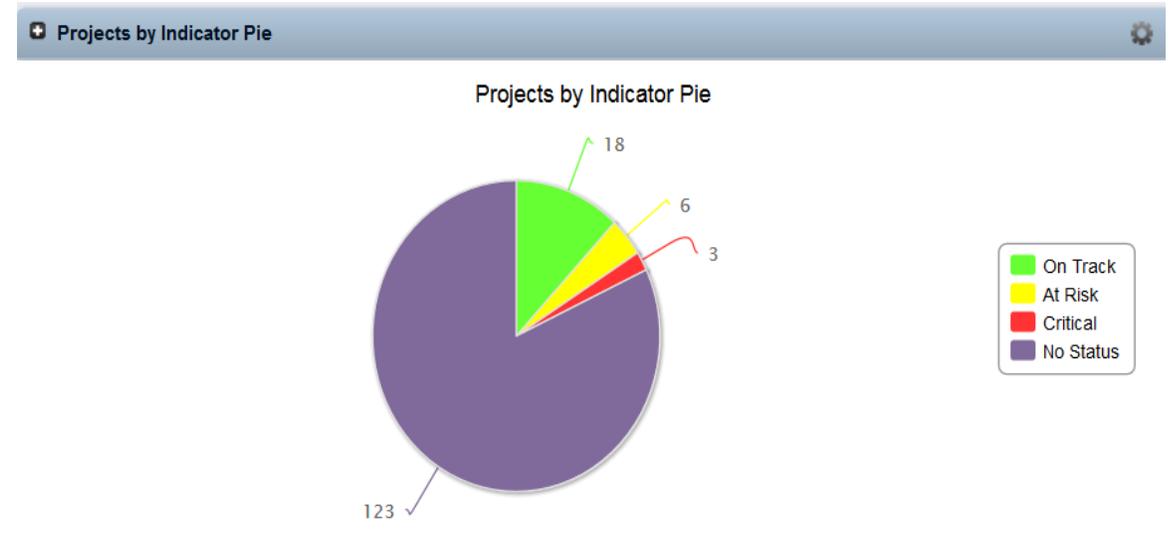
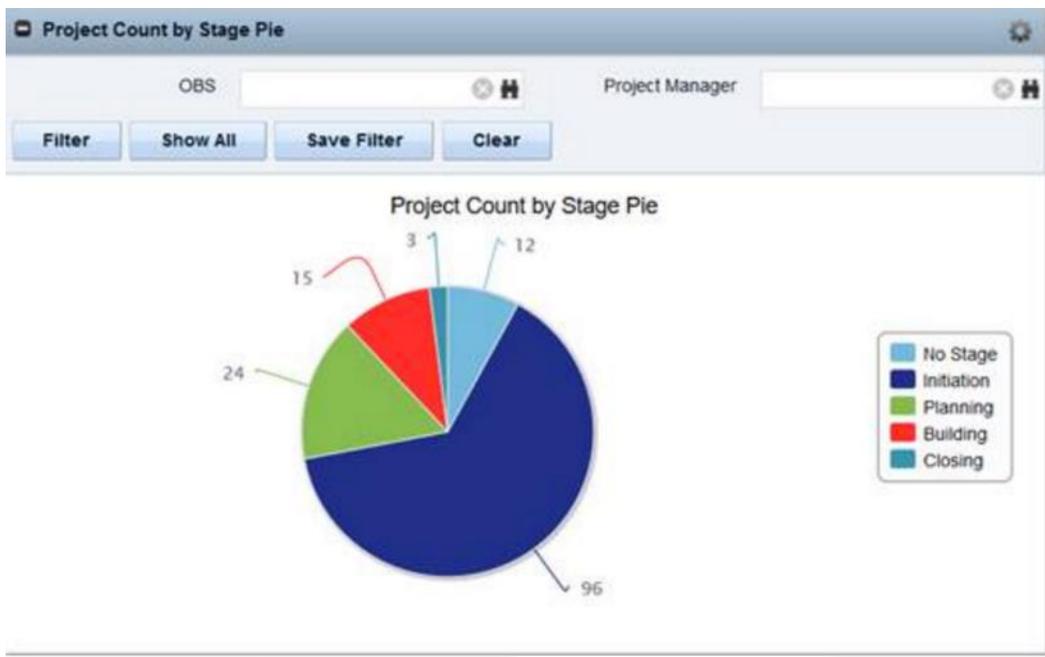
Executive Dashboard

Project OBS: Department:Development Project Manager ID:

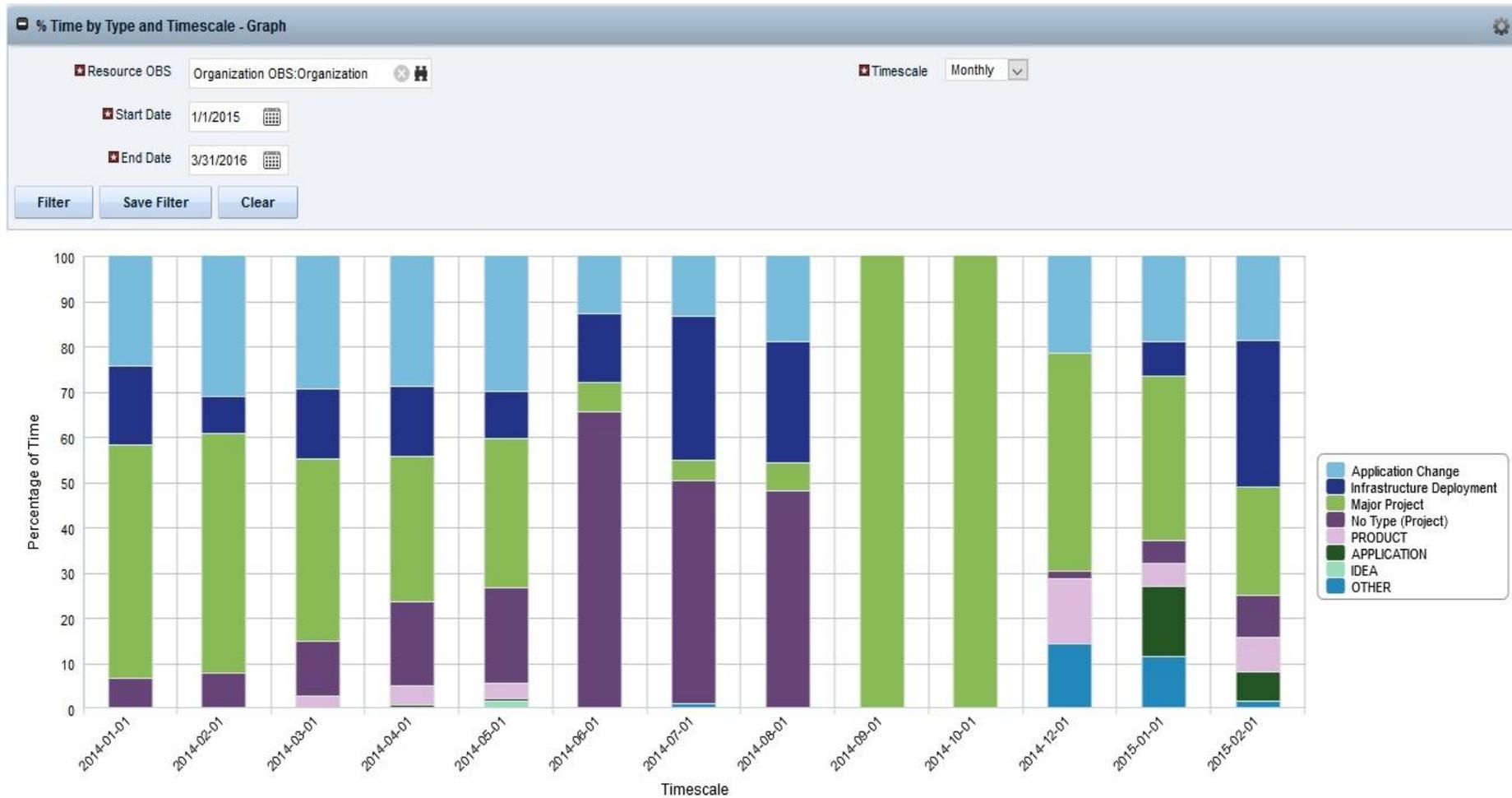
Name	ID	Overall Status	Schedule Status	Scope Status	Cost/Eft Status	Late AI	Late Issues	Late Risks	Late Tasks	Late Milestones	Sched Var	Effort Var	Hrs Past Base	Days Over Base
Computer System Analysis	PRJ9019	❌	✅	⚠️	❌	❌ 2	❌ 2	❌ 2	❌ 5	❌ 1	✅ 0	✅ 0	✅ 0	✅ 0
Consumer Reviews	PRJ909	⚪	⚪	⚪	⚪	✅ 0	❌ 2	❌ 2	❌ 3	✅ 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 – Enterprise Health



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

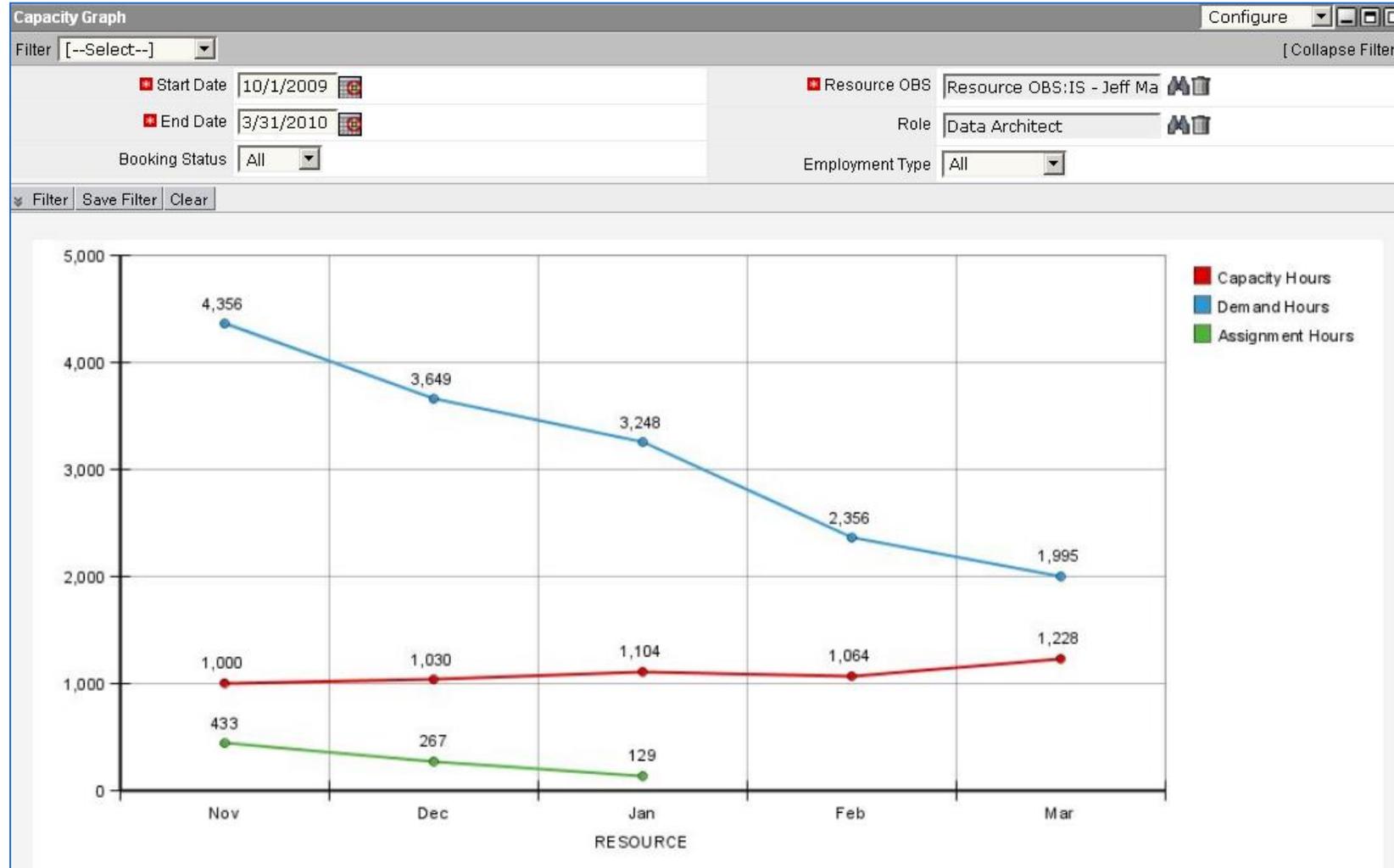
OBS Utilization Percentage

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

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



Custom Dashboards

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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

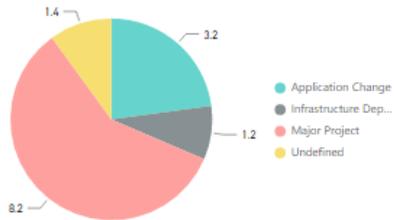
Filter:

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
- Late Tasks
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

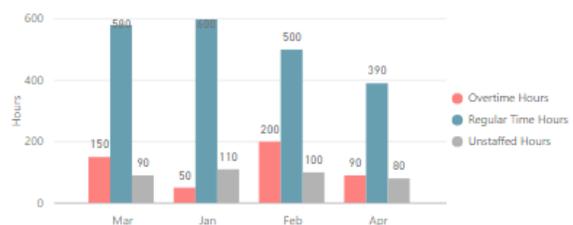
Allocation by Project Type



My Resource Count by Project

Project Name	Project Manager	Project ...	Project S...	Project FI...	Tea...	Mana...	% Ma...
Clean Waterhouse	Dhar, Sankhadeep	Approved	8/21/2015	11/20/2018	5	1	20
Computer Syste...	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

Capacity Graph



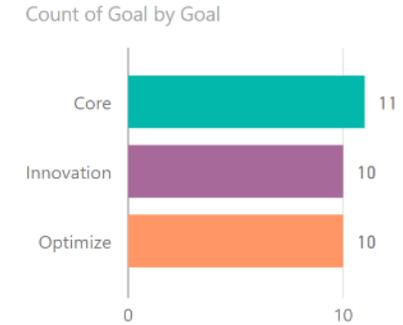
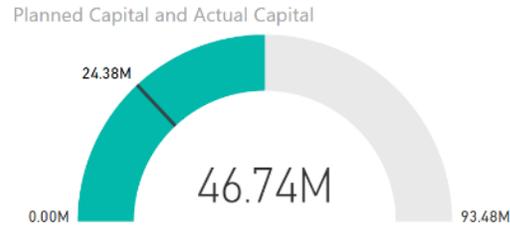
Actuals by Project Type



PPM Dashboard Select All Midwest Northeast Southeast West

46.74M
Planned Capital

6.50M
Planned Expense



36.29M
Funded Capital

4.82M
Funded Expense

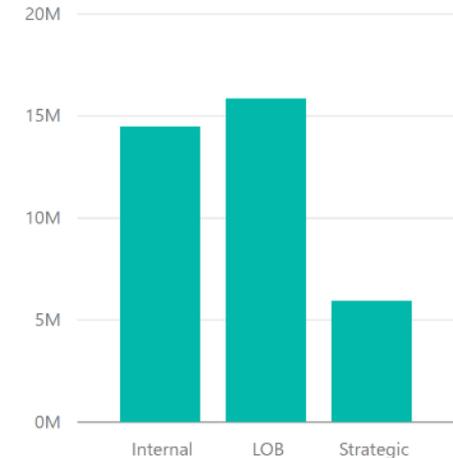
Planned Capital and Planned Expense by Category



Planned Capital and Funded Capital by Category



Funded Capital by Funding Category



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

Team Utilization

% of Plan: **75 %**

28 Planned Team Allocation

21 Actual to Date

Financials

% of Plan: **70 %**

\$400,000 Project Budget

\$280,000 Project Actuals

Actuals

CapEx: **\$100K**

OpEx: **\$180K**

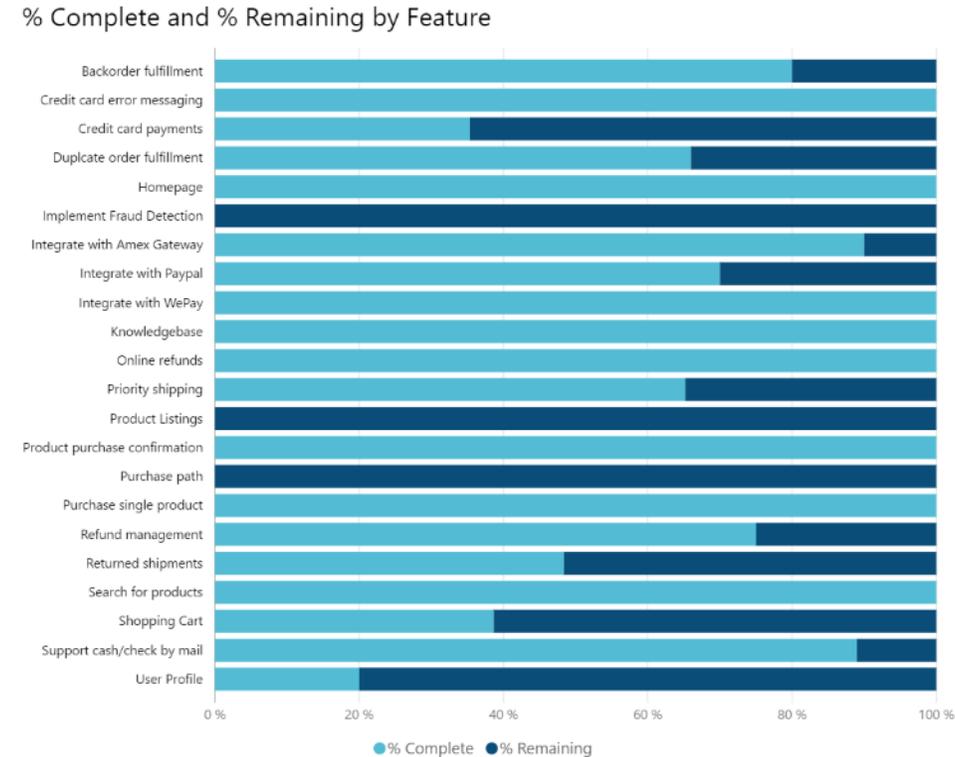
Schedule

% of Plan: **50 %**

12/1/16 Project Start

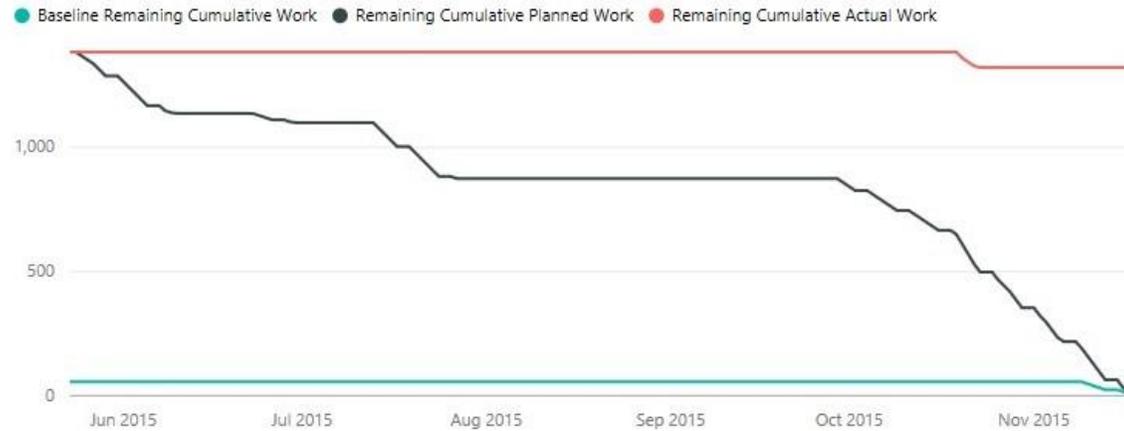
4/1/17 Project Finish

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
Total					1865	\$280,000		

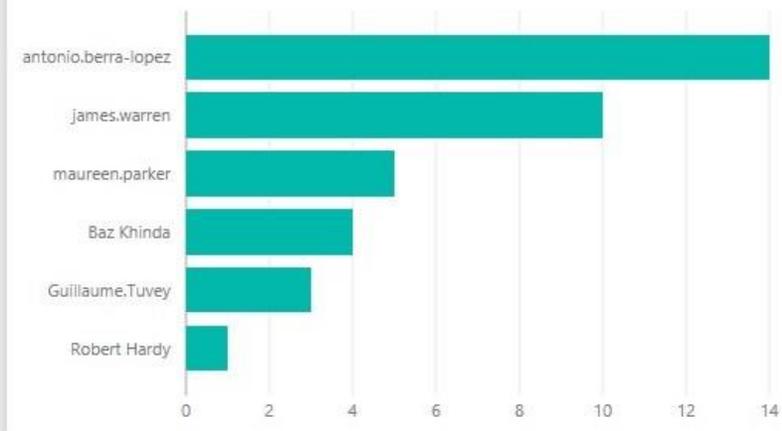


Program Management

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



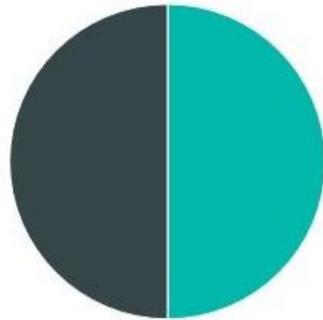
Active Issues

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

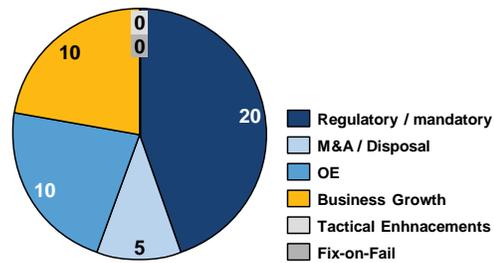
Portfolio Dashboard – Key Metrics

Top 200 Priority Programmes (30 April, 2012)

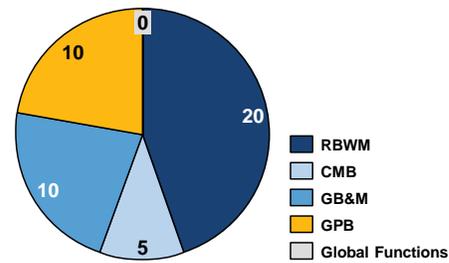
Report Criteria:		Data Availability (% of programmes)
Programme Priority	High priority only	Programme categories 100%
Investment Category	All	Programme RAGs 100%
Business Partner	All	Programme Budget 100%
Region	All	Programme Spend 100%
Approval status / stage	Approved	Programme Risks/Issues 100%

1. Portfolio composition

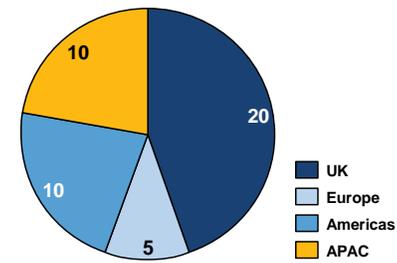
Programmes by Investment Category



Programmes by Customer (Business / GFs)

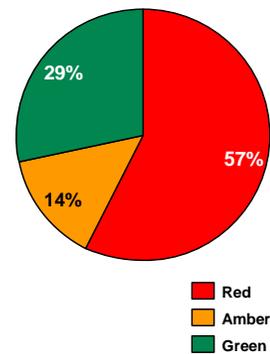


Programmes by Region

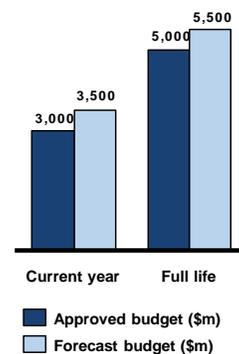


2. Portfolio status (approved in-flight initiatives)

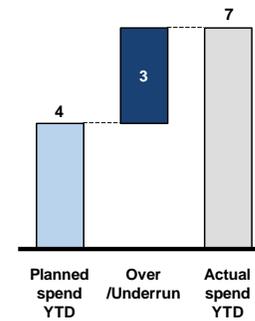
Programmes by RAG Status



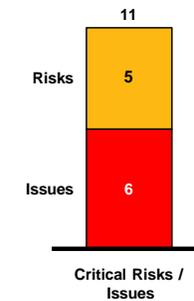
Portfolio Budget Summary



Portfolio Spend Summary

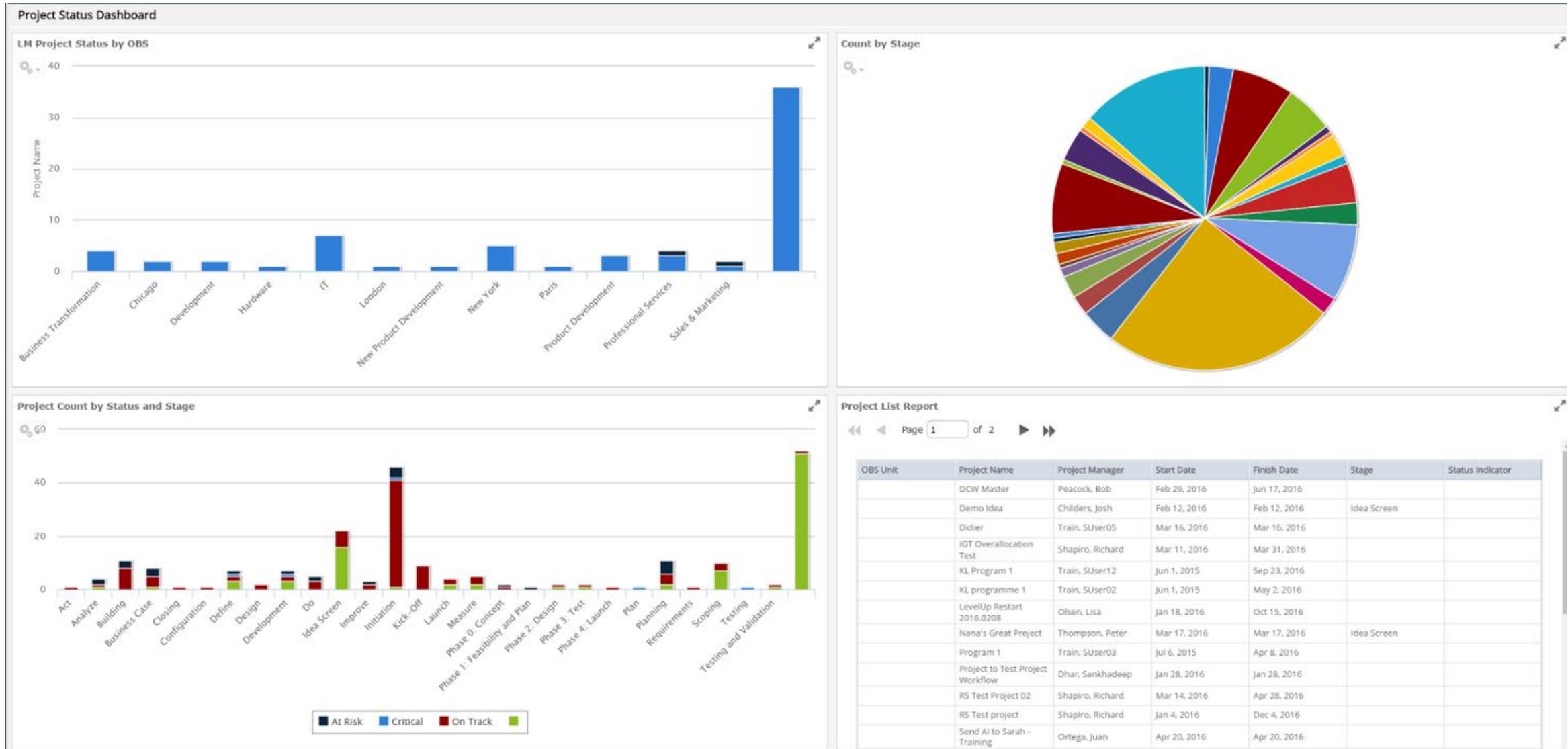


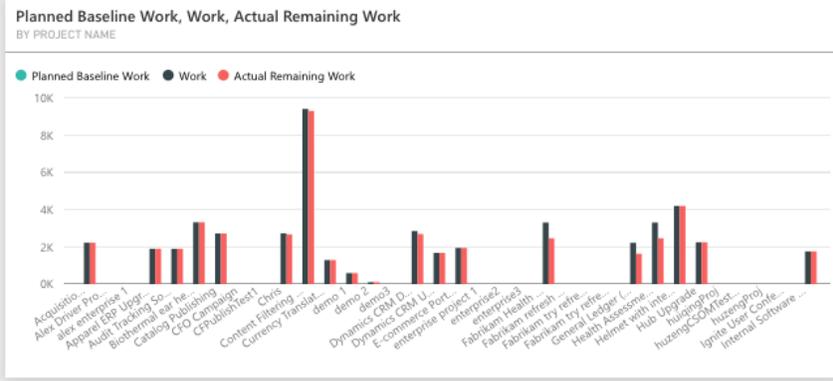
Critical Programme Risks / Issues



Details provided separately

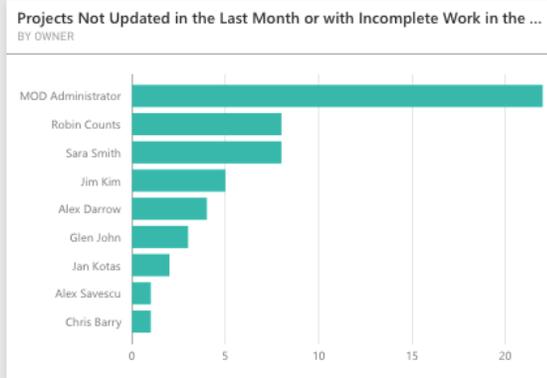
Portfolio Management





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

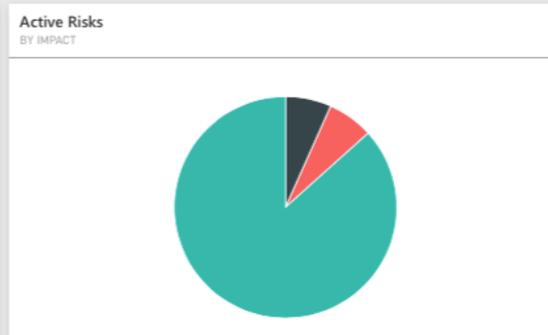
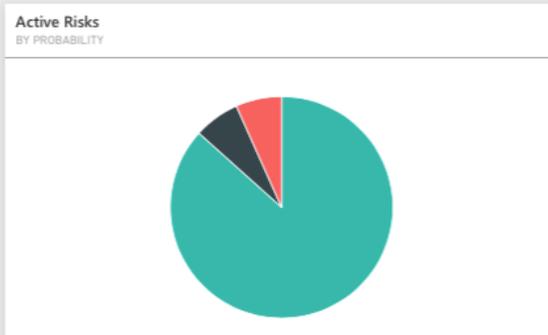
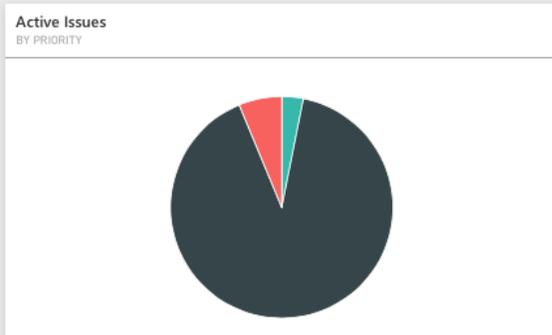


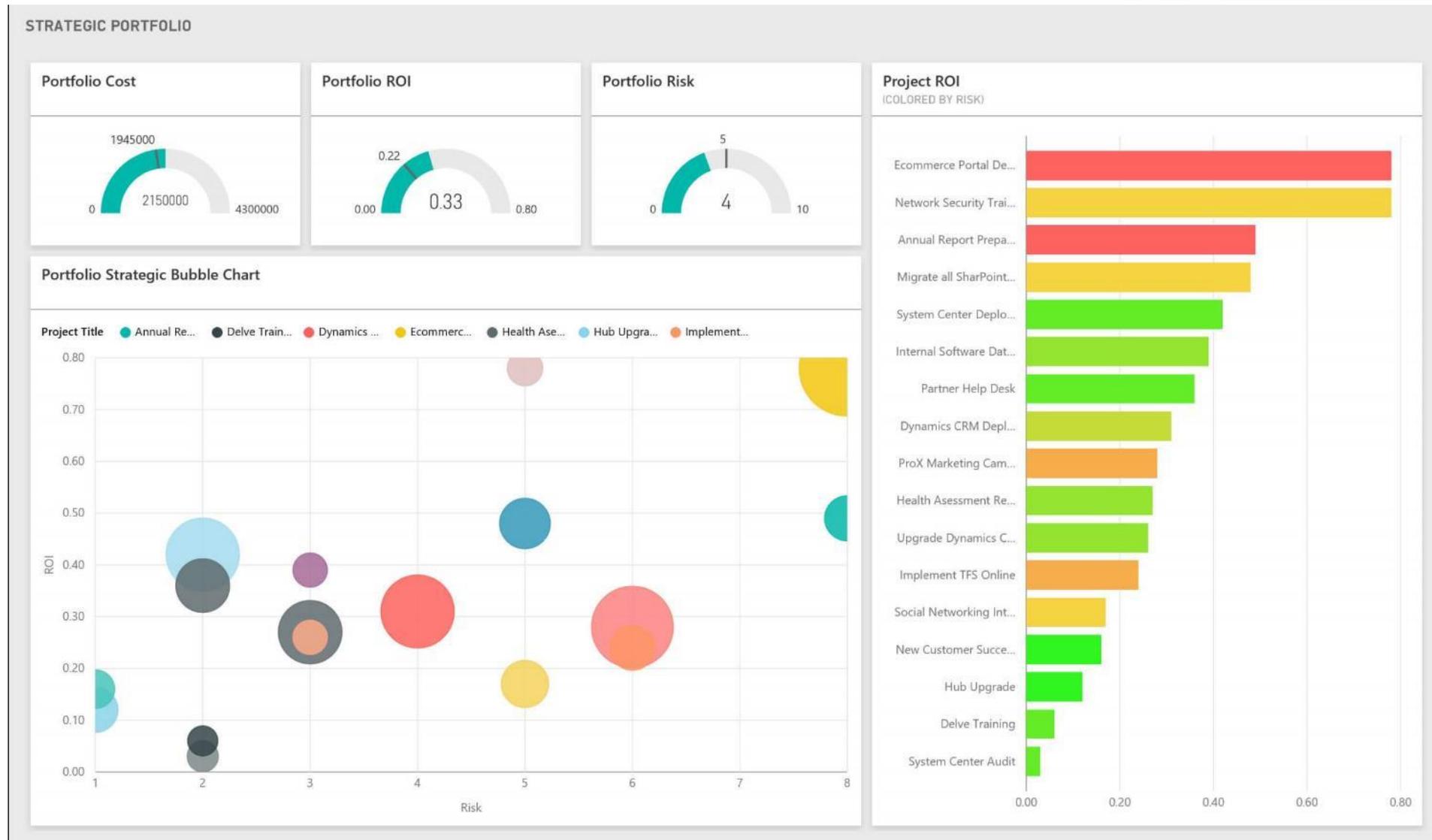
Active Issues

32

Active Risks

15





ITPC Active Project Scorecard

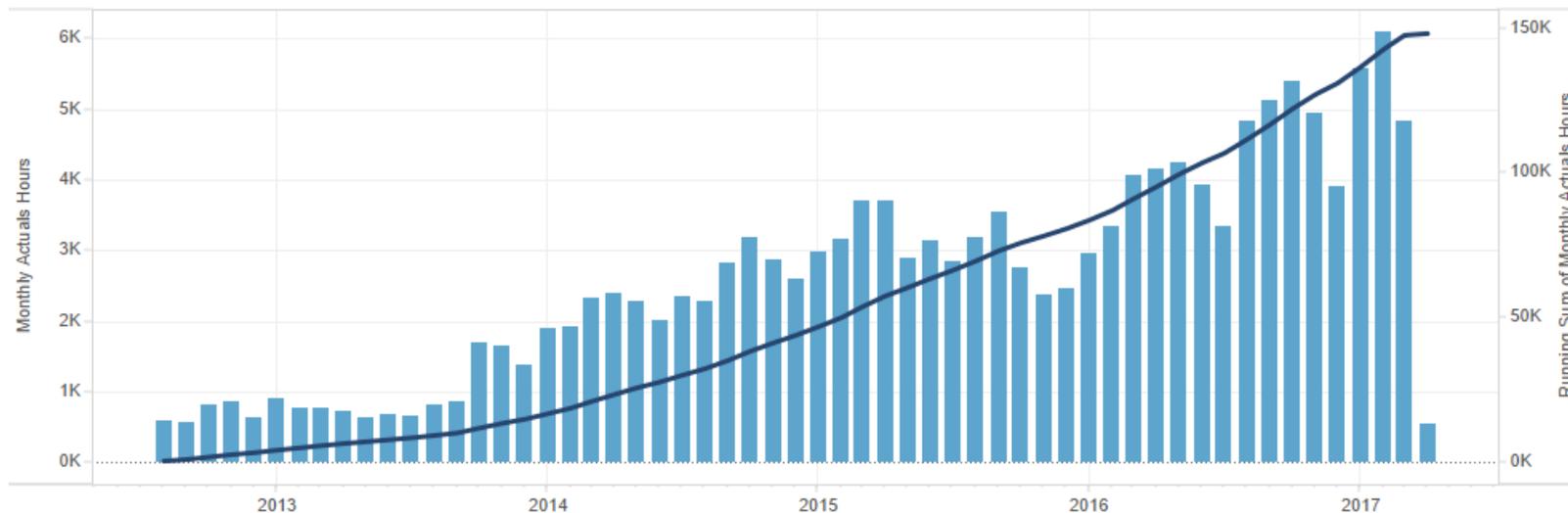
Project Name	Scheduled Finish Date	Project Mgr Name	Project Status as of Date	Project Status Comment	ETC Hours	Total Effort %	Schedule Status	Budget Status	Barrier Status
IAM Phase 2 Subproject	4/20/2020	Cobb, Cynthia	1/9/2017	This is a subproject of IT..	41,949	92%			
ITPC-0359 DARwin Upgrade to u.achieve	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



Risks

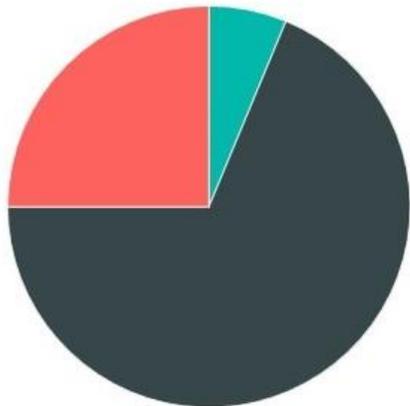
11/18/2015 9:10:00 AM

16
Total Active Risks

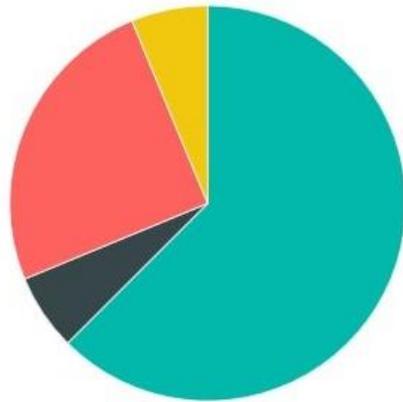
1
Total Postponed Risks

(Blank)
Risks Closed

Total Active Risks by Probability

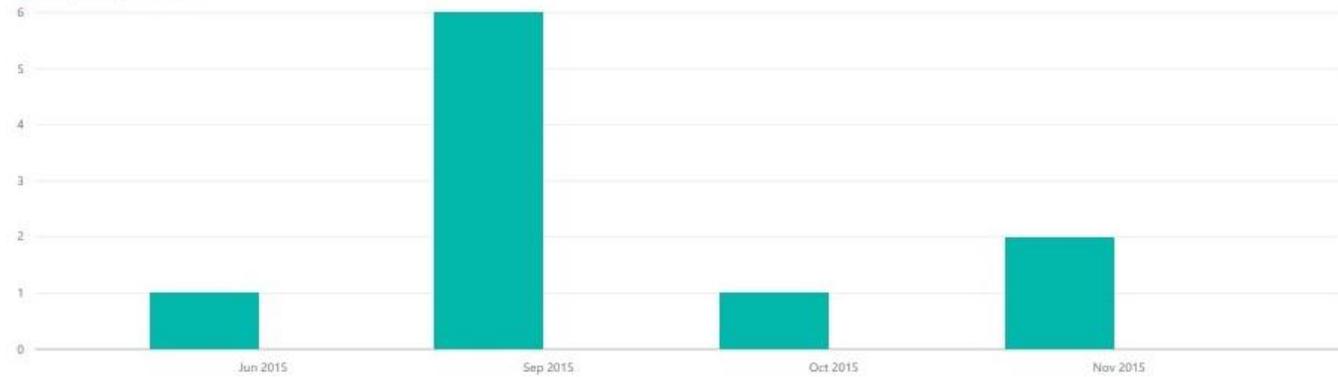


Total Active Risks by Impact



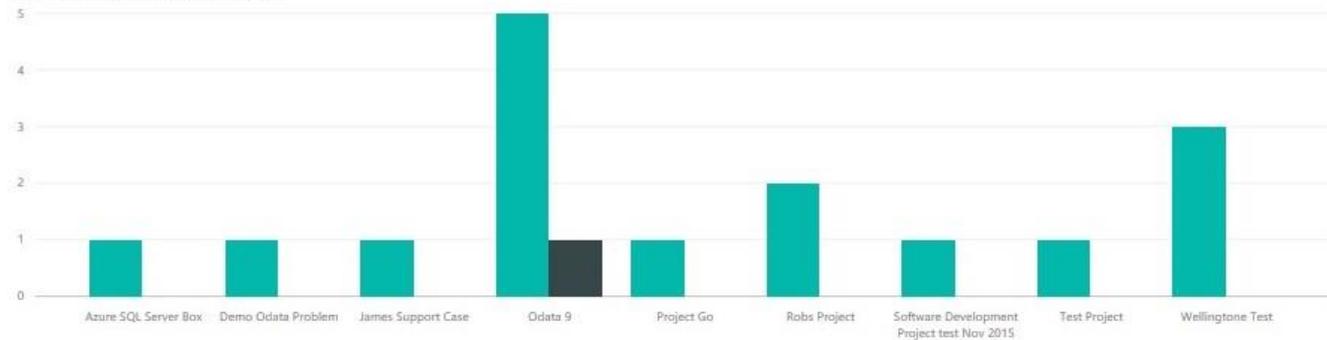
Risks Opened and Risks Closed by Month

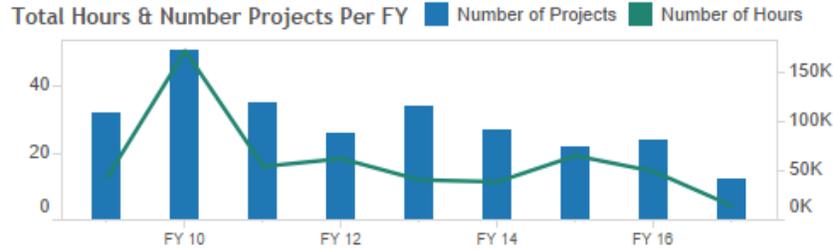
● Risks Opened ● Risks Closed



Total Active Risks and Total Postponed Risks by Project Name

● Total Active Risks ● Total Postponed Risks

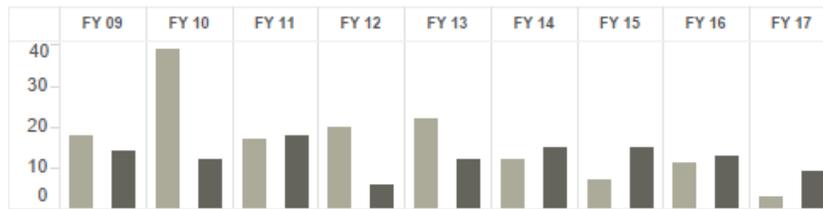




Number of Project Hours Per FY By Area

	FY 09	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	FY 16	FY 17
HR	9,580	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			

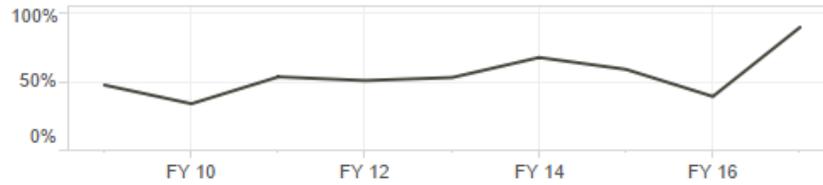
Customer Requested vs Mandatory Completed Number of Projects Per FY



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			

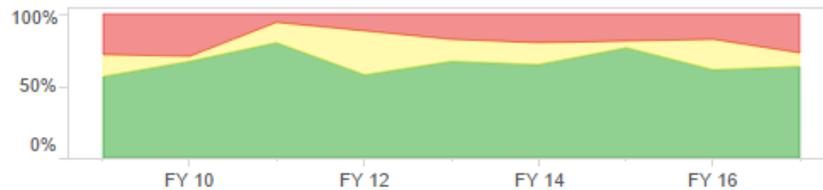
Mandatory Hours (%) Per FY



Schedule Performance

Count of Projects by Status
 ● 157 ▲ 35 ✖ 44

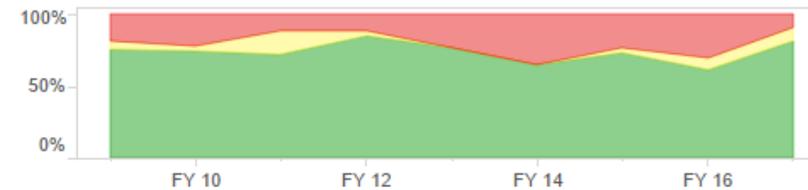
Schedule Performance By FY



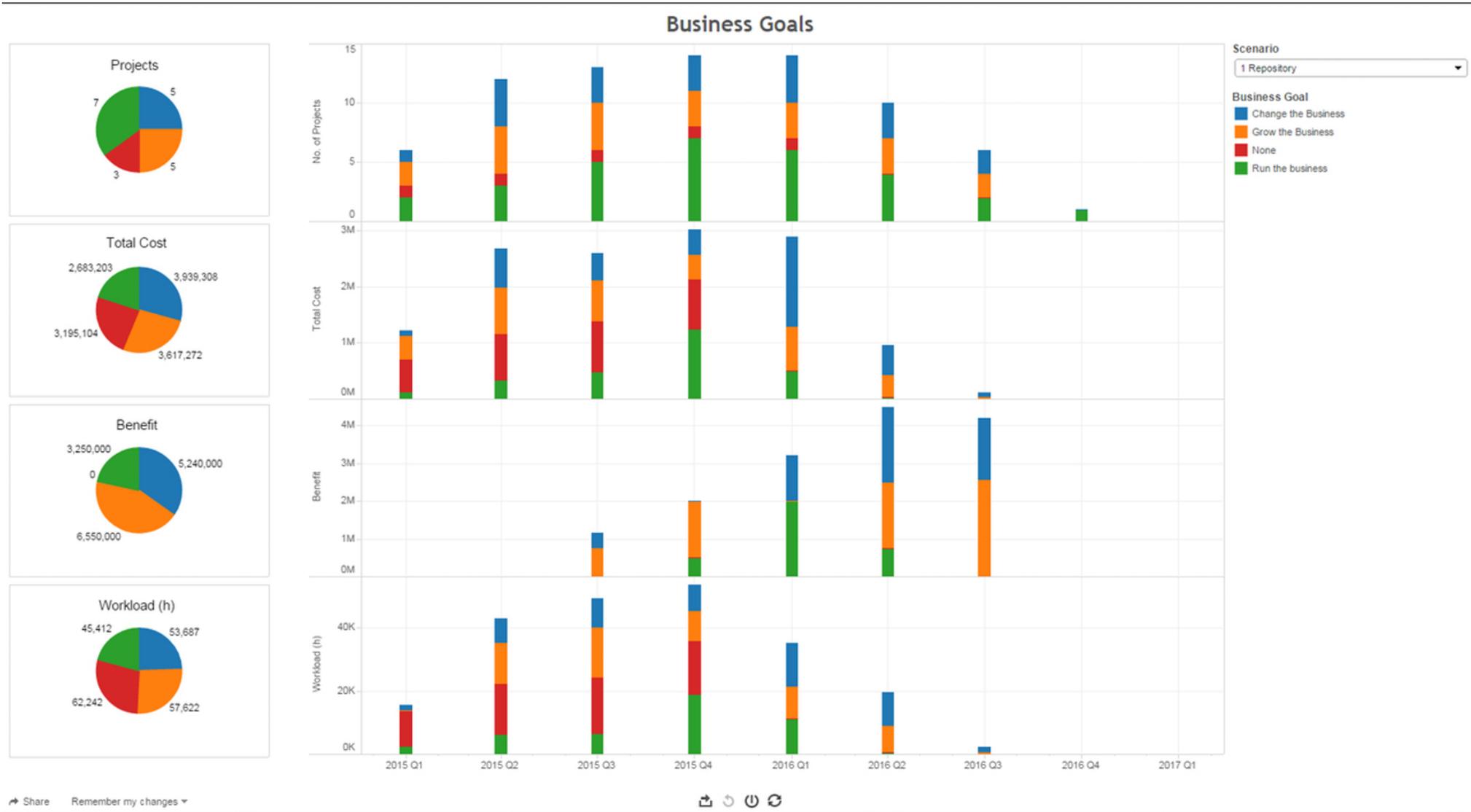
Budget Performance

Count of Projects by Status
 ● 173 ▲ 14 ✖ 49

Budget Performance By FY



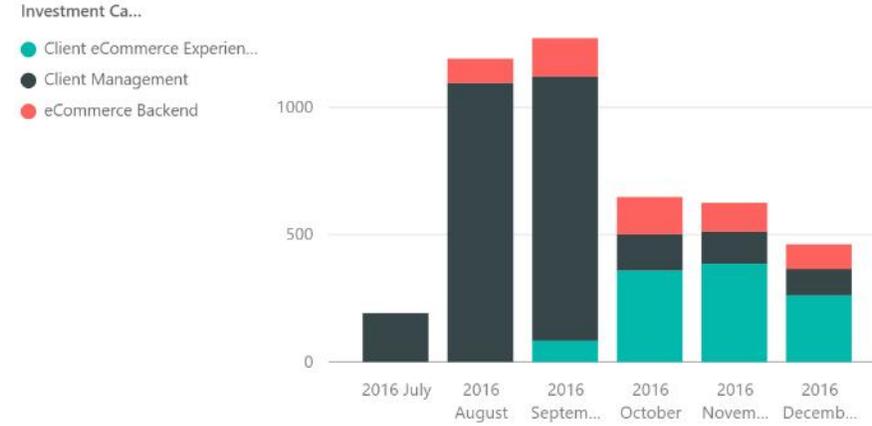
Executive Dashboards



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

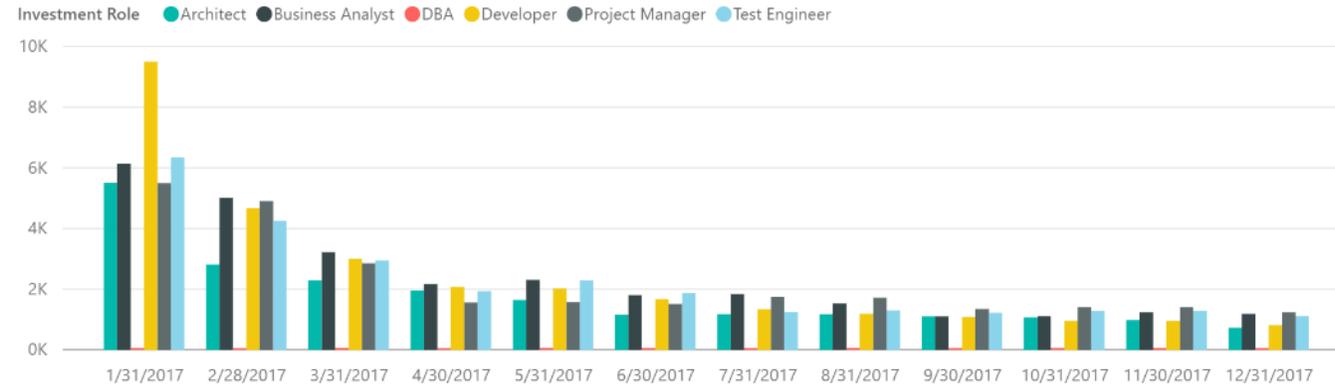
Total Allocation Hours

134.03K

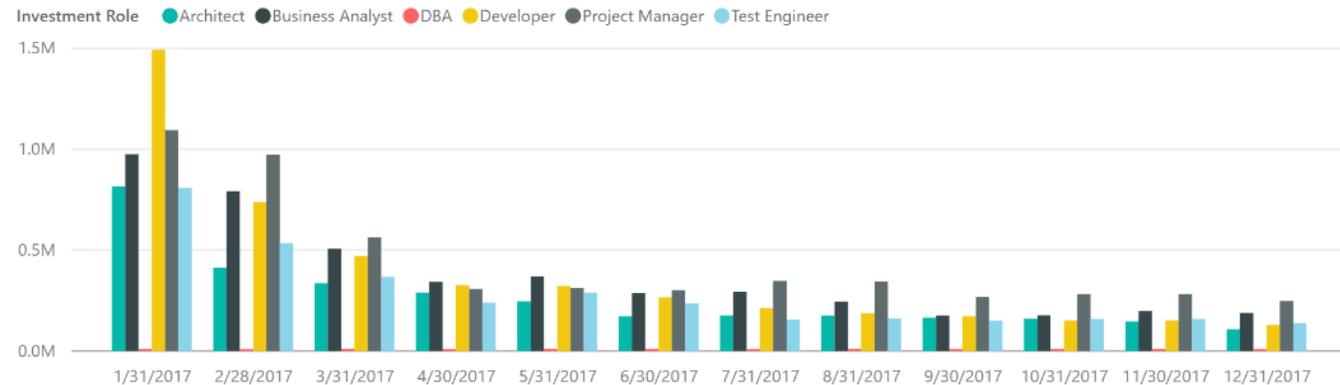
Total Allocation Cost

21.24M

Allocation Hours by Month and Role



Allocation Cost by Month and Role



CA PowerBI – Project/Program – Status

of Change Requests

14

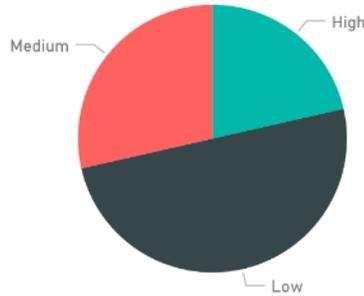
of Approved Change Requests

1

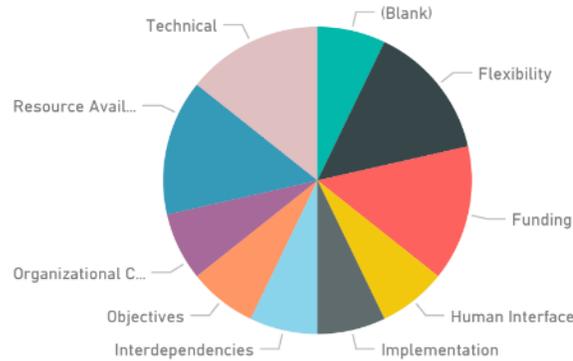
of Open Change Requests

13

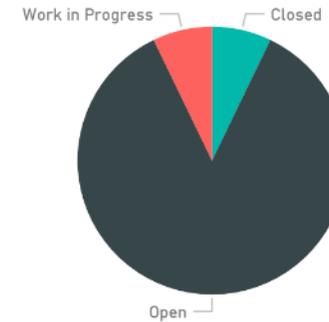
Change Requests by Priority



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

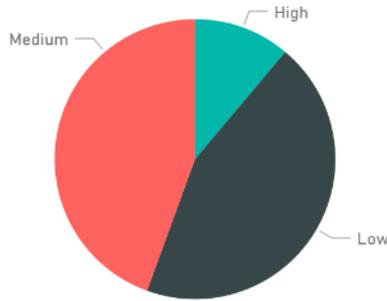
of Resolved Issues

4

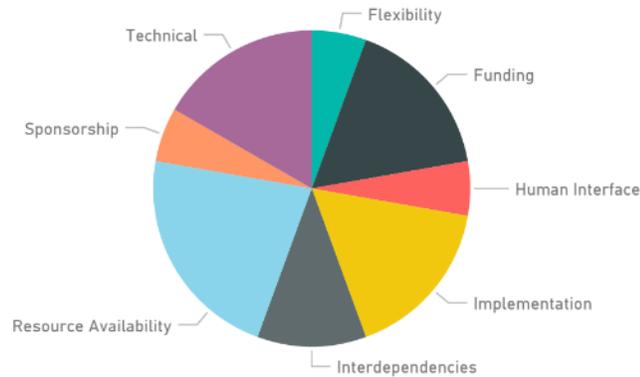
of Open Issues

14

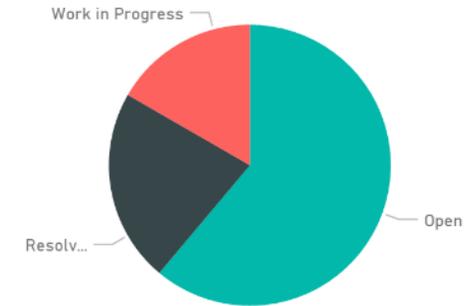
Issues by Priority



Issues by Category



Issues by Status



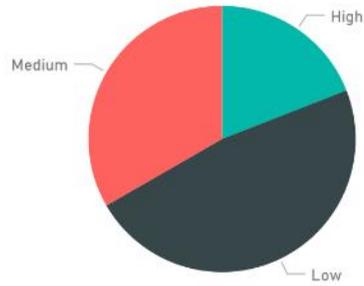
Issue Name	Project Name	Issue Owner	Issue Priori...	Issue Category	Issue Status	Issue Resolved Date	Issue Target Res...
Dependent on Datamart performance	Web Application Enhancement	Sutherland, Joy	Low	Interdependencies	Work in Progress		1/1/2017
Funding is being reduced	Web Application Enhancement	Berry, 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

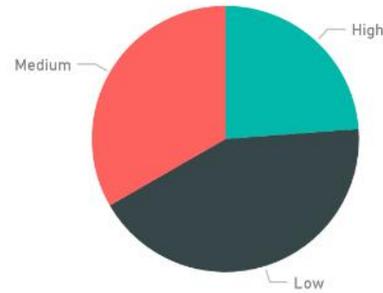
Risks by Priority



of High Probability Risks

5

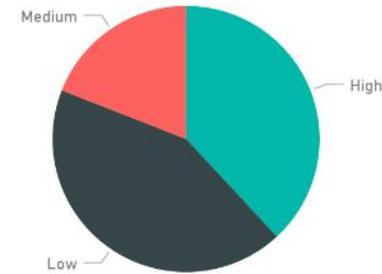
Risks by Probability



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	Oliney, 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 %
--------	---------	----------	----------	------------

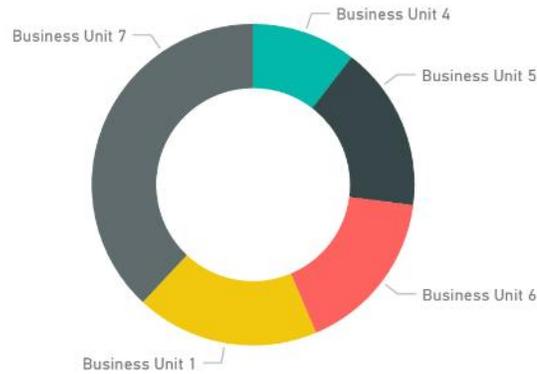
\$1.19M \$800.00K \$920.12K (\$85.93K) -7 %

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

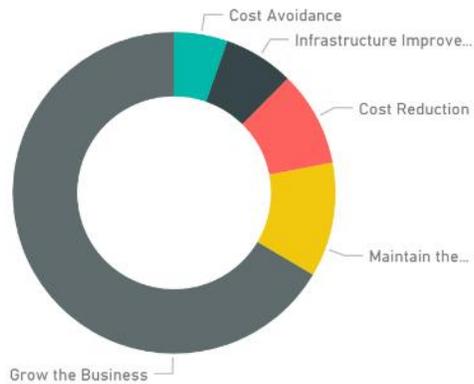
63 % 70 38 % \$10.00M \$5.00M

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
Total										7712	\$1,276,928	

Budget to Forecast Cost Variance by Portfolio



Budget to Forecast Variance by Goal



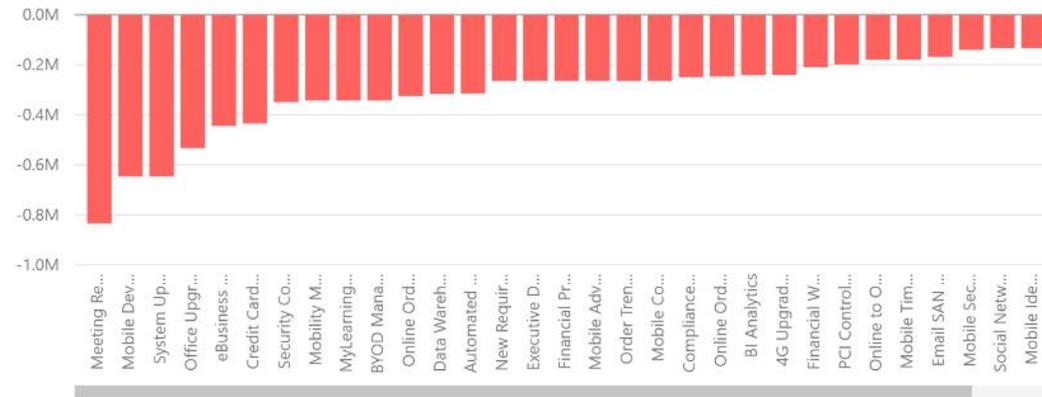
Projects over Budget

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



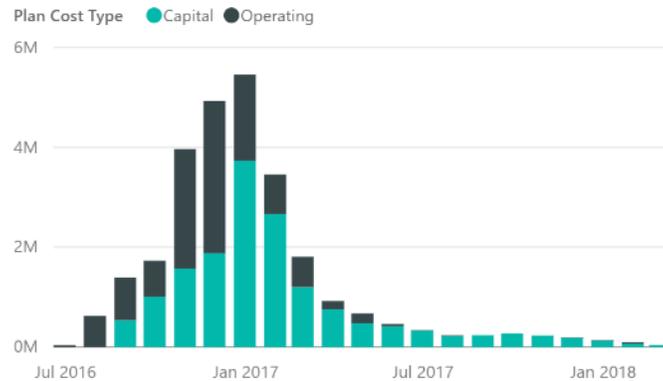
Total Capital Cost

15.94M

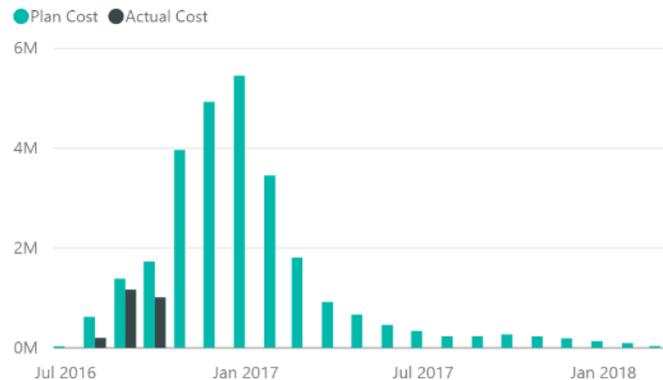
Total Operating Cost

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



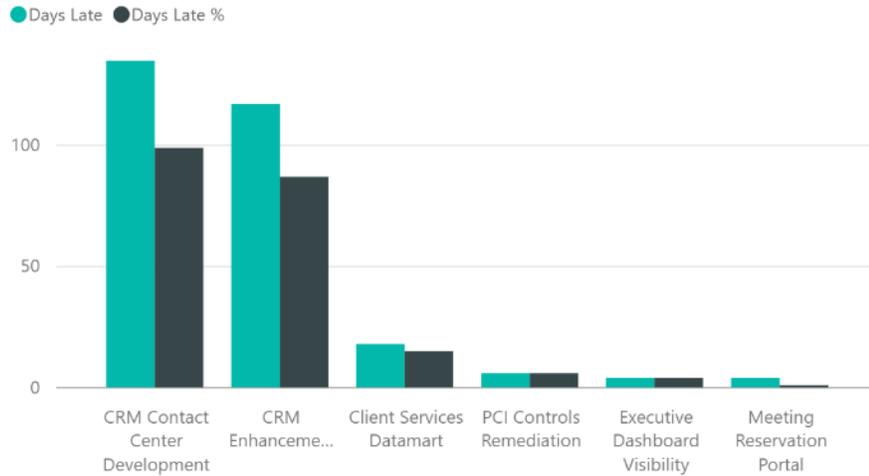
Portfolio Name

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

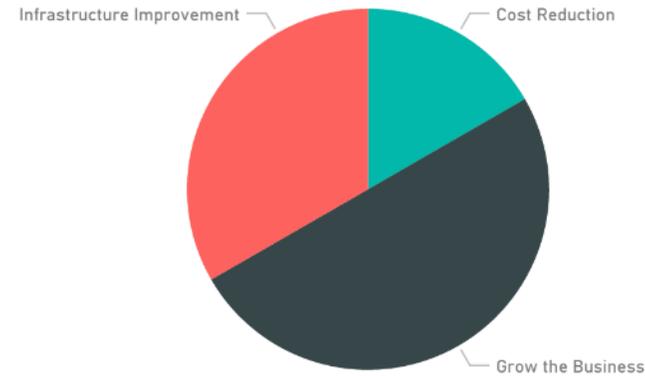
of Late Projects

6

Late Projects

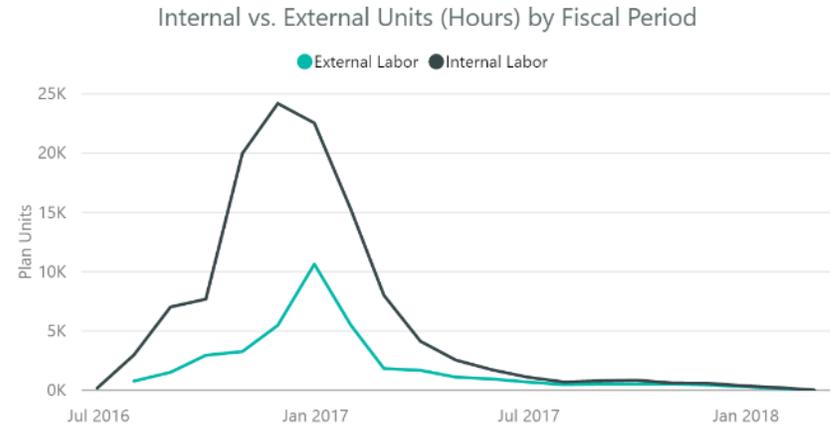
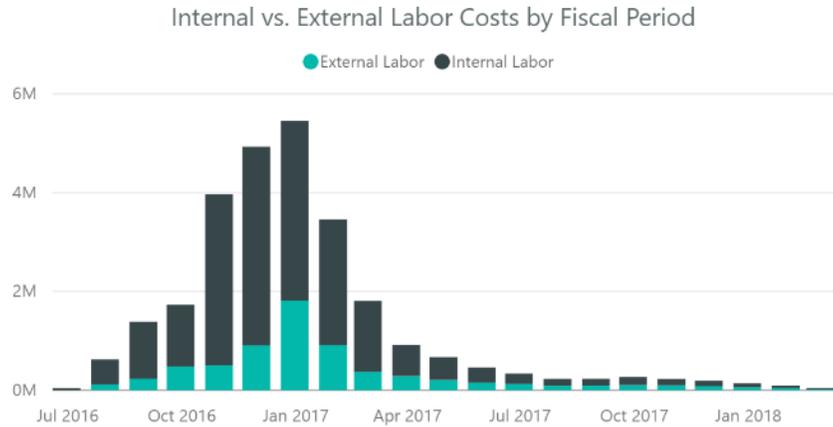


Late Projects by Goal

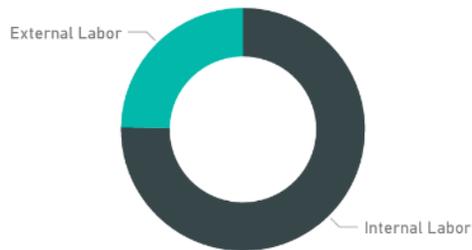


Investment Name	Investment Manager	Goal	Stage	Start Date	Finish Date	Baseline Start	Baseline Finish	Days Late	Average of Days Late %
PCI Controls Remediation	Reed, Henry	Infrastructure Improvement	Initiation	11/14/2016	3/9/2017	11/14/2016	3/3/2017	6	6.00
Client Services Datamart	Martin, Paul	Infrastructure 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
Total								284	17.67

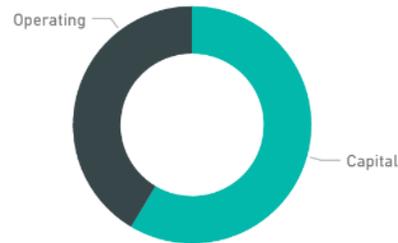
Portfolio	Calendar Year	Total Spend	Internal Labor Cost	External Labor Cost	Internal Labor Hours	External Labor Hours
<input type="checkbox"/> Business Unit 1 <input type="checkbox"/> Business Unit 2 <input type="checkbox"/> Business Unit 4 <input type="checkbox"/> Business Unit 5 <input type="checkbox"/> 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



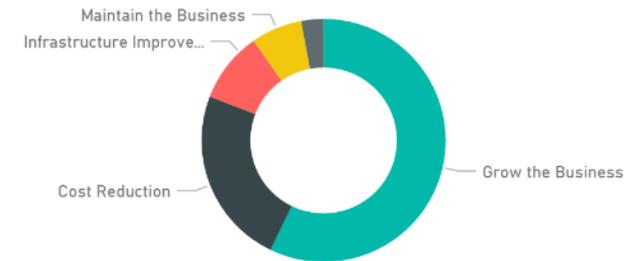
Plan Cost by Plan Transaction Class



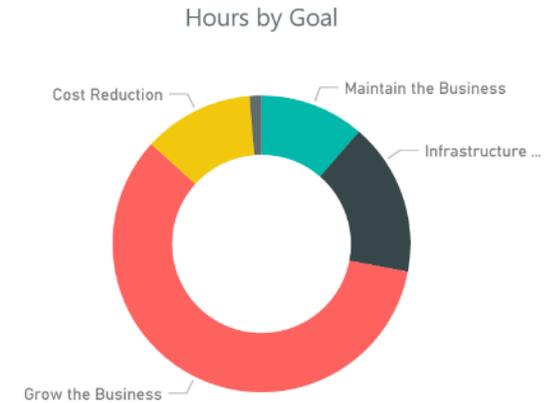
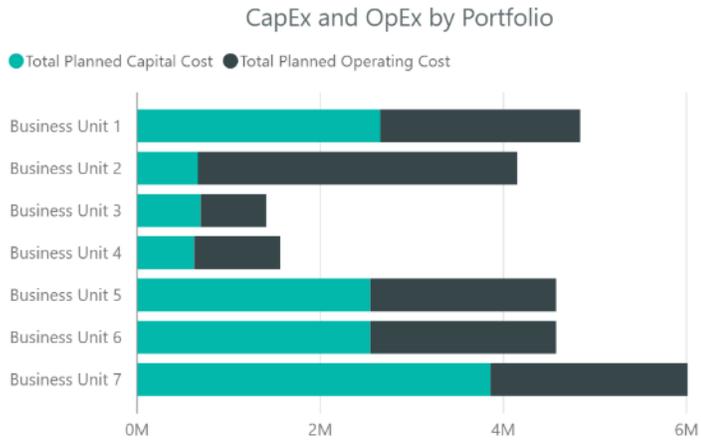
Plan Cost by Plan Cost Type



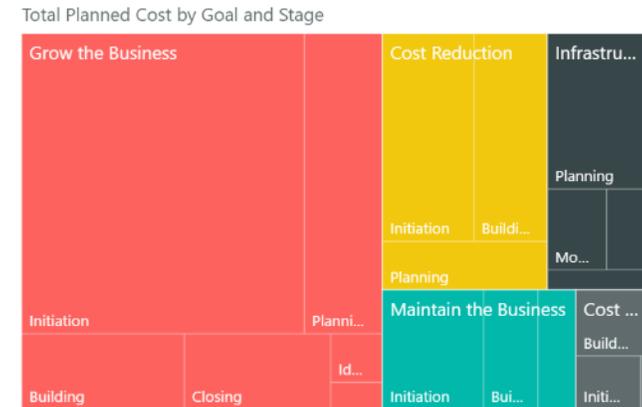
Plan Cost by Goal



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
Total				27,126,660.00	13,595,840.00



Questions?



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- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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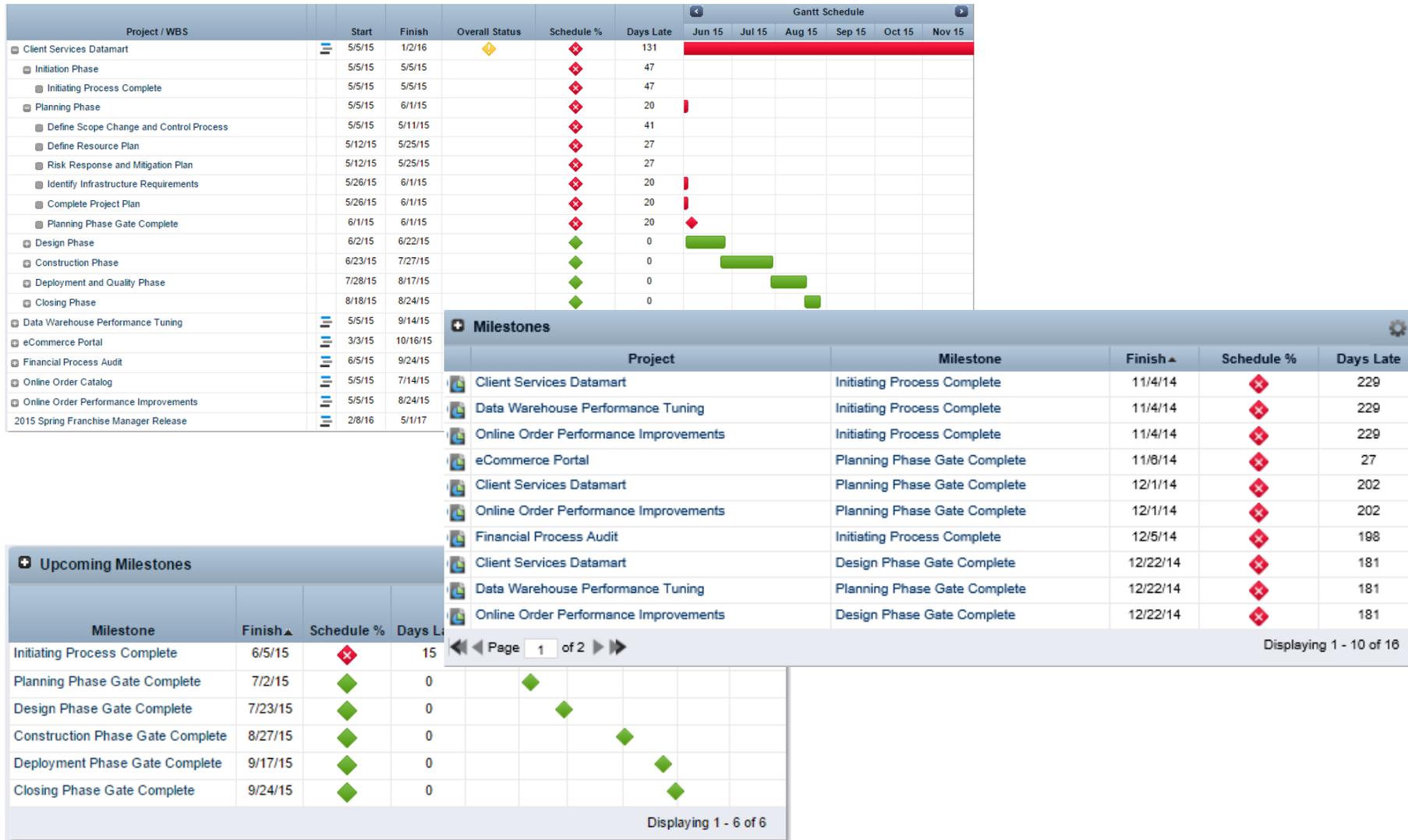
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APPENDIX: OOTB Metric Dashboards

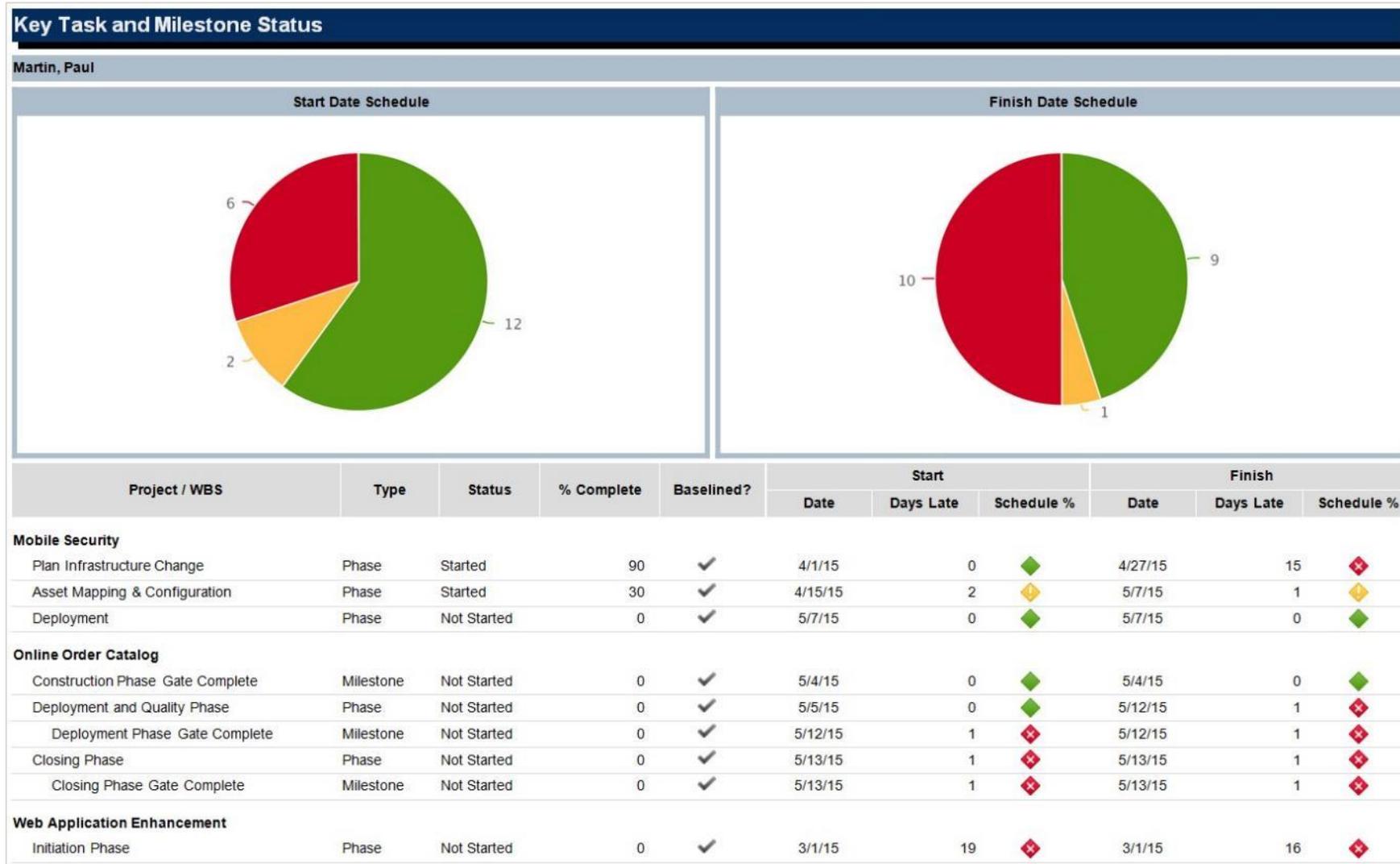


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OOTB Metrics – Tasks



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	❖
Total						333	2,460	76	2,384	2,460	0	

Displaying 1 - 17 of 17

Project KPIs by OBS

[Filter: None] | [Change]

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	❖	❖	❖	❖	❖	❖

Displaying 1 - 14 of 14

OOTB Metrics – Project/Program - Status

Status Report Review: Status Report Listing

OBS Project Manager Filter More

Status Report Listing

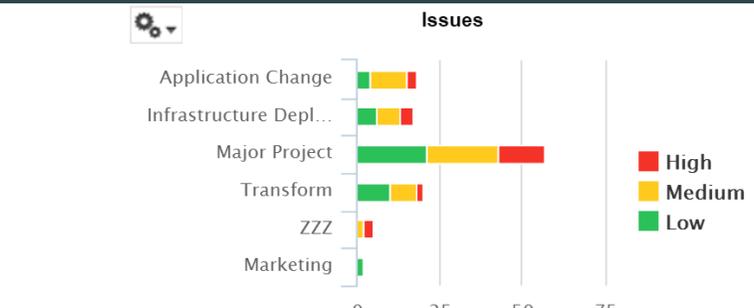
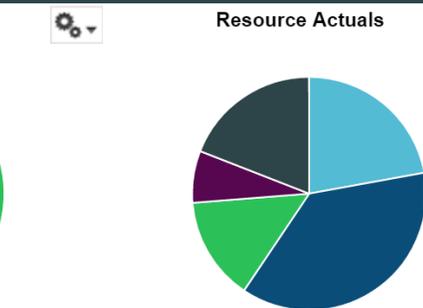
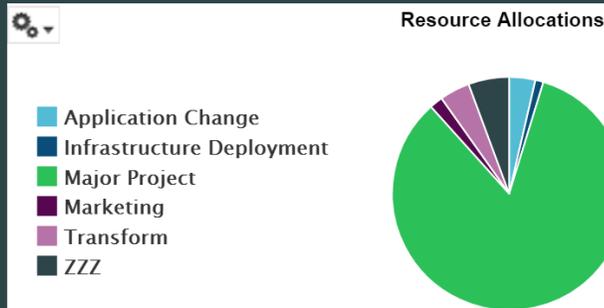
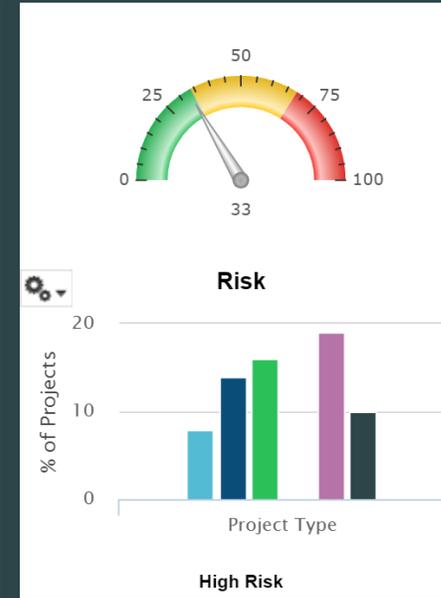
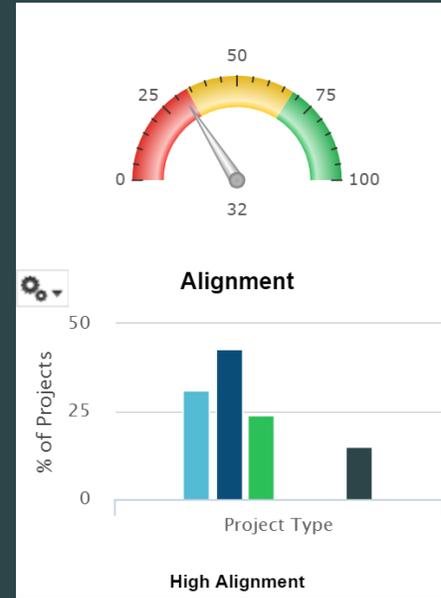
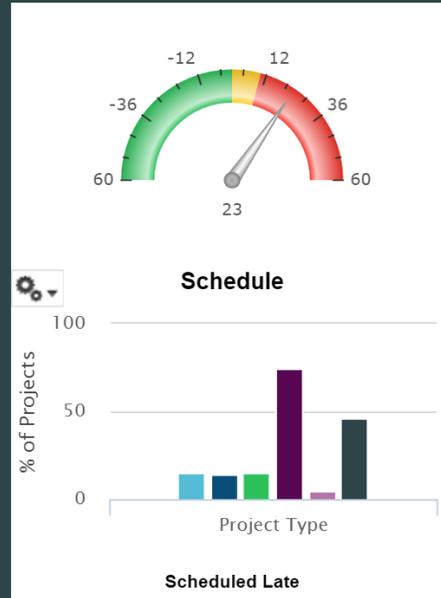
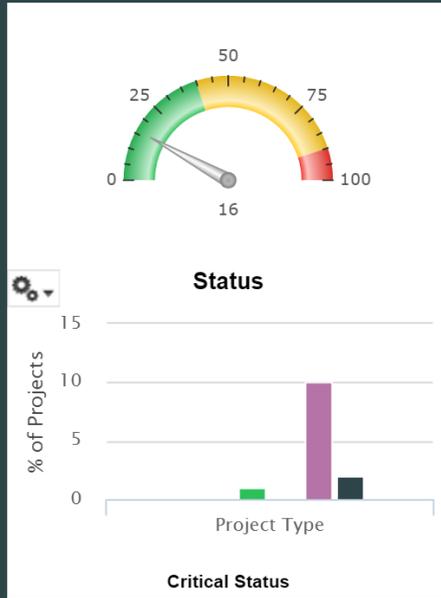
Project▲	Manager	Overall Status	Status Report Update	Report Date	Report Status	Schedule	Scope	Cost and Effort
A Fantastic Project	Thomas, Brian	⬇		4/30/15	Draft	⬇	⬇	⬆
A Fantastic Project	Thomas, Brian	⬇	We have run into challenges but are hoping to bring things around	3/27/15	Final	⬇	⬇	⬆
A Fantastic 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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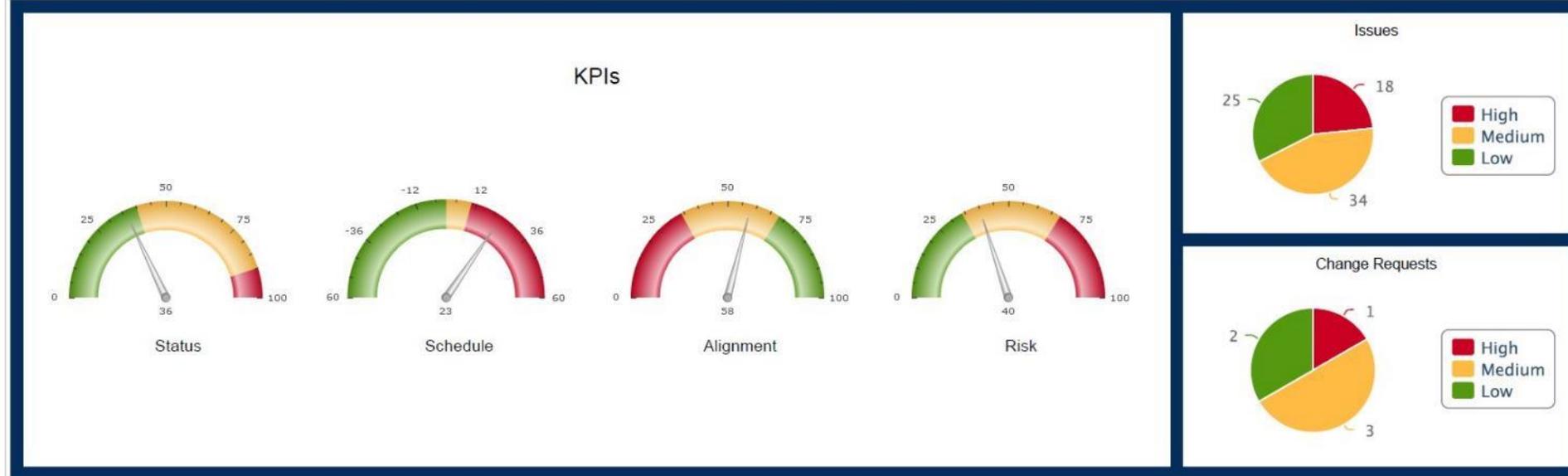
OOTB Metrics – Project/Program Health

KPIs by Project Type



OOTB Metrics – Project/Program – Health

Top 50 Project Watchlist

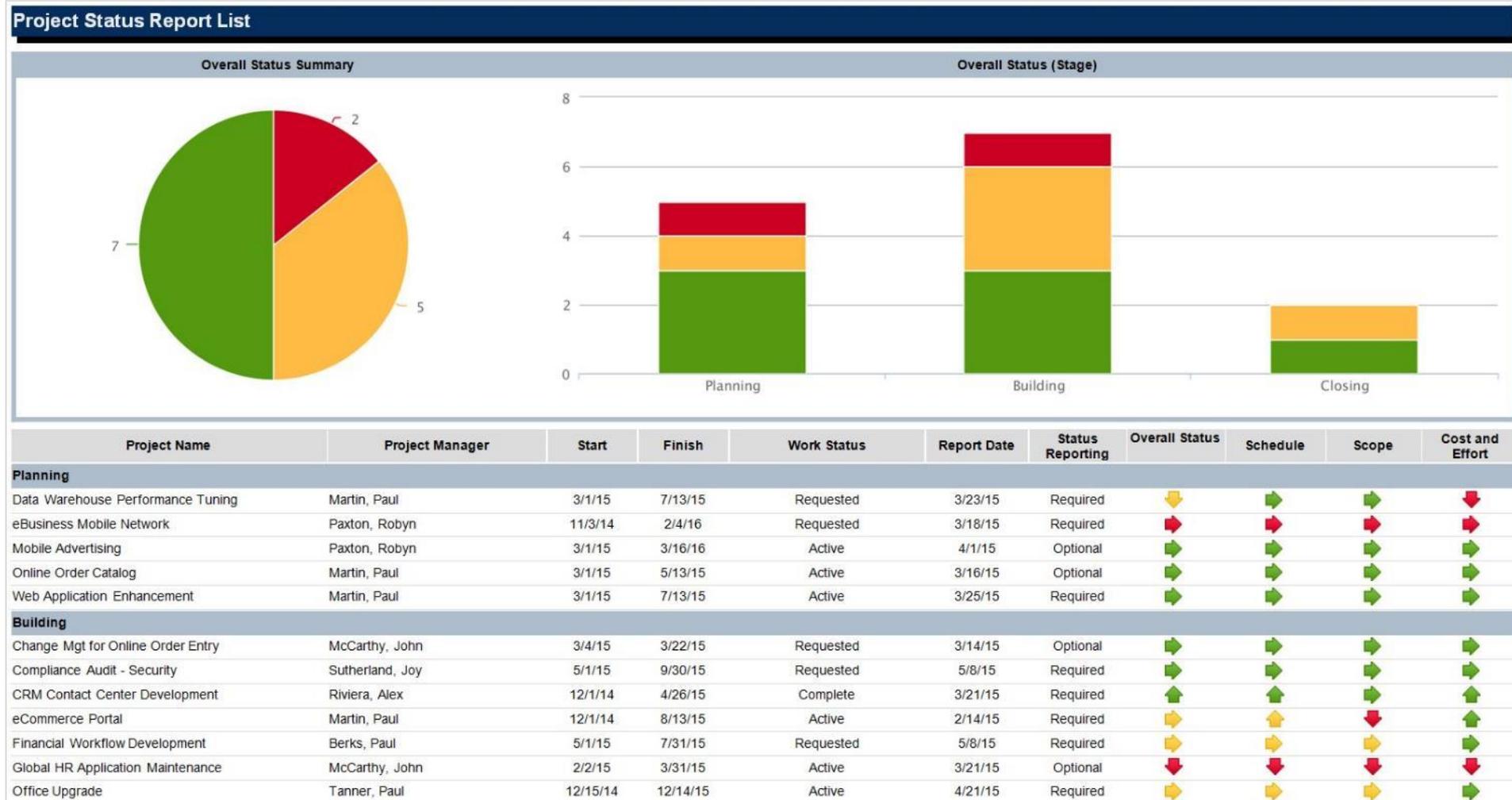


#	Project Name	Project Type	Status	Schedule	Alignment	Risk	Issues	CRs	Resource Allocations	Planned Cost
1	XPL Translations	Major Project	⬇️	⬆️	⬇️	⬆️	⬆️	⬆️	25,404	2,474,260.00
2	Meeting Reservation Portal	Major Project	⬆️	⬆️	⬇️	⬆️	⬇️	⬆️	18,816	834,950.00
3	eBusiness Mobile Network	Major Project	⬇️	⬇️	⬆️	⬆️	⬇️	⬆️	15,792	646,260.00
4	Mobile Time and Approvals	Application Change	⬆️	⬇️	⬆️	⬆️	⬇️	⬆️	12,796	179,960.00
5	Mobile Device Management (MDM) Deployment	Major Project	⬆️	⬆️	⬇️	⬇️	⬇️	⬆️	12,576	646,260.00
6	Office Upgrade	Major Project	⬇️	⬆️	⬇️	⬇️	⬇️	⬆️	12,528	646,260.00
7	System Upgrade Release 14	Major Project	⬆️	⬆️	⬇️	⬇️	⬇️	⬆️	12,480	646,260.00
8	Mobile Advertising	Major Project	⬆️	⬇️	⬇️	⬇️	⬇️	⬆️	12,332	264,400.00
9	HR Online Benefits Security Upgrade	Major Project	⬆️	⬇️	⬇️	⬇️	⬆️	⬆️	6,872	584,800.00
10	Online Order Performance Improvements	Infrastructure Deployment	⬇️	⬇️	⬇️	⬇️	⬇️	⬇️	6,728	236,400.00
11	Mobility Management Services	Major Project	⬇️	⬆️	⬆️	⬆️	⬇️	⬆️	6,552	343,020.00

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																							
Plan	12/1/14	8/13/15	Schedule																							
Baseline	12/1/14	8/11/15	Scope																							
Days Late	0	2	Cost and Effort																							
			Financial Performance																							
			Estimate To Complete	1,528.20	Planned Benefit																					
			Estimate At Completion	2,311.20	Planned Cost																					
			EAC to Baseline Variance	55.00	Actual Cost																					
			Remaining Allocation	745.20	Estimate At Completion																					
			Allocation to ETC Variance	136.80	EAC to Planned Variance																					
					Planned ROI																					
					Planned Breakeven																					
					8/31/15																					
Project Objective			Key Accomplishments																							
Development of a new portal for all Online Client Services.			Key Accomplishments for this week:																							
			<ul style="list-style-type: none"> - 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.			The following reviews are scheduled for next week:																							
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.			<ul style="list-style-type: none"> - User acceptance test results - Change Requests - Monthly Project Review 																							
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																				

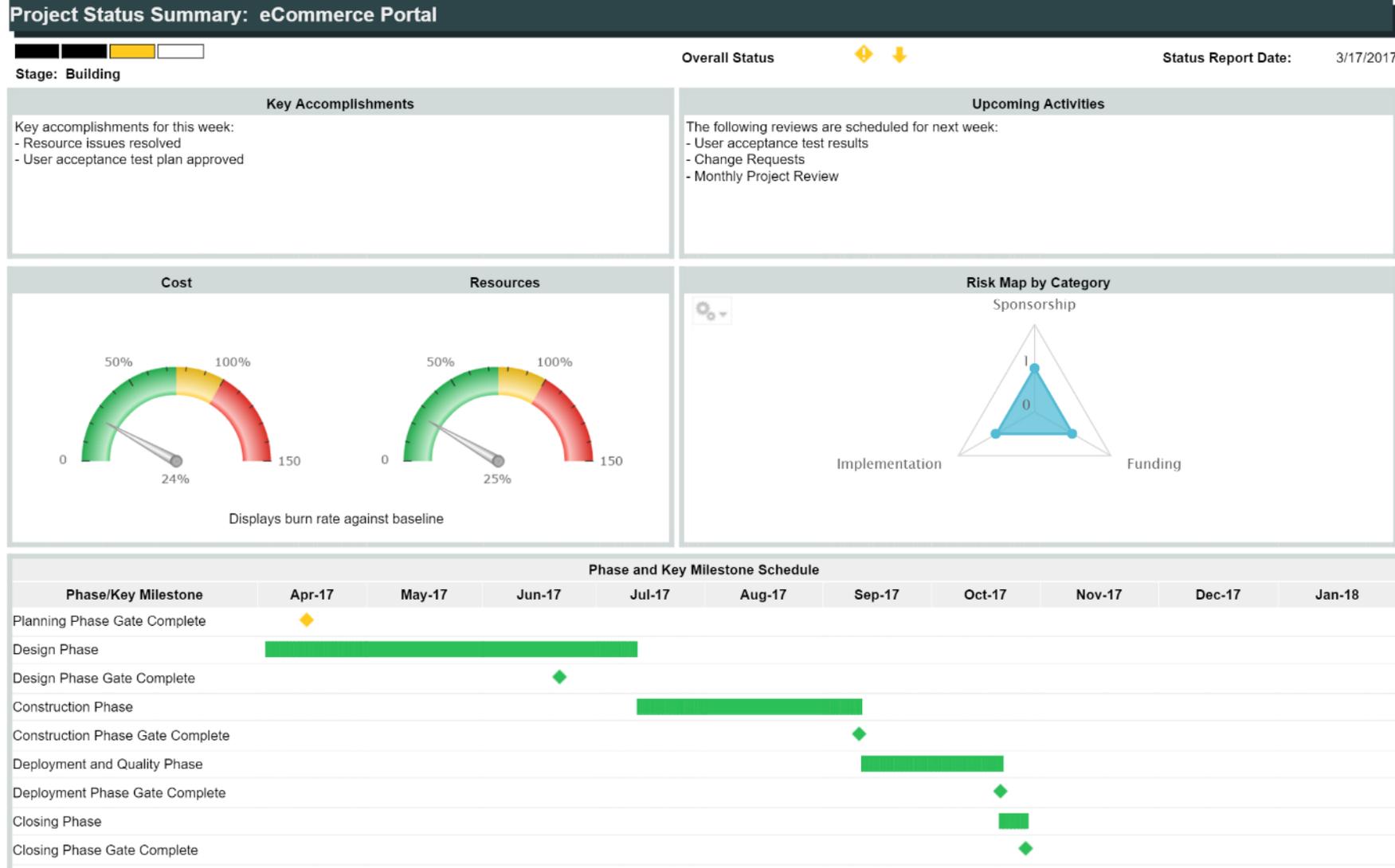
OOTB Metrics – Project/Program – Health



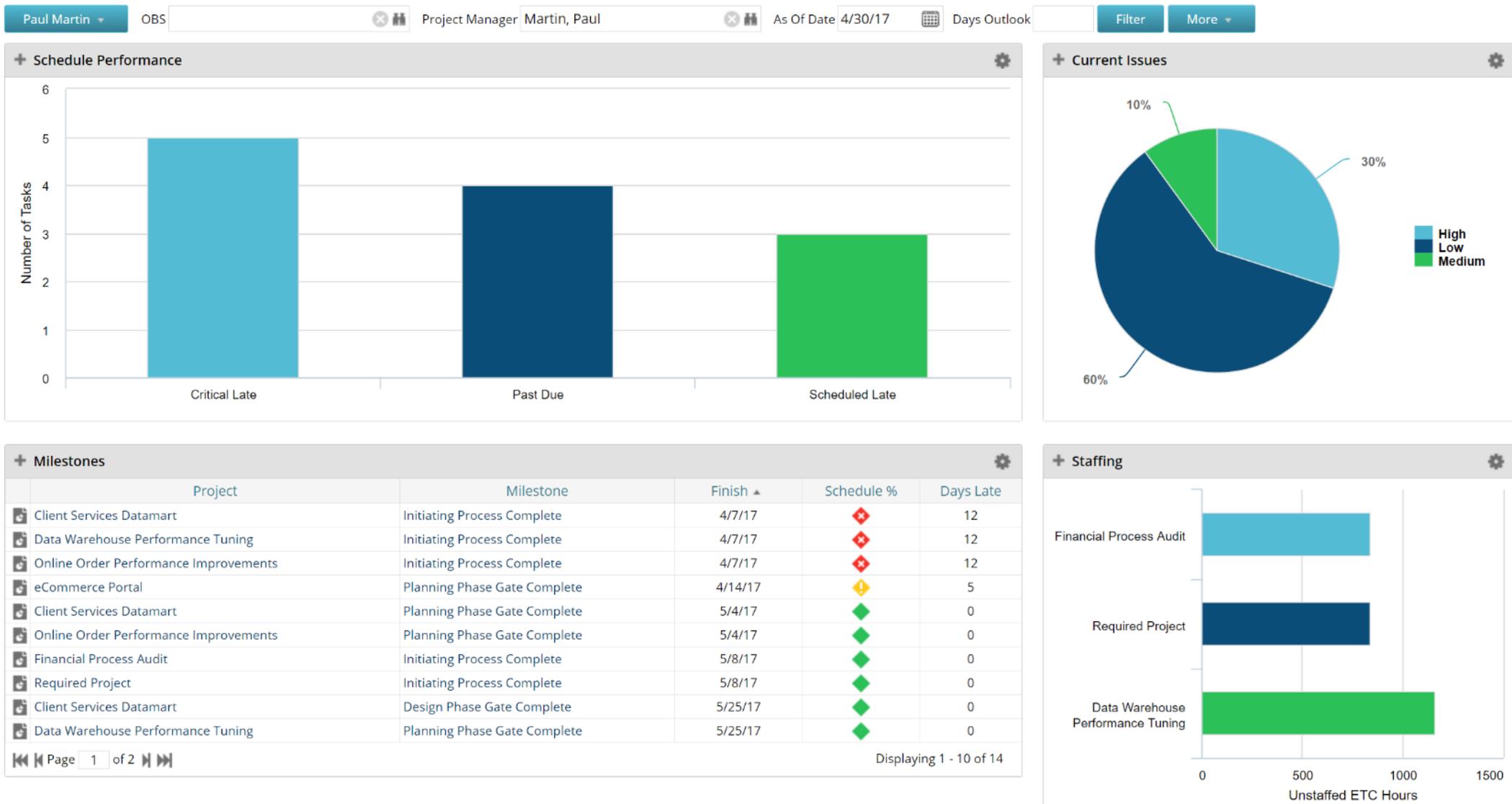
OOTB Metrics – Project/Program – Health



OOTB Metrics – Project/Program – Health



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

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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

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

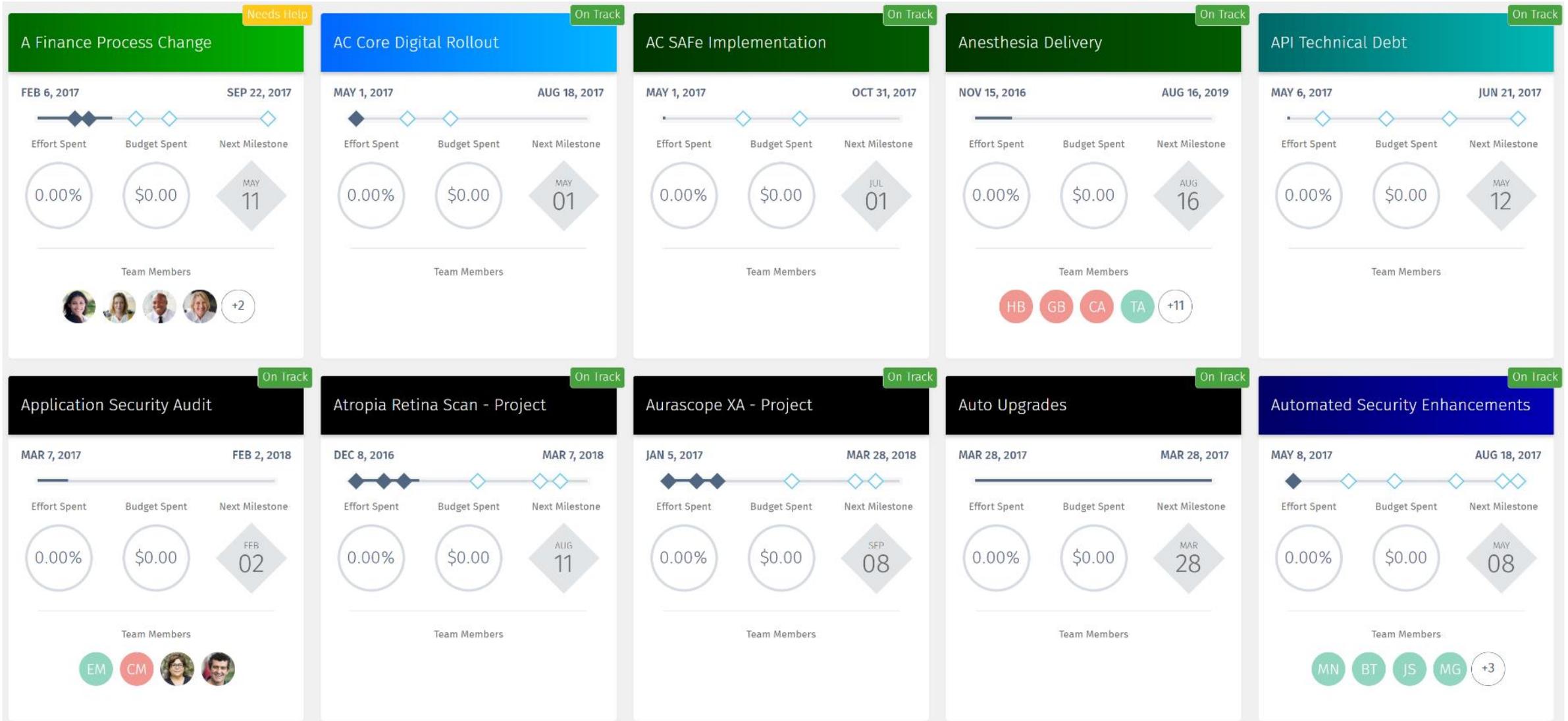
Populate Project Manager?
 Project Manager
 Available: 31 Selected: 31

- 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	XPL Translations	Major Project	⬜	🟩	⚠️	⬜	🟩	🟩	48,880	71,600.00
2	Critical Care Vent - home version	Major Project	⬜	🟩	🟩	⚠️	🟩	🟩	48,828	0.00
3	Web Based Trading	Major Project	⬜	🟩	⚠️	🟩	🟩	🟩	39,120	0.00
4	Personalized online shopping experience	Application Change	🟩	🔴	⚠️	🟩	🟩	🟩	33,790	400,000.00
5	Web Application Enhancement	Major Project	🟩	🔴	⚠️	🔴	⚠️	🔴	26,281	244,000.00
6	Minimal Online Shopping Site	Major Project	⚠️	🔴	⚠️	🟩	🟩	🟩	23,386	400,000.00
7	Portfolio Initiative	Major Project	🟩	🔴	⚠️	⚠️	🟩	🟩	19,190	192,720.00
8	Collaboration Initiative	Major Project	🟩	🔴	⚠️	⚠️	🟩	🟩	17,558	192,720.00
9	Maintain legacy purchasing system	Major Project	🟩	🔴	⚠️	🟩	🟩	🟩	16,605	600,000.00
10	Modernize customer service portal	Major Project	🟩	🔴	⚠️	⬜	🟩	🟩	15,670	750,000.00

OOTB Metrics – Project/Program – Health

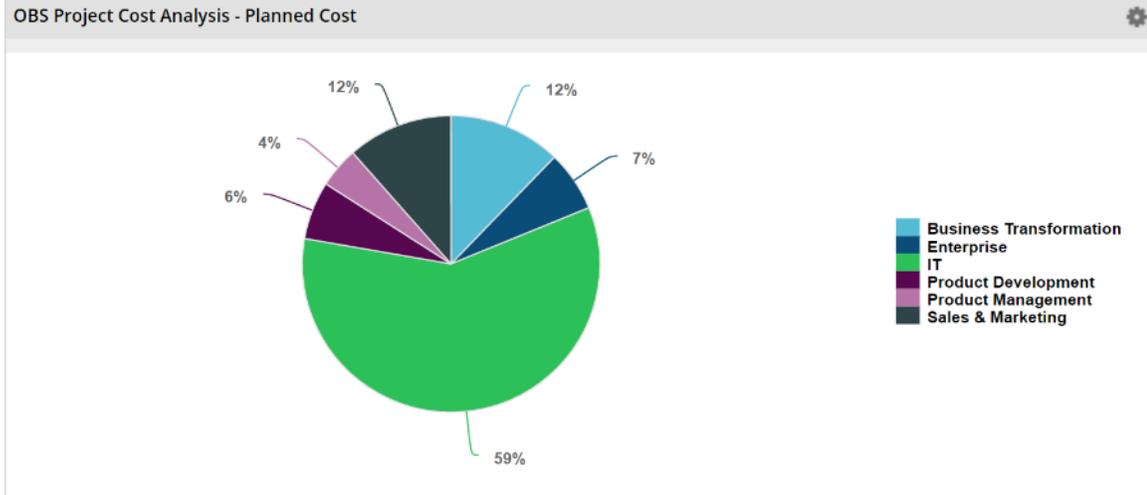


OOTB Metrics – Financial

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
Capital													
External Labor													
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
Internal Labor													
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
Budget	4,147,139	204,743	209,102	187,505	190,438	219,111	170,400	126,720	194,000	596,640	492,120	763,600	792,760
Forecast	4,124,126	204,743	209,102	218,505	214,425	219,111	156,400	97,600	159,120	596,640	492,120	763,600	792,760
Variance	23,013	0	0	-31,000	-23,987	0	14,000	29,120	34,880	0	0	0	0
Operating													
External Labor													
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
Internal Labor													
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
Budget	2,482,120	158,660	119,855	107,184	112,965	89,107	33,600	147,200	94,480	485,260	651,820	595,080	474,680
Forecast	2,409,627	158,660	119,855	107,184	112,965	89,107	76,800	94,507	31,480	485,260	651,820	595,080	474,680
Variance	72,493	0	0	0	0	0	-43,200	52,693	63,000	0	0	0	0
Grand Total													
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

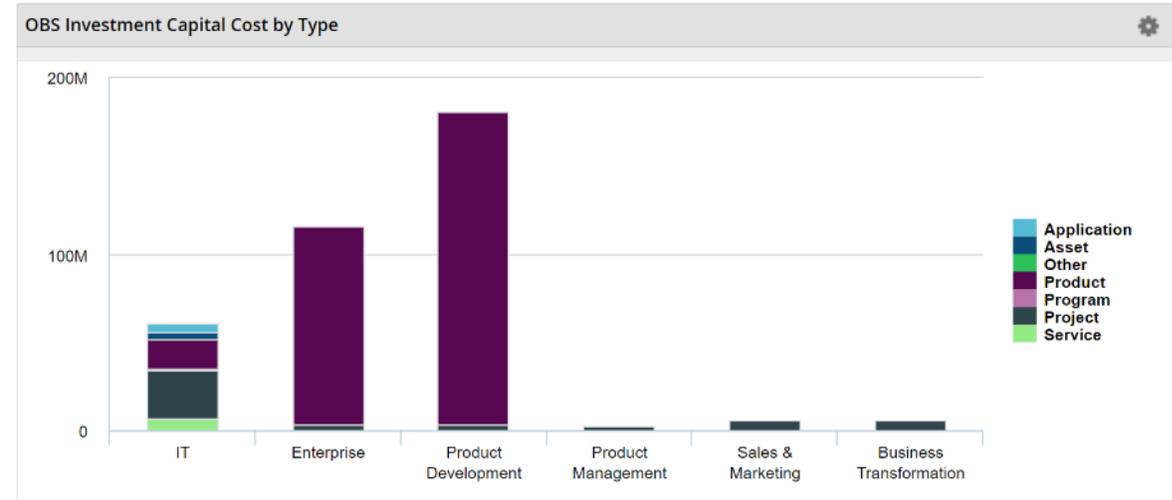
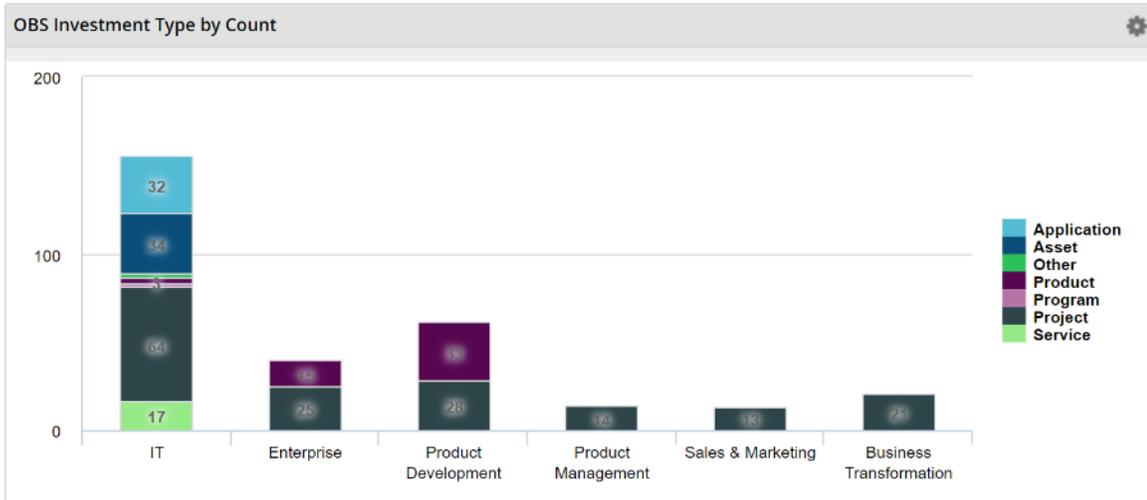
Select OBS By **OBS Type** OBS Unit (or) OBS Type **Corporate Department OBS**



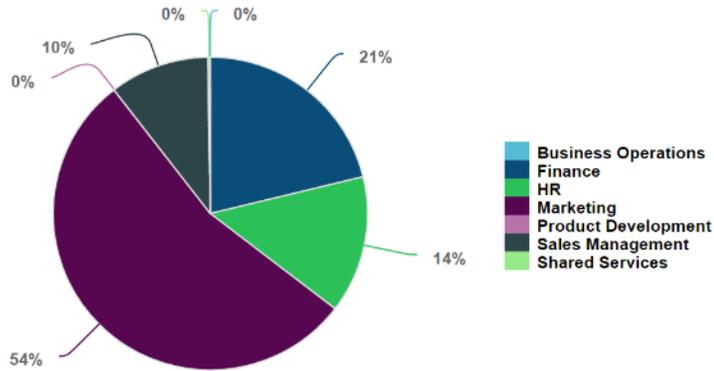
OBS Project Summary

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	⬆️	⚠️

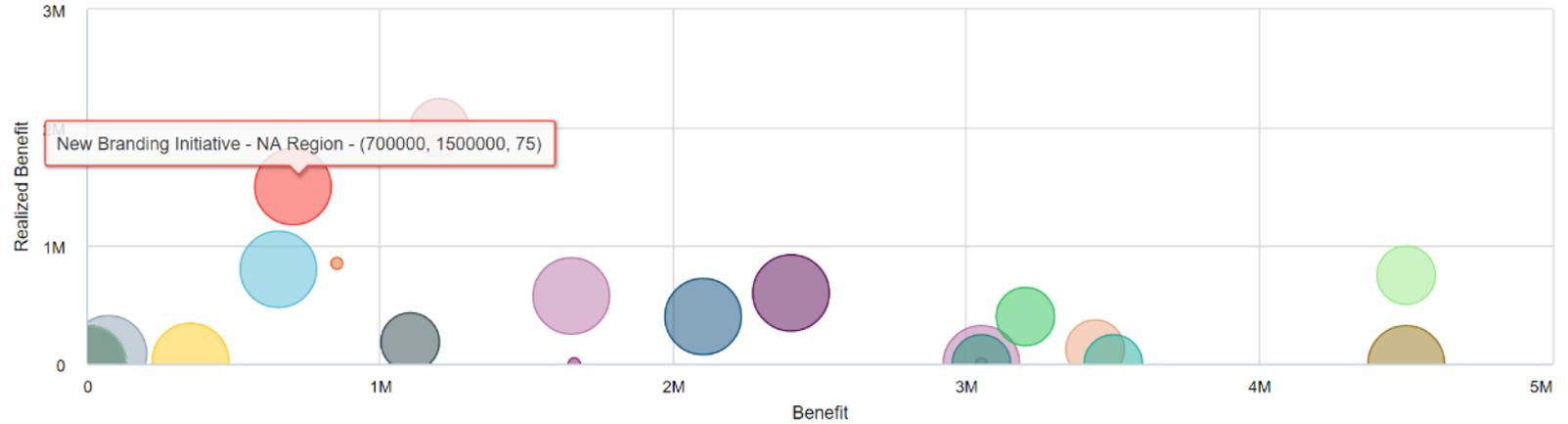
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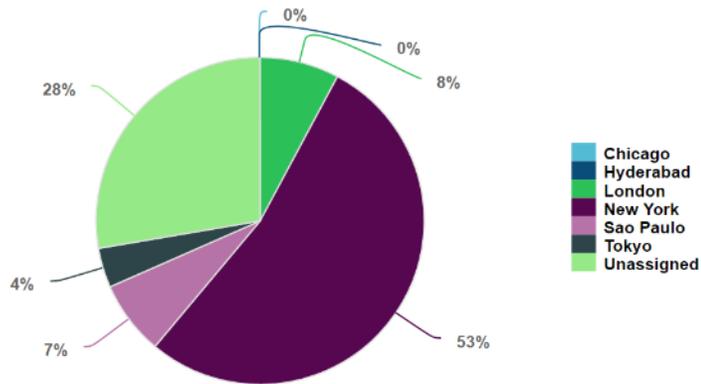
Realized Benefit by Business Unit



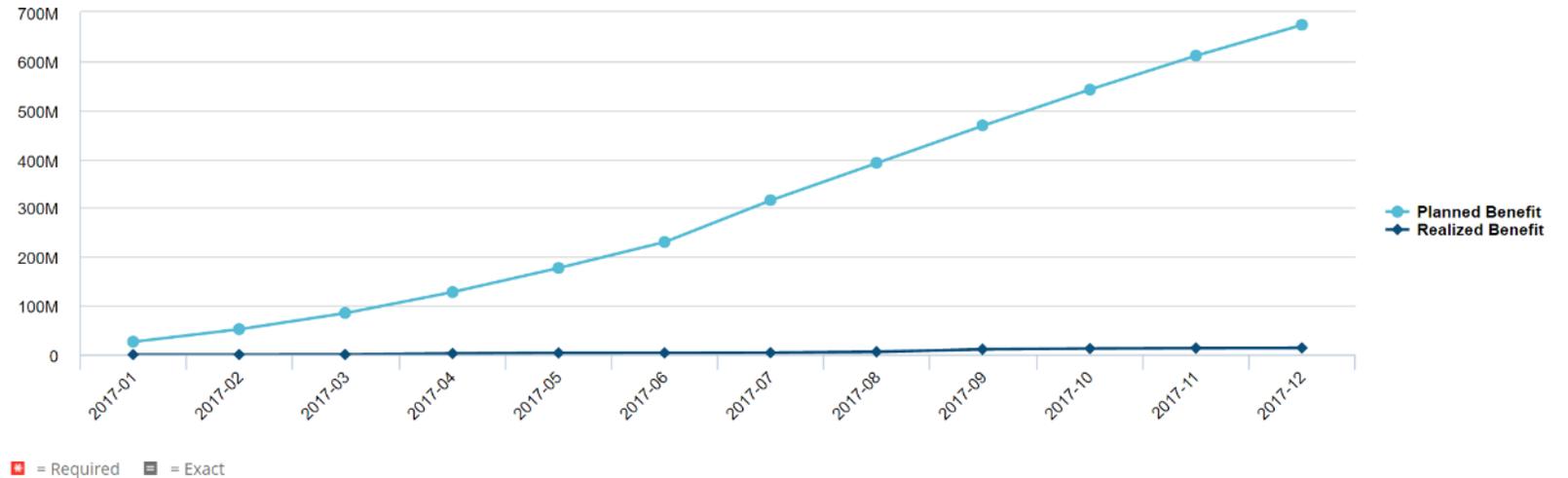
Benefit Analysis



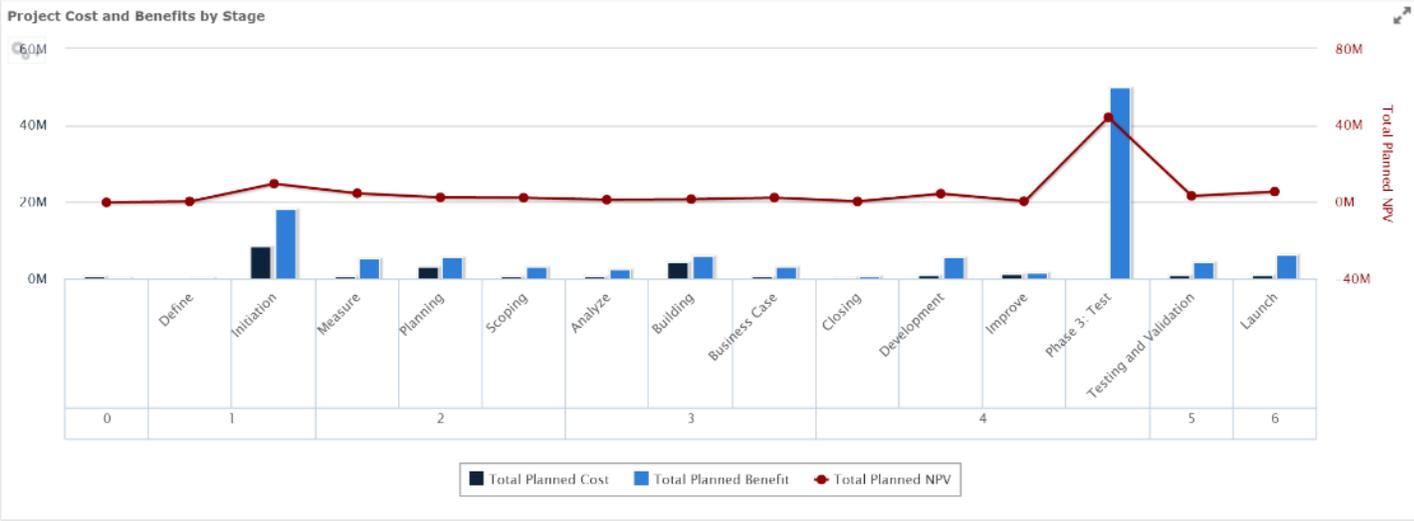
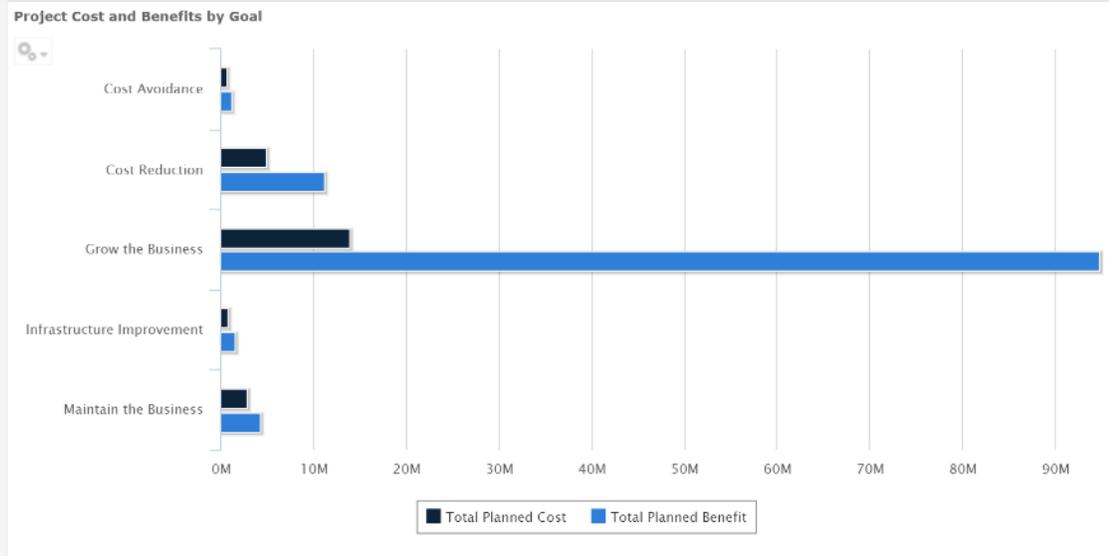
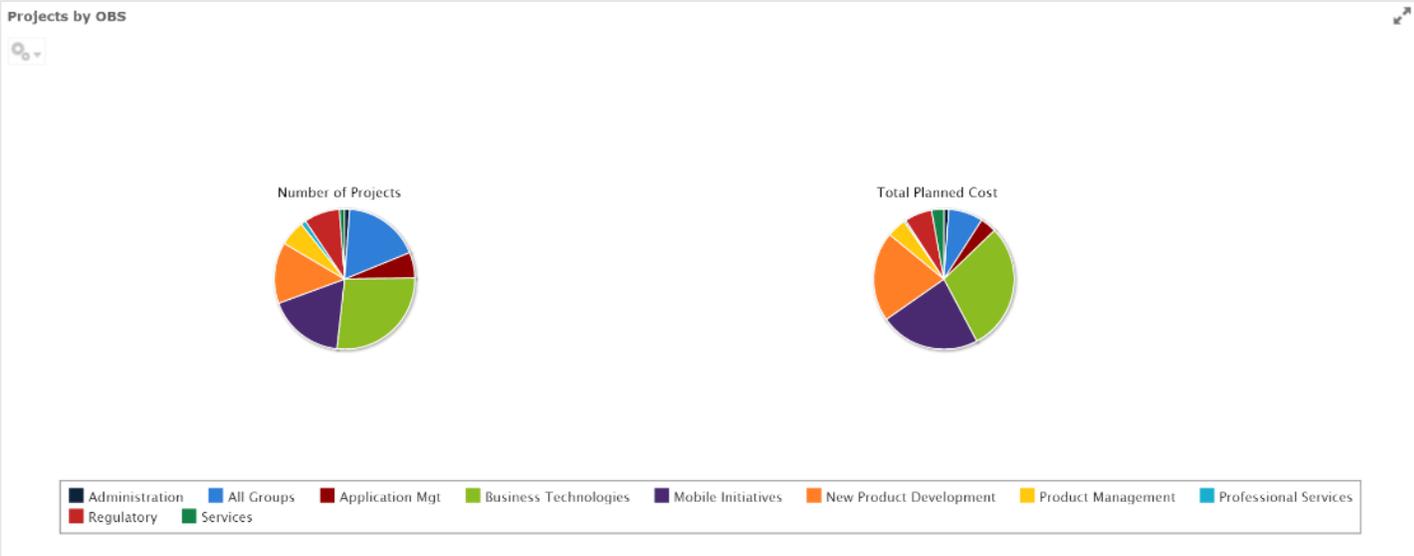
Realized Benefit by Location



+ Savings Analysis



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
Cost Avoidance					
	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
	Cost Avoidance Totals	4		713,020.00	1,175,000.00
Cost Reduction					
	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

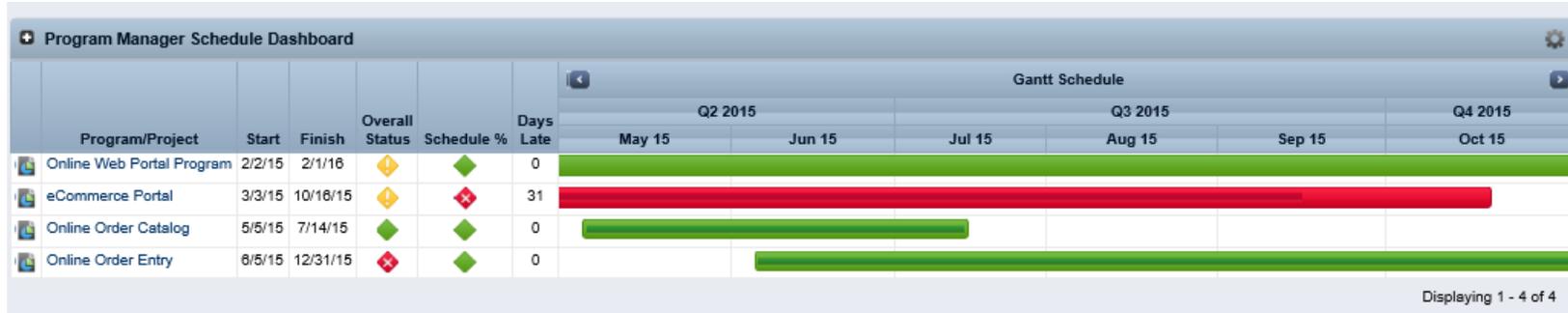
OOTB Metrics – Project/Program - Schedule

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							

OOTB Metrics – Project/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	🟢	Building	10/16/15	42.85%	11.12%	397,400	43,000	370,601	(26,799)	🟢	🔍
Online Order Catalog	⚠	Planning	7/14/15	41.22%	38.56%	246,650	0	246,650	0	🟢	🔍
Online Order Entry	🔴	Initiation	12/31/15	38.29%	67.57%	325,500	0	325,500	0	🟢	🔍
Project				40.79%	38.42%	969,550	43,000	942,751	(26,799)		
Program								990,000			
Variance								47,249			

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🔴 = Required

Program: Online Web Portal Program - Dashboard

Cost and Schedule Overview

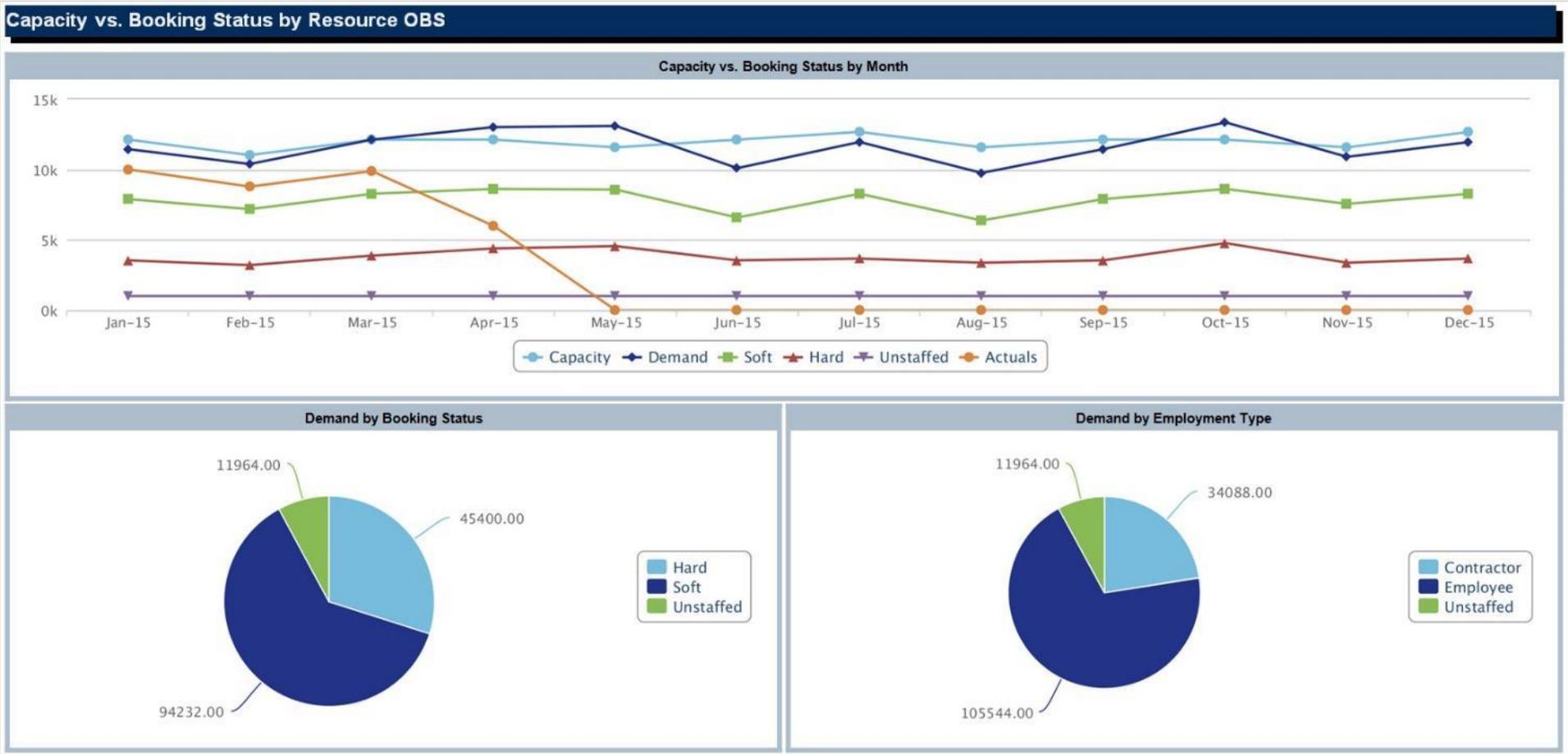
Project	BAC Cost	Actual Cost (ACWP)	EAC Cost	Projected Cost Variance	Projected Cost Variance %	Start	Finish	Baseline Finish	Schedule %	Days Late	Risk	High Priority Risks	High Priority Issues	High Priority Changes
eCommerce Portal	397,400	43,000	370,601	(26,799)	🟢	3/3/15	10/16/15	9/15/15	🔴	31	🟡	1	1	
Online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

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		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

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	-658.38	263.60	2,601.90	2,959.76	3,105.58	3,529.75	3,490.80	24,059.32

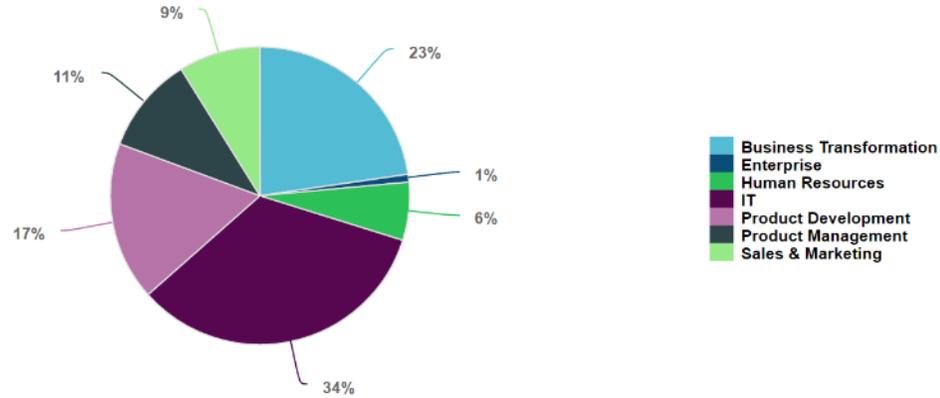
OOTB Metrics – Resource

Over/Under Allocation by Resource															
Resource	Primary Role	Remaining Capacity 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		
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	
Grand Total		25.60	-11.00	114.00	124.09	-438.39	-480.30	-479.68	-524.90	-331.60	-1.48	-93.01	63.40	-2,033.27	

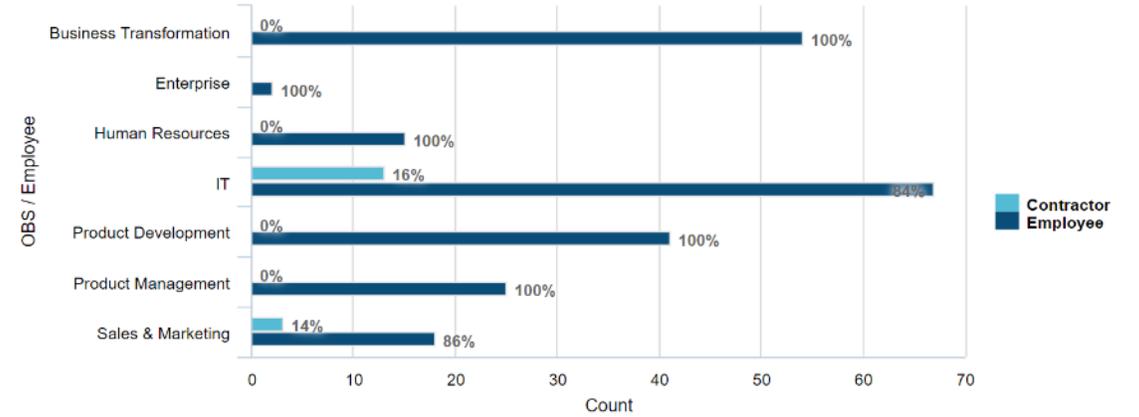
OOTB Metrics – Resource

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

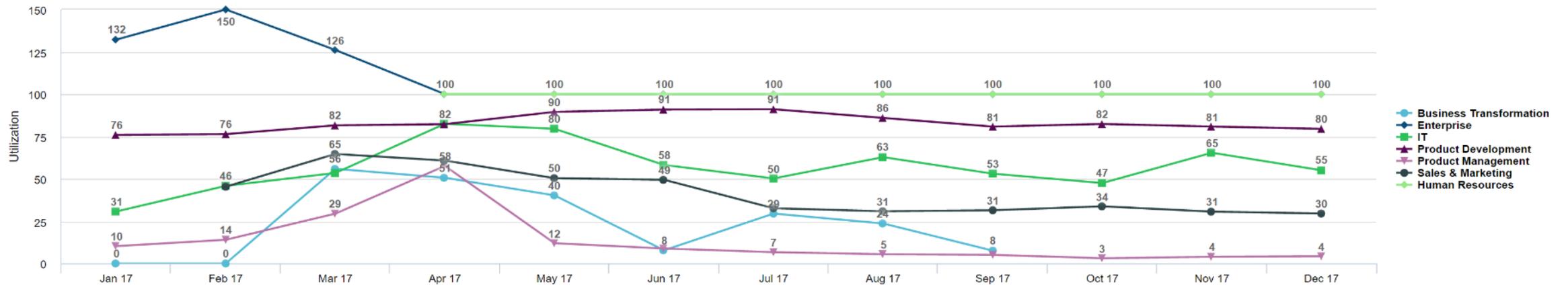
OBS Headcount Analysis



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 (Yellow)

Health Factors:

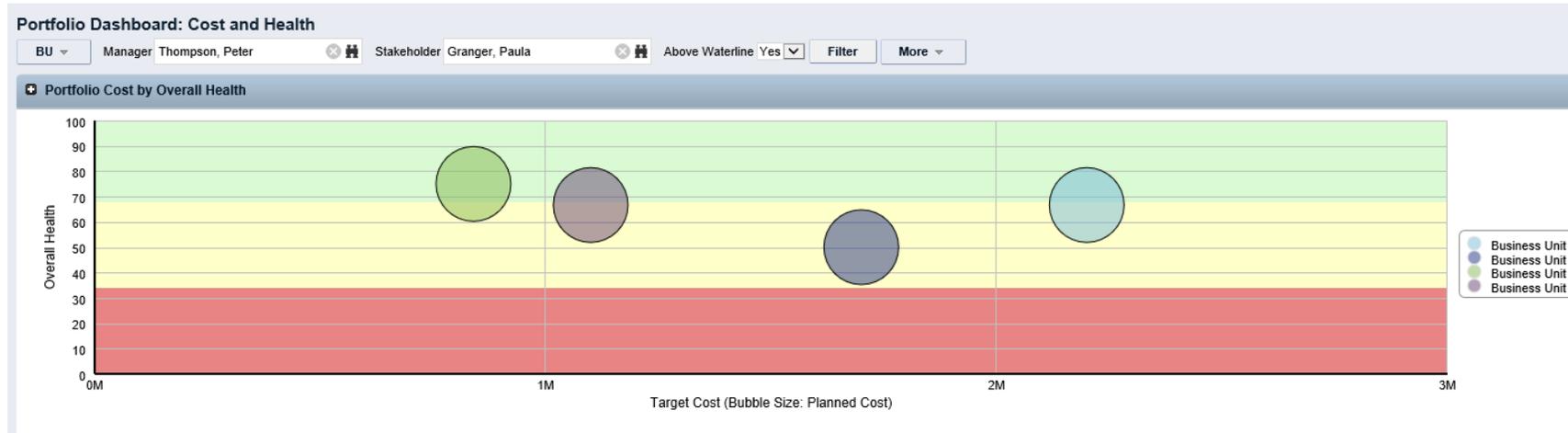
- Cost Health: Yellow
- Resource Health: Red
- Schedule Health: Yellow

Measures:

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

Buttons: Save, Save And Return, Return

Currency = USD WorkEffort = FTE



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
Total	1,240,000	544,600	695,400	259,660	70,660	189,000	899,137	515,980	383,157	340,863	28,620	312,243

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

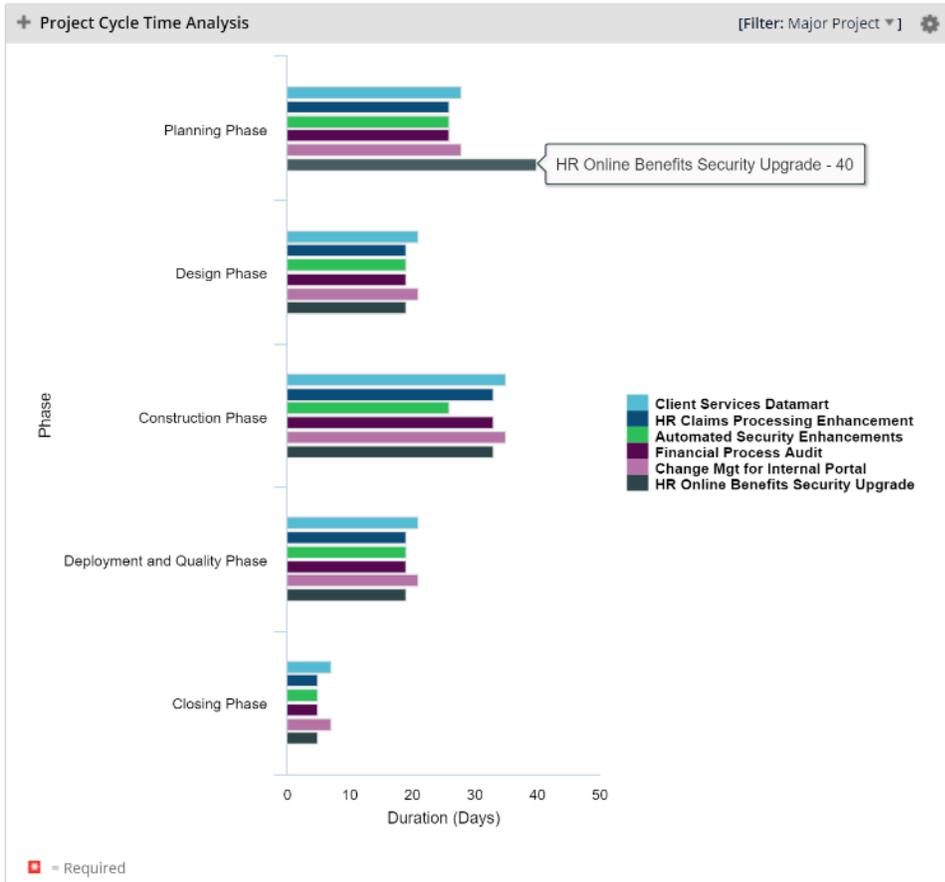
Manager | Stakeholder | Filter

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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+ 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)	◆
Total					35.00	80.00	80.00	0.00	35.00	

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

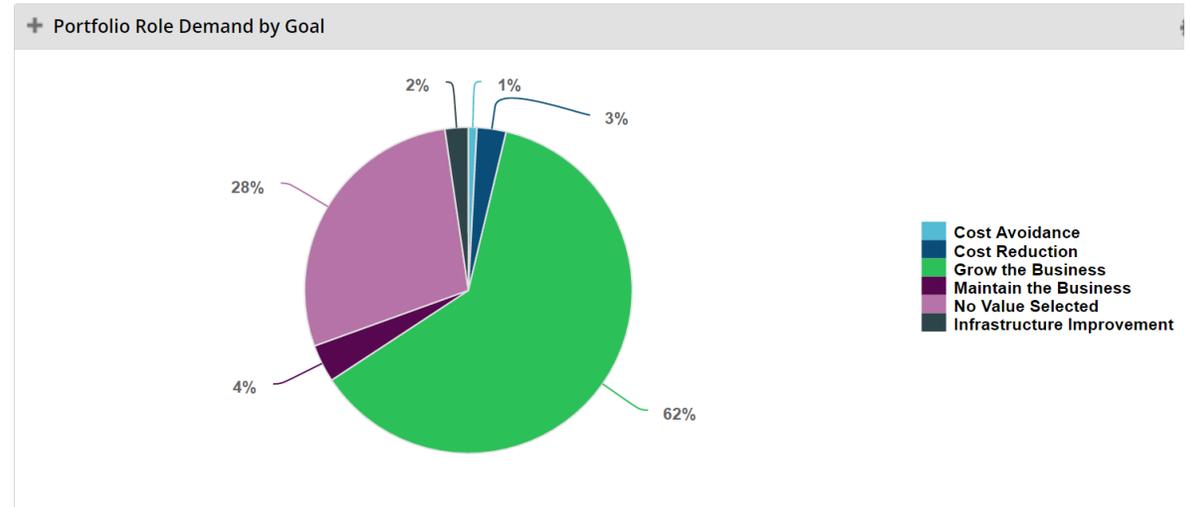
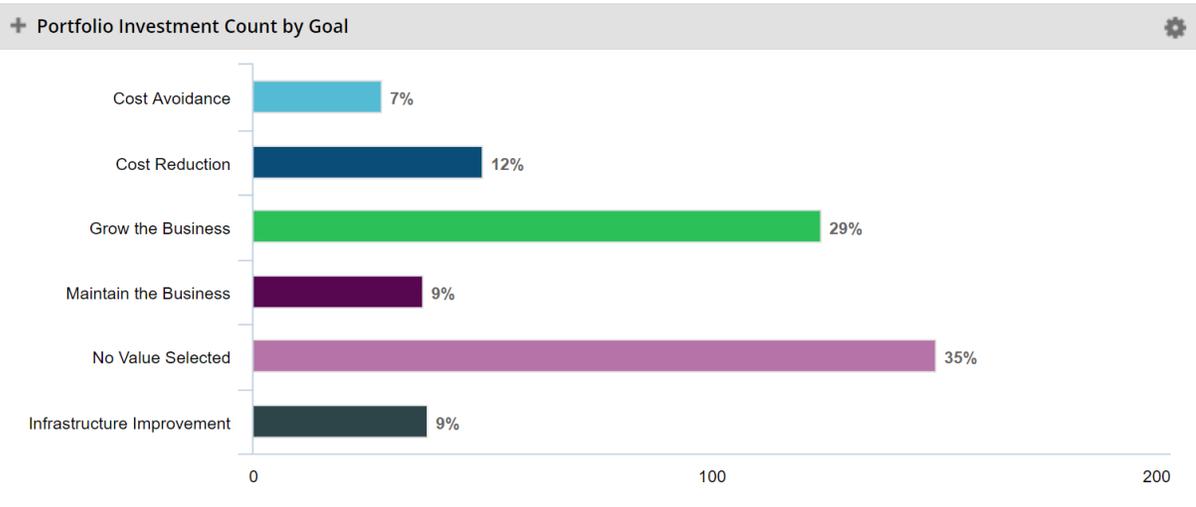
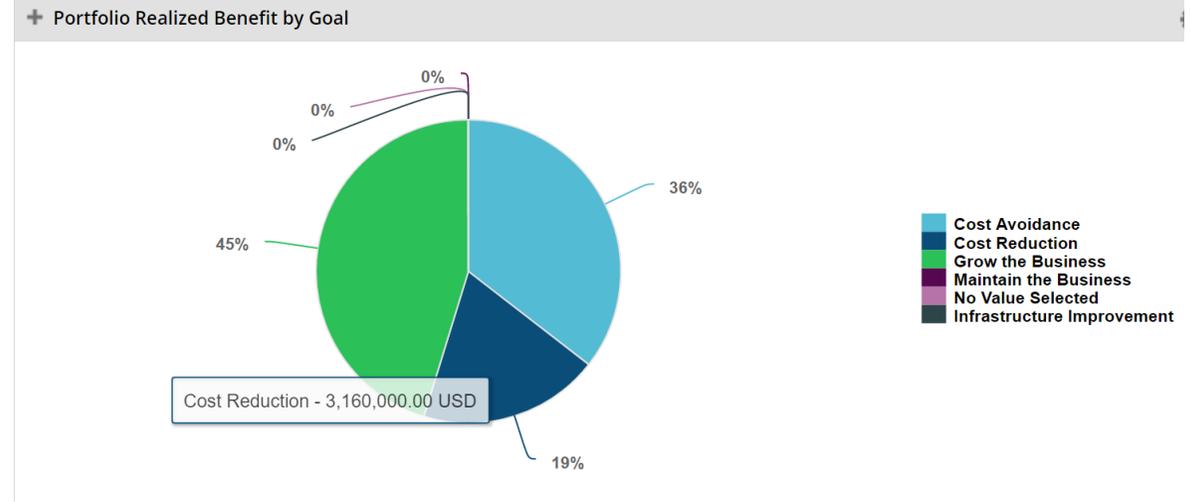
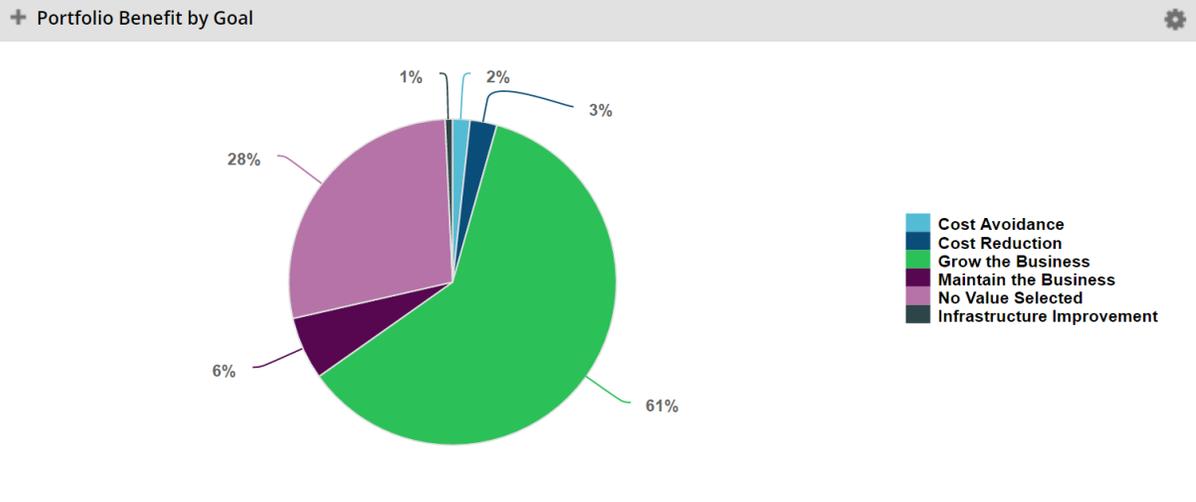
+ Process Bottlenecks

[Filter: Issue Review and Escalation]

Process	Instance	Flow Diagram	Initiated By	Verify & Determine Root Cause	Duration and Reviewers	PMO Issue Escalation	Resubmit Issue	Business Owner Signoff
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)	

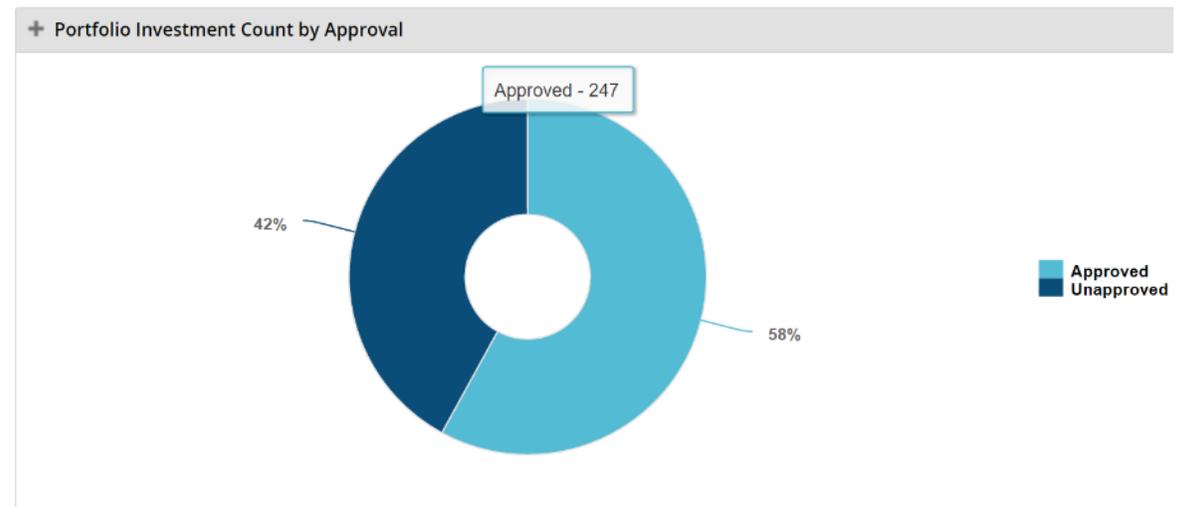
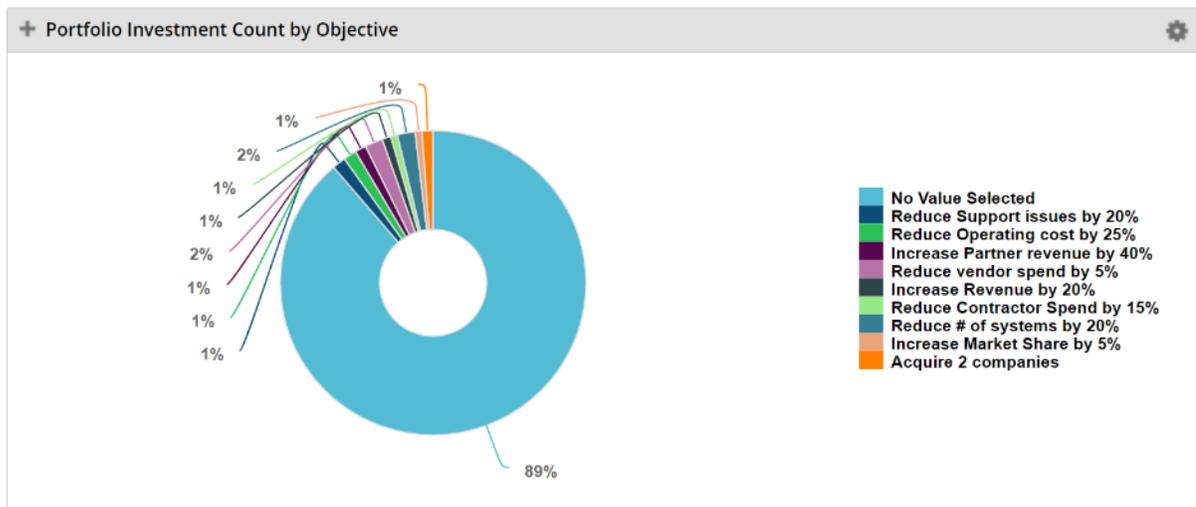
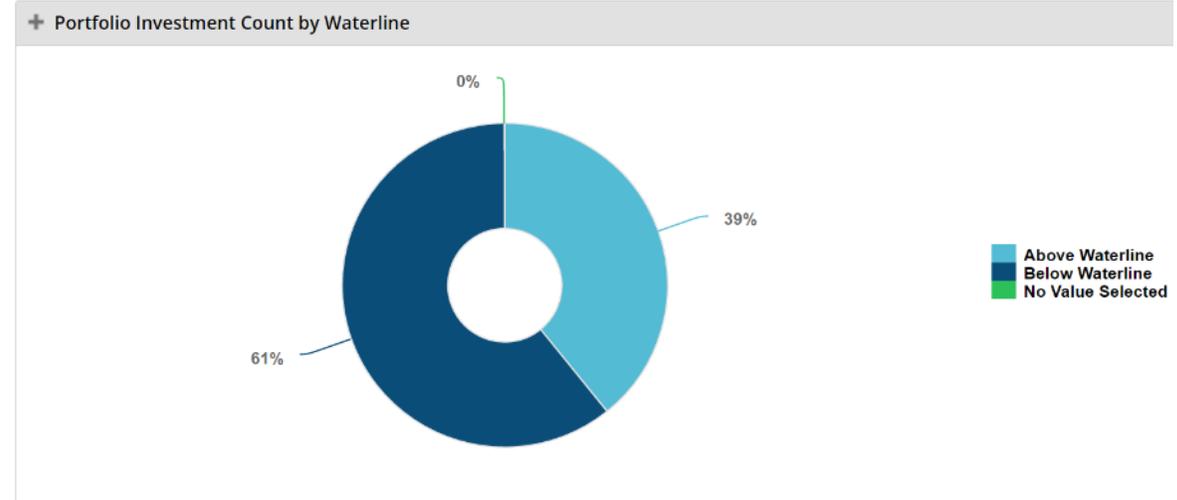
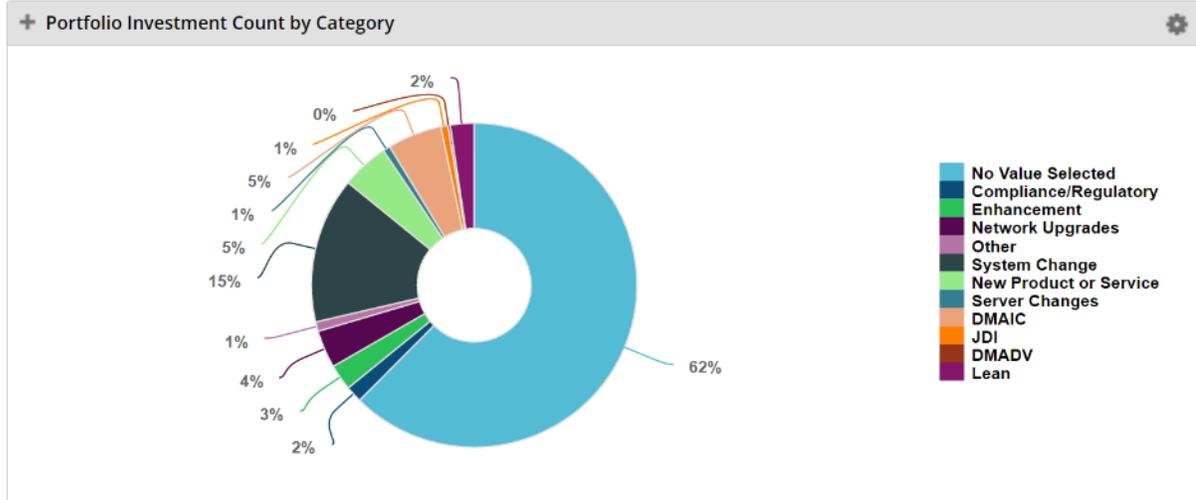
OOTB Metrics – Portfolio

Filter: None Portfolio Manager Stakeholder Above Waterline All Filter More



OOTB Metrics – Portfolio

Filter: None Portfolio Manager Stakeholder Above Waterline All Filter More





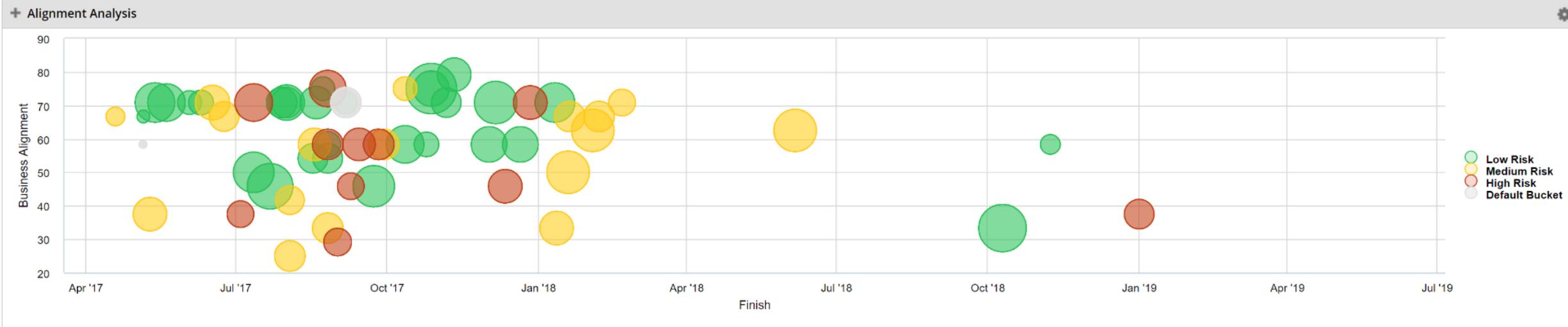
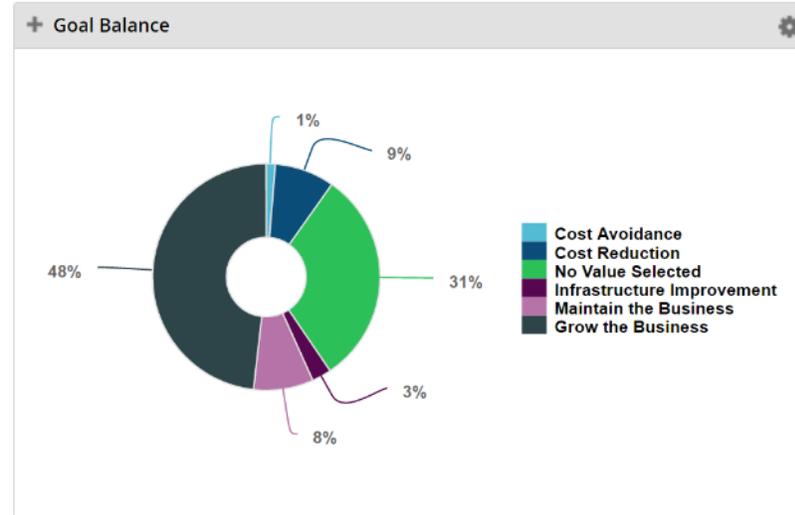
+ Annual Planning

[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

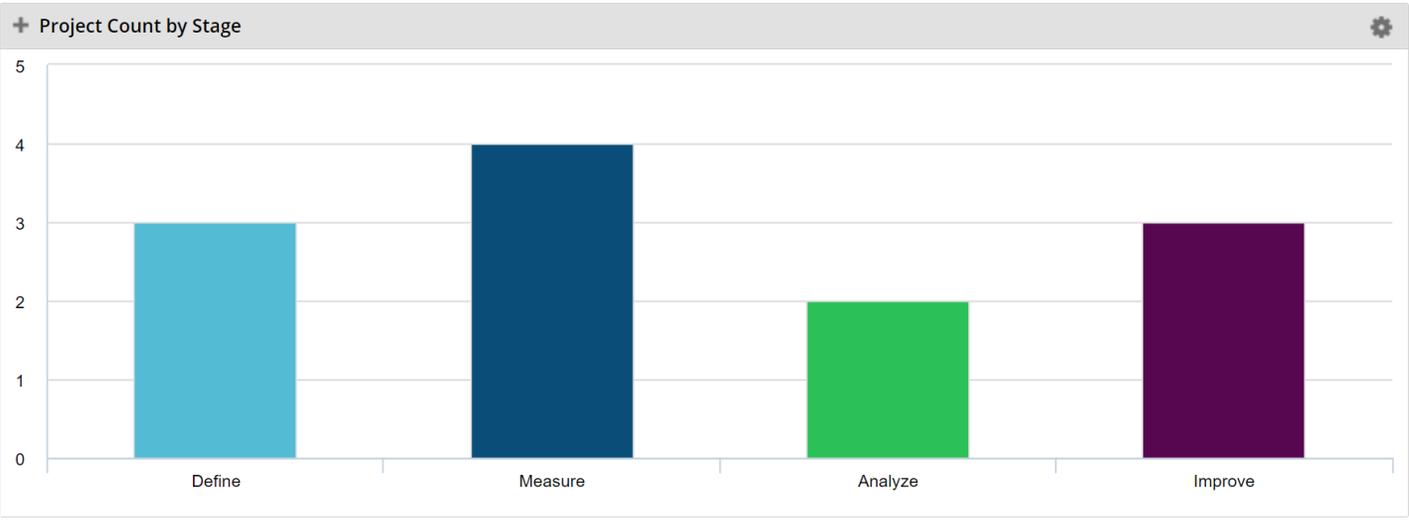
Save



OOTB Metrics – Portfolio

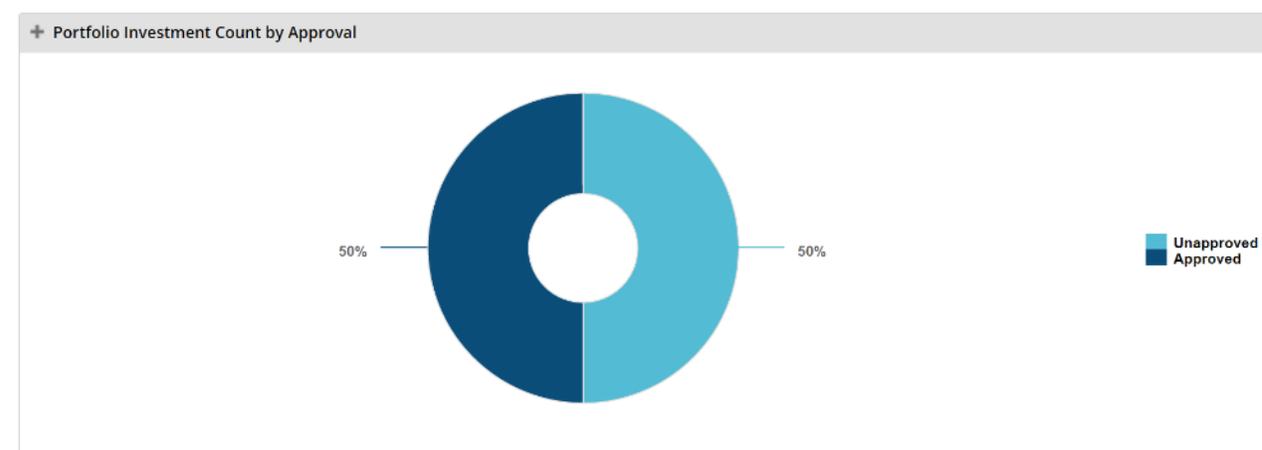
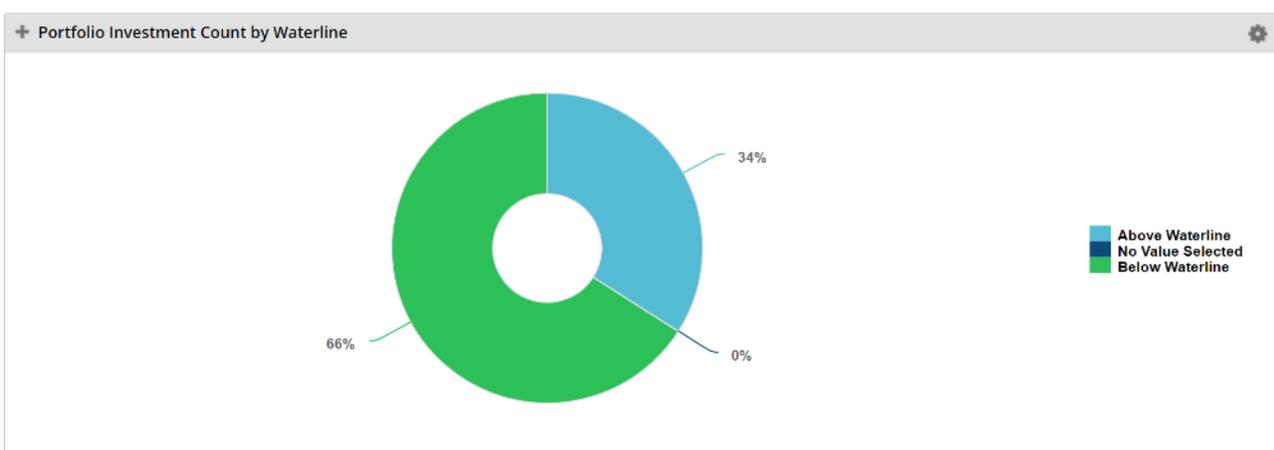
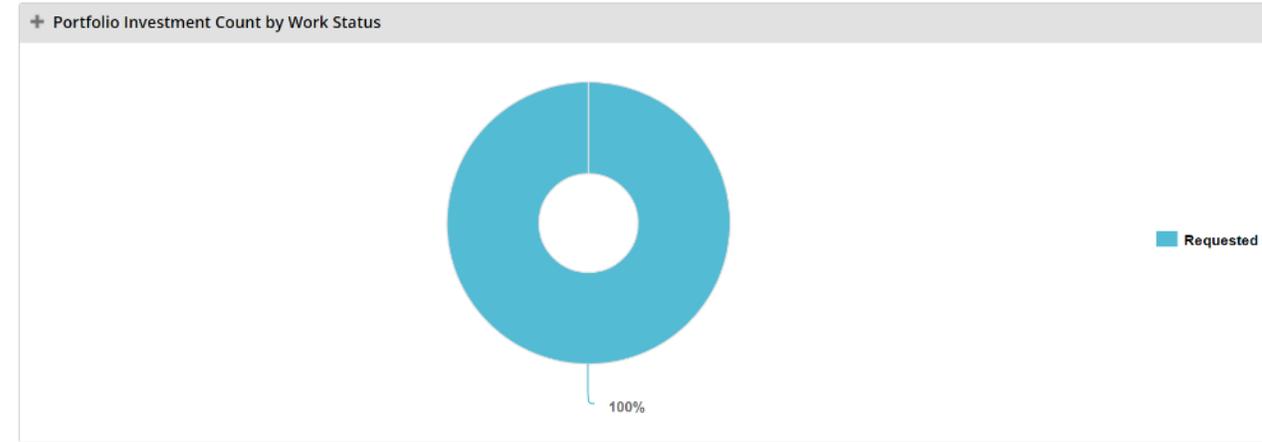
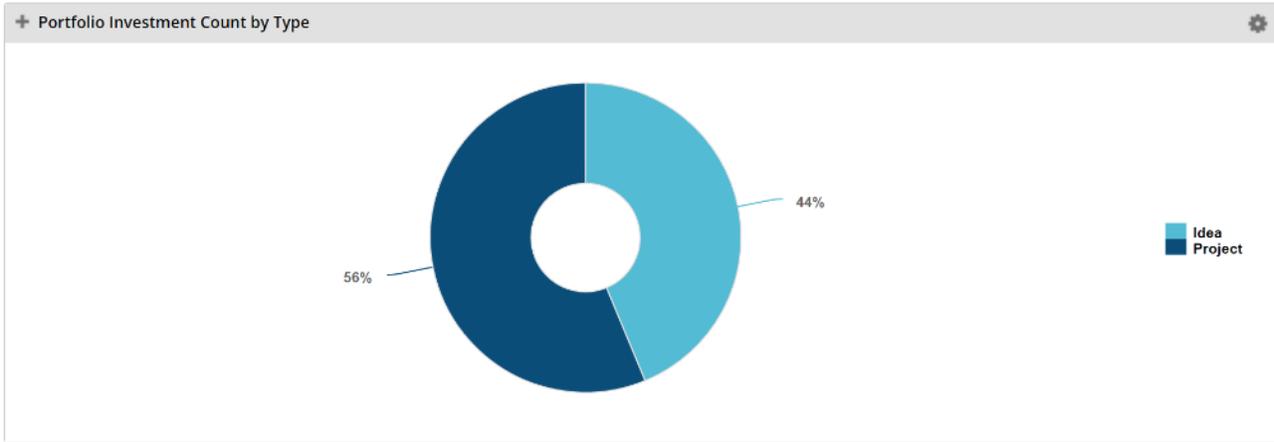
+ At Risk Projects							Gantt Schedule					
Project / WBS	Start	Finish	Overall Status	Schedule %	Days Late							
						May 16	Jun 16	Jul 16	Aug 16	Sep 16	Oct 16	
+ Maintain legacy purchasing system	5/21/16	9/22/17	◆	◆	77	[Red bar spanning May 16 to Sep 16]						
+ Modernize customer service portal	6/4/16	7/21/17	◆	◆	112	[Red bar spanning Jun 16 to Sep 16]						
+ Personalized online shopping experience	6/4/16	12/20/17	◆	◆	264	[Red bar spanning Jun 16 to Oct 16]						
+ Web Application Enhancement	3/26/17	12/31/18	◆	◆	522	[Red bar spanning Jul 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
Total	112	3,230,000	38,178,000	93,931,000	243,149,000



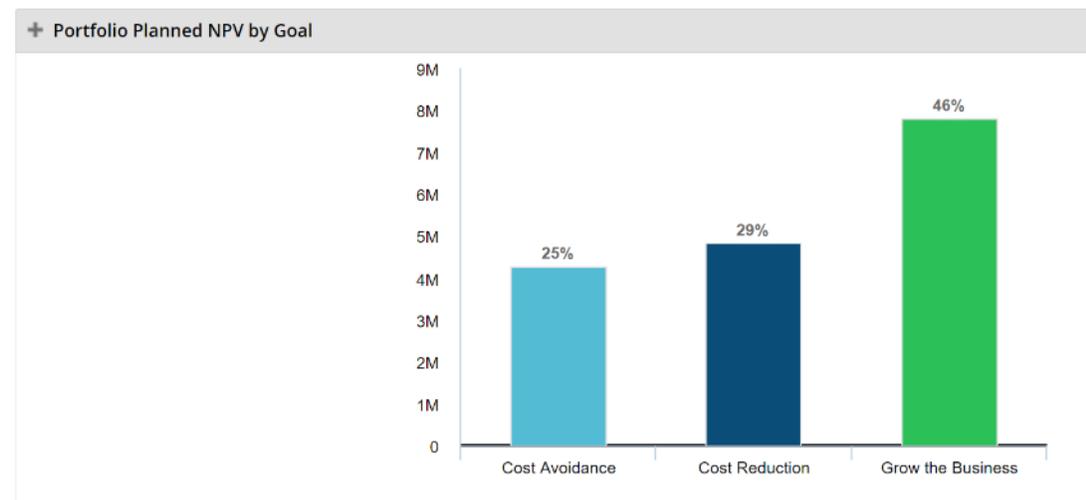
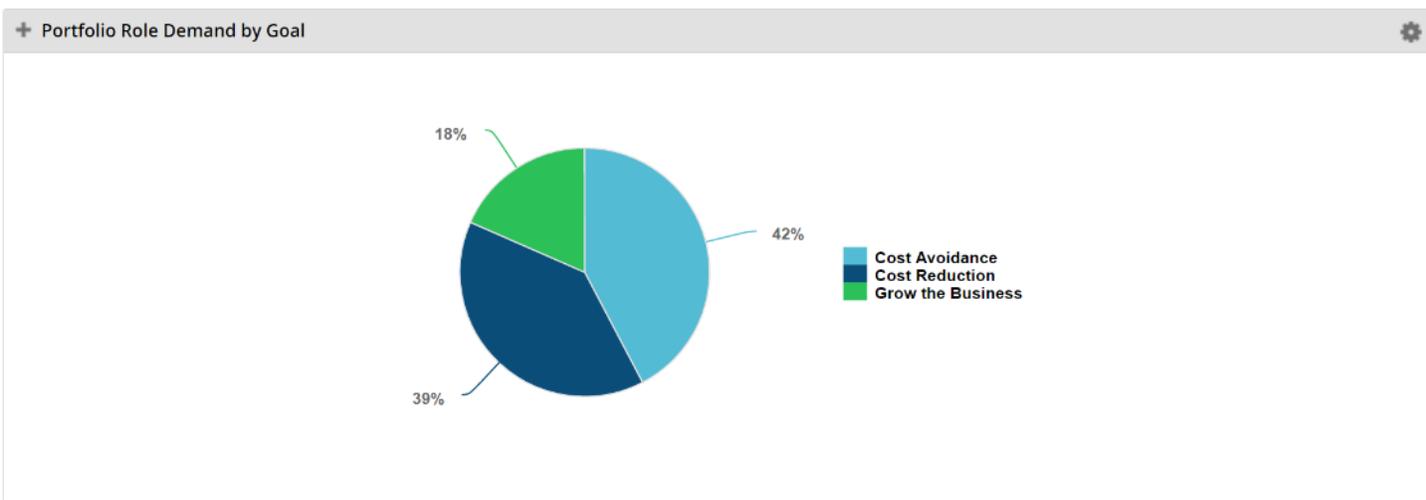
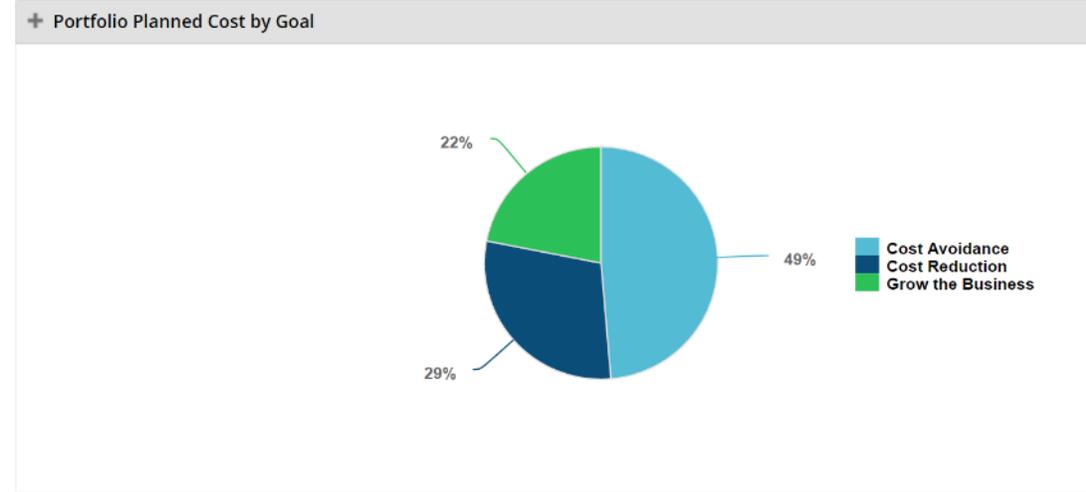
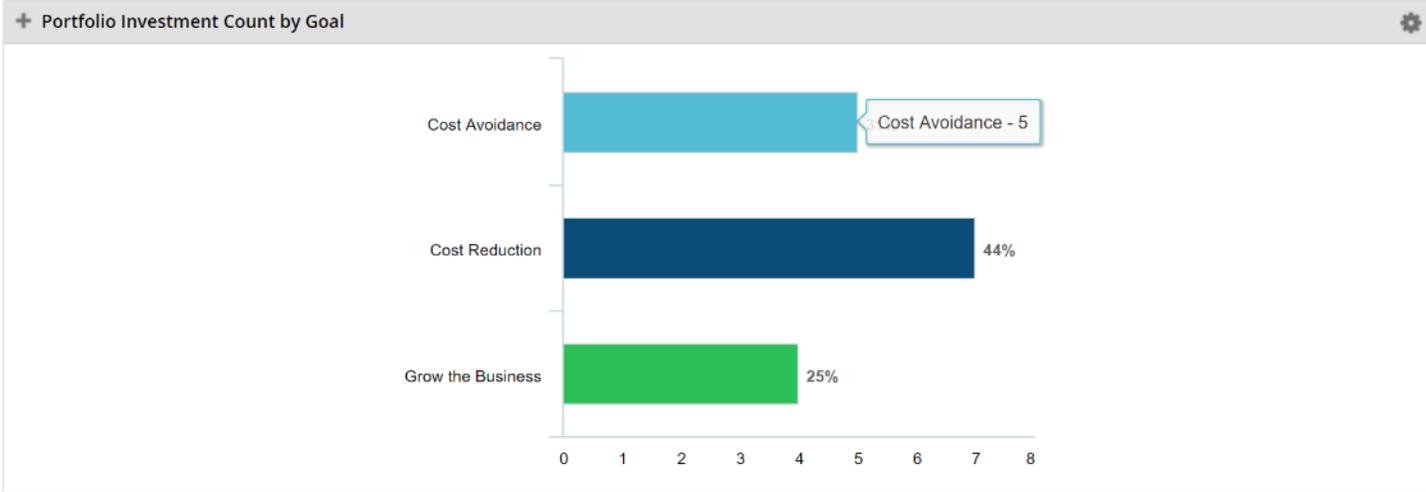
OOTB Metrics – Portfolio

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
Total									40.00	0.00	40.00

Displaying 1 - 2 of 2