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SAN DIEGO

How to Design Professional-Looking Reports

Your Guides: Rob Greca and Wes McCoubrie

Agenda

- Introduction
- Design Principles
- Examples
- Other Great Resources

Introductions

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



The Presentation Layer

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Before...

Project Risk Register

| Risk ID | Created Date | Risk Name | Response Strategy | Impact Area | Likelihood | Score | Category | Status |
|-------------------------------------------------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-------------|--------------------|-------------------|---------------------------------------|--------------------|
| Owner | | Description | Trigger | | Impact | Threat/Opp | Priority | Creator |
| Migration Status | | Comments | Risk Response | | Updated By | Date Last Updated | Closed By | Date Closed |
| About Me: Pictorial Based Medical Family History Collection | | | | | | | PRJ007356 | |
| RSK003671 | 6/26/2018 | Test Risk | Enhance | Cost | Low | 1 | Project Management/Change Management | Draft |
| Administrator, PPM | | Description Testing Risk Section. Testing Risk SectionTesting Risk Section Testing Risk SectionTesting Risk Section | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Low | | Medium | Administrator, PPM |
| Yellow | | | Risk Response Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Geise, Kraig A. | 7/18/2018 | | |
| | | | | | | | | |
| RSK003675 | 6/26/2018 | Test Risk 2 | Mitigate | Cost | Low | 1 | Regulatory/Procurement/Contracts | Closed |
| Administrator, PPM | | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Low | | High | Administrator, PPM |
| Green | | | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Geise, Kraig A. | 7/18/2018 | Geise, Kraig A. | 7/18/2018 |
| | | | | | | | | |
| RSK003678 | 6/26/2018 | Test Risk 3 | | Cost | High | 9 | Communication | Open |
| Smith, John | | testing | | | High | | Critical | Smith, John |
| | | | | | Administrator, PPM | 6/26/2018 | | |
| | | | | | | | | |
| RSK003680 | 6/26/2018 | Test Risk 4 | | Business | Low | 1 | Approvals/Organization/Prioritization | Open |
| Smith, John | | | | | Low | | Low | Smith, John |
| | | | | | Administrator, PPM | 6/26/2018 | | |

Date: 10/25/2018

Page 1 of 182

Project Risk Register Report

Report run on: 9/17/18

Accelerated Mobile Pages (AMP)

PRJ010742

Risk Name Impact of ITP 2.0 to AMP expansion

Description There is a risk that Apple's Intelligent Tracking Previsions (ITP) 2.0 will delay or prevent us from expanding the use of AMP pages

Threat/Opp Threat

Impact Area Business

Likelihood Medium

Impact High

Score 6

Response Strategy Mitigate

Risk ID RSK00000528

Impact Area Business

Owner Smith, John

Target Resolution 02/15/2017

Category Resources/Team/Training

Status Open

Priority Medium

Risk Response Based on analysis by vendor and approved 10/12/2016 by sponsor the likelihood of the data being useful is present but as we have utilized existing available retroactive data resources to make positive changes the depth of contribution of retroactive is not felt to be considerable. It will also reduce the technical resources and by using non-traditional it will not impact other existing projects.

Trigger Unknown data would be needed to validate the output. If this occurs, the pilot would be closed.

Comments Additional justification was supplied to approving areas, and technical resources were identified that would not impact other on-going high strategic projects. Consequently there will be no change to scope but there will be a slight shift in schedule.

Creator Smith, John

Created Date 01/16/2017

Updated By Smith, John

Date Last Updated 01/16/2017

Closed By Smith, John

Date Closed 01/16/2017

Risk Name Amazon Alexa Proof of Concept

Description Due to longer than anticipated approvals the project could not begin as originally scheduled

Threat/Opp Threat

Impact Area Schedule

Likelihood High

Impact High

Score 9

Response Strategy Mitigate

Risk ID RSK00000528

Impact Area Business

Owner Smith, John

Target Resolution 02/15/2017

Category Resources/Team/Training

Status Open

Priority Medium

Risk Response Scope is considered of a higher weight for this project, and project leadership approved change to schedule extending project by three months but with scope remaining as originally requested.

Trigger

Comments

Creator Smith, John

Created Date 01/16/2017

Updated By Smith, John

Date Last Updated 01/16/2017

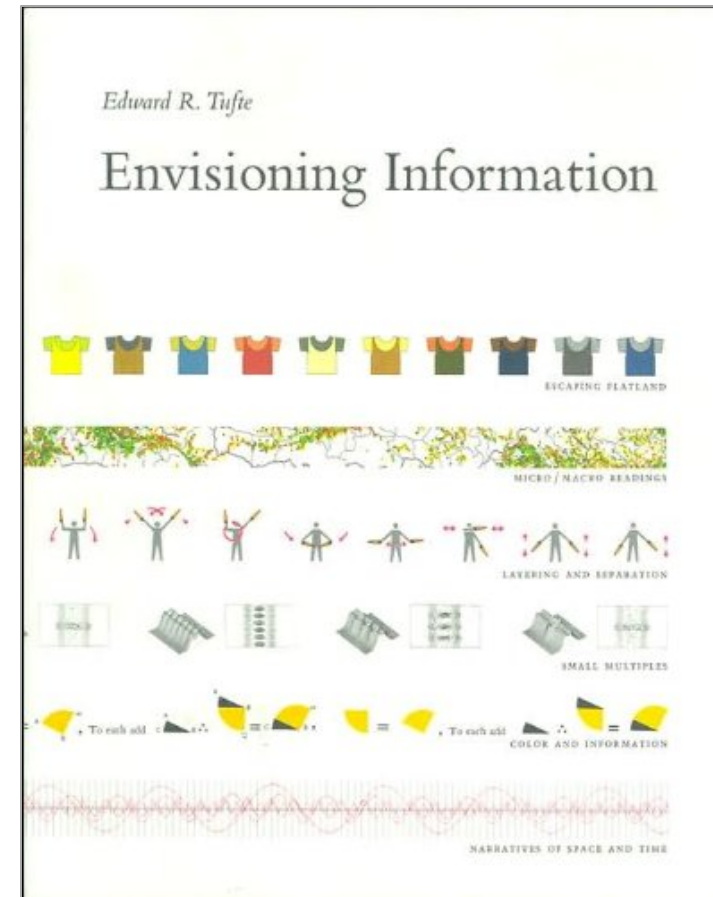
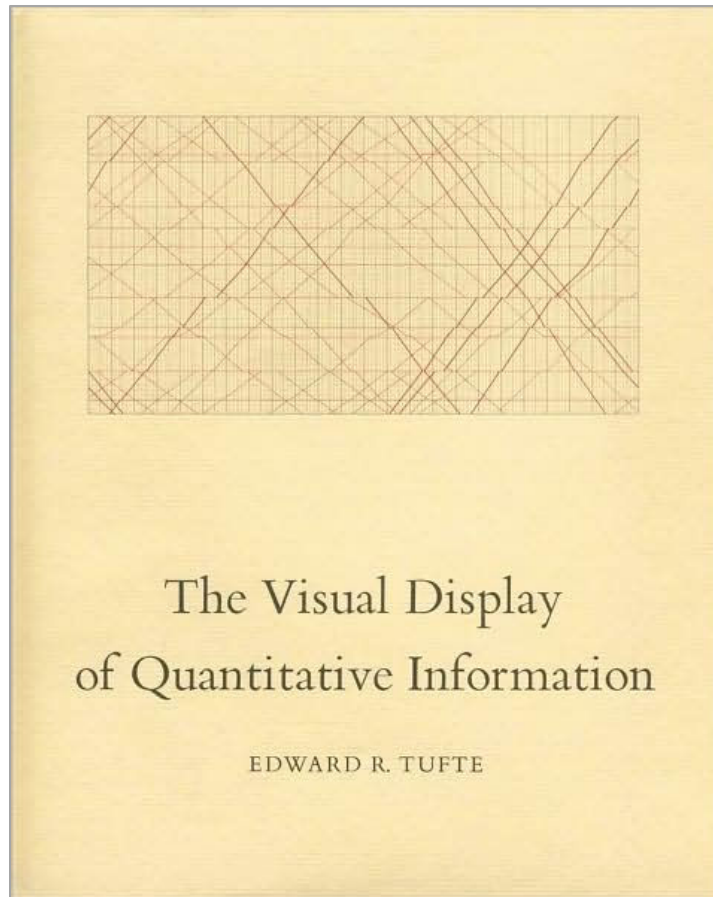
Closed By Smith, John

Date Closed 01/16/2017

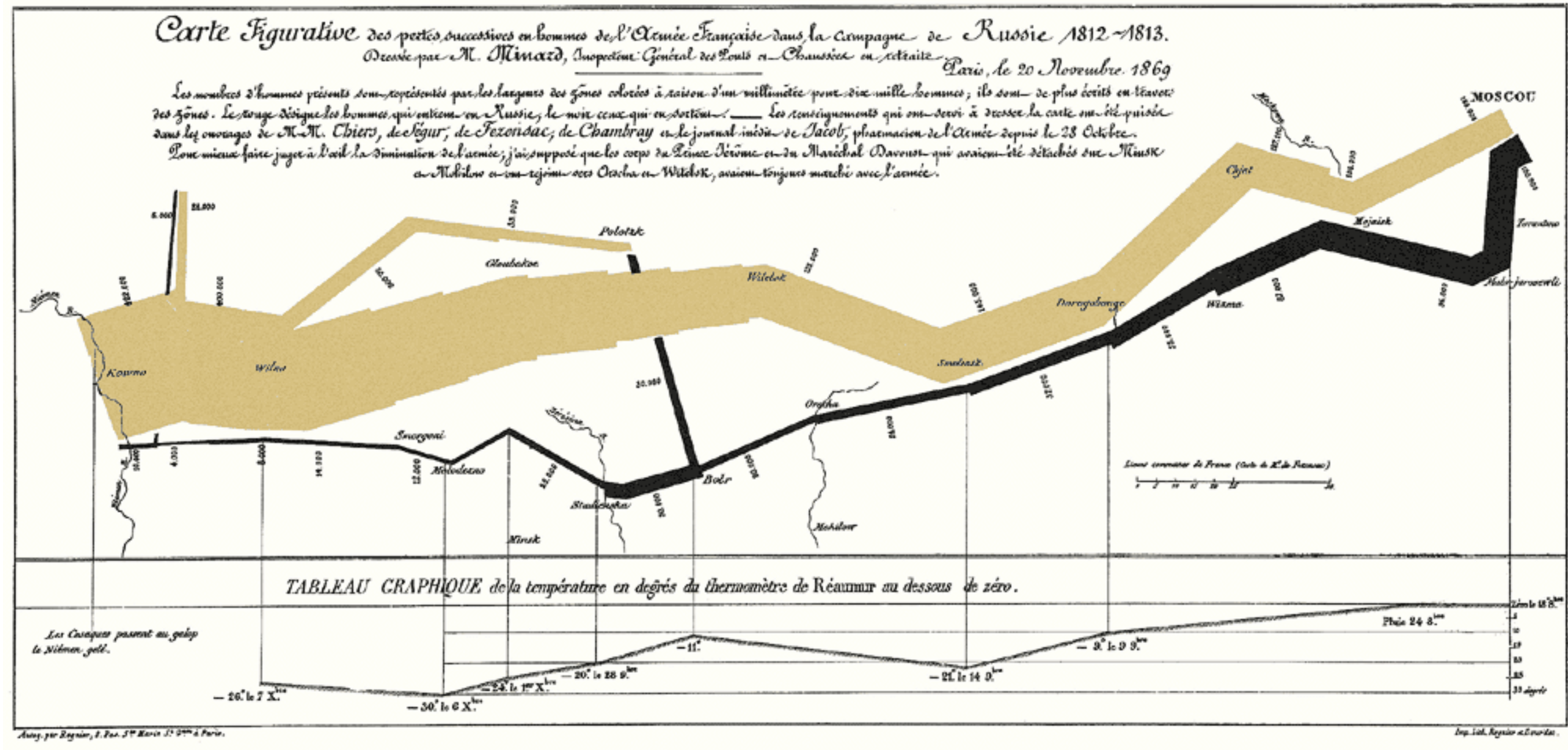
What Are We Trying To Achieve?

Visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance.

Edward Tufte



Napoleon's March



Dr. John Snow Plotting Cholera Deaths



The Power of Visual Perception

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Preattentive Processing

How many fives are in this list?

986454651234619784621345672134566117984627840924
065707057027907280320802900730250270237008374082
078720272007089247802602703793775709707377970661
462097094702780927979709456648013249013164802347

Preattentive Processing

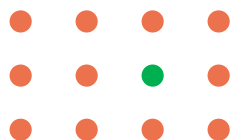
How many fives are in this list?

9864**5**46**5**123461978462134**5**672134**5**66117984627840924
06**5**7070**5**70279072803208029007302**5**0270237008374082
07872027200708924780260270379377**5**709707377970661
4620970947027809279797094**5**6648013249013164802347

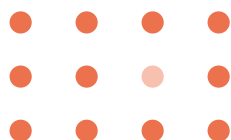
Preattentive Attributes

Color

Hue



Intensity



Position

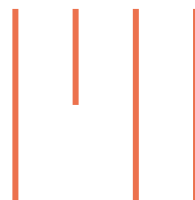


Form

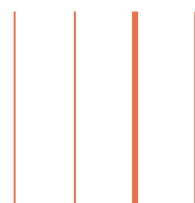
Orientation



Line length



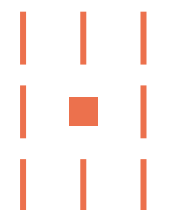
Line width



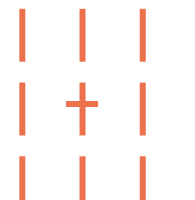
Size



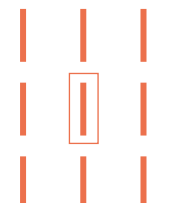
Shape



Added marks



Enclosure

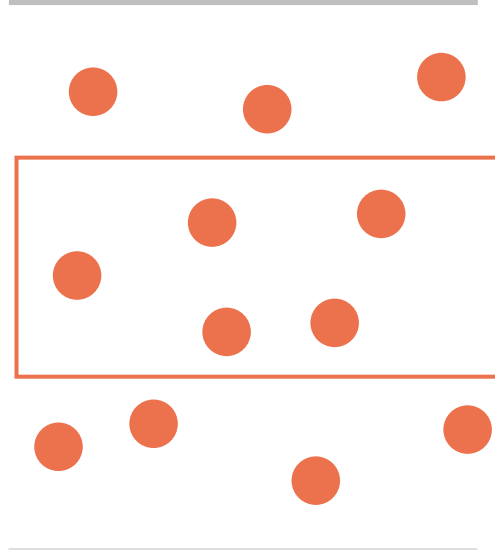


Gestalt Principles of Visual Perception

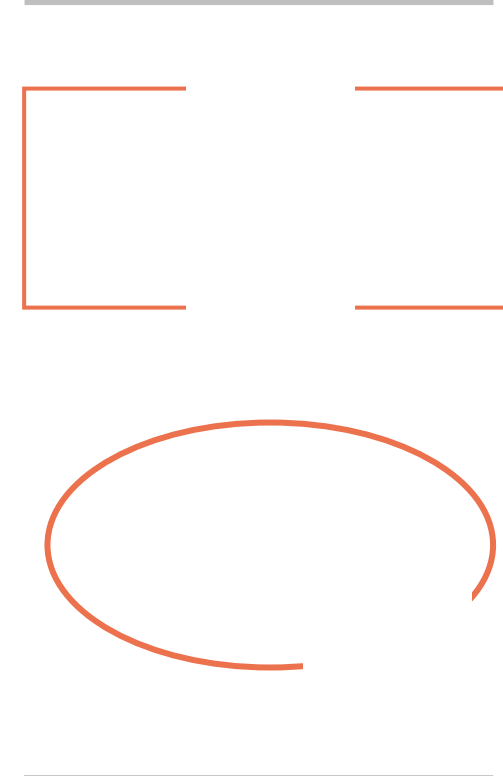
Proximity



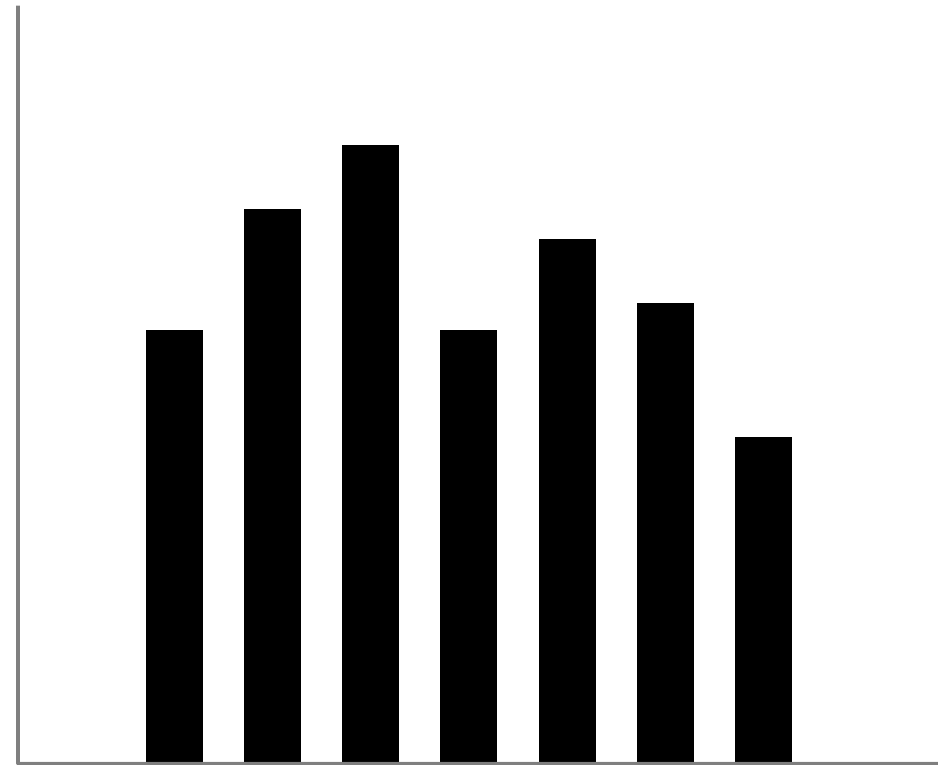
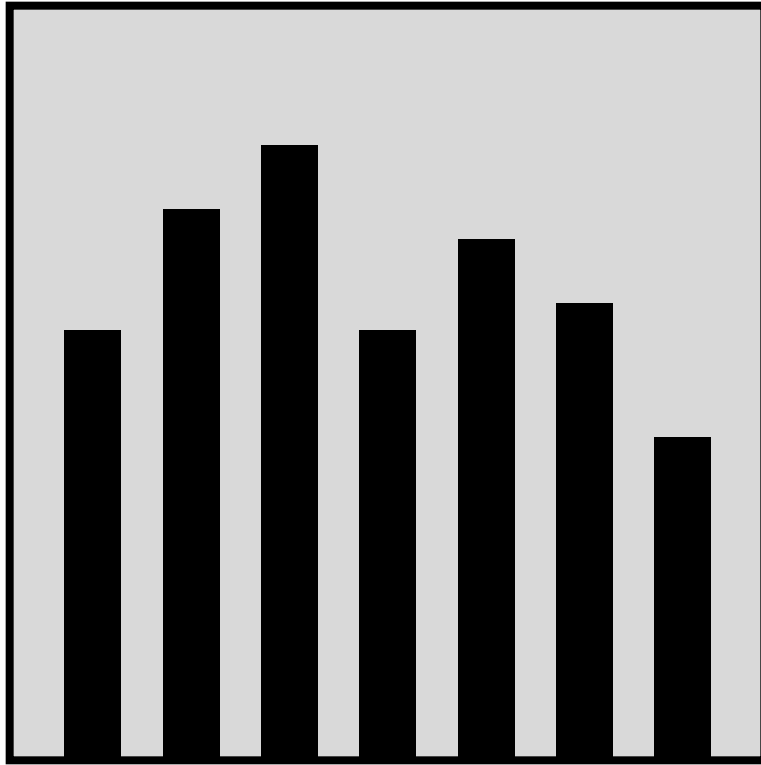
Enclosure



Closure

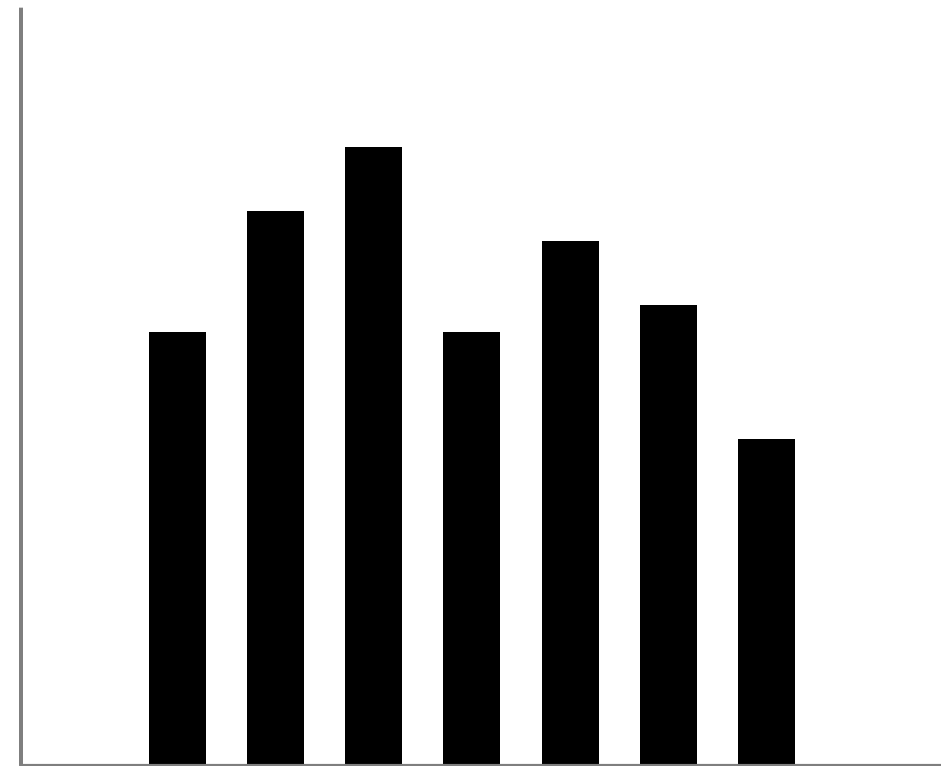
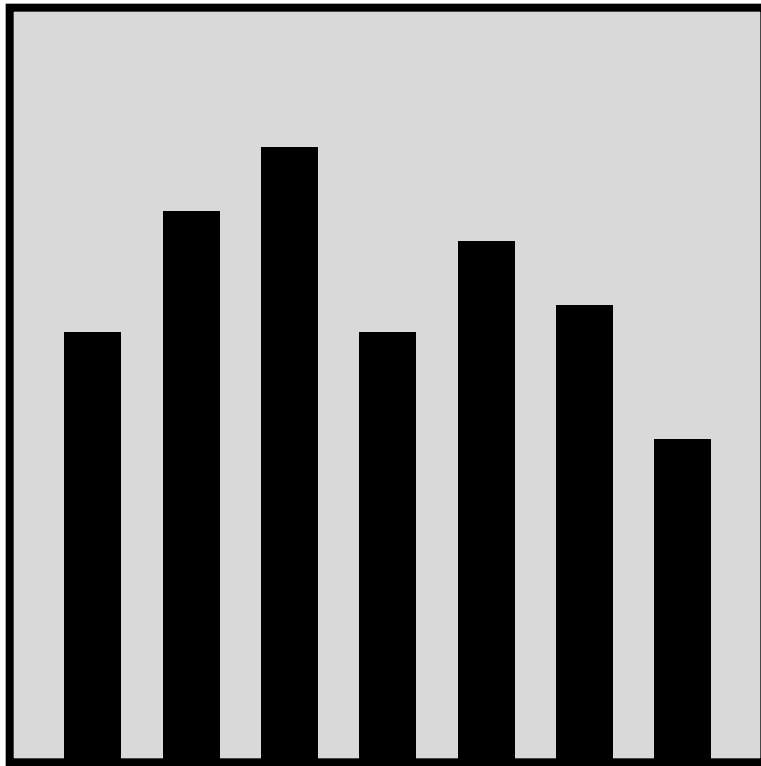


Example of “Closure” in Practice

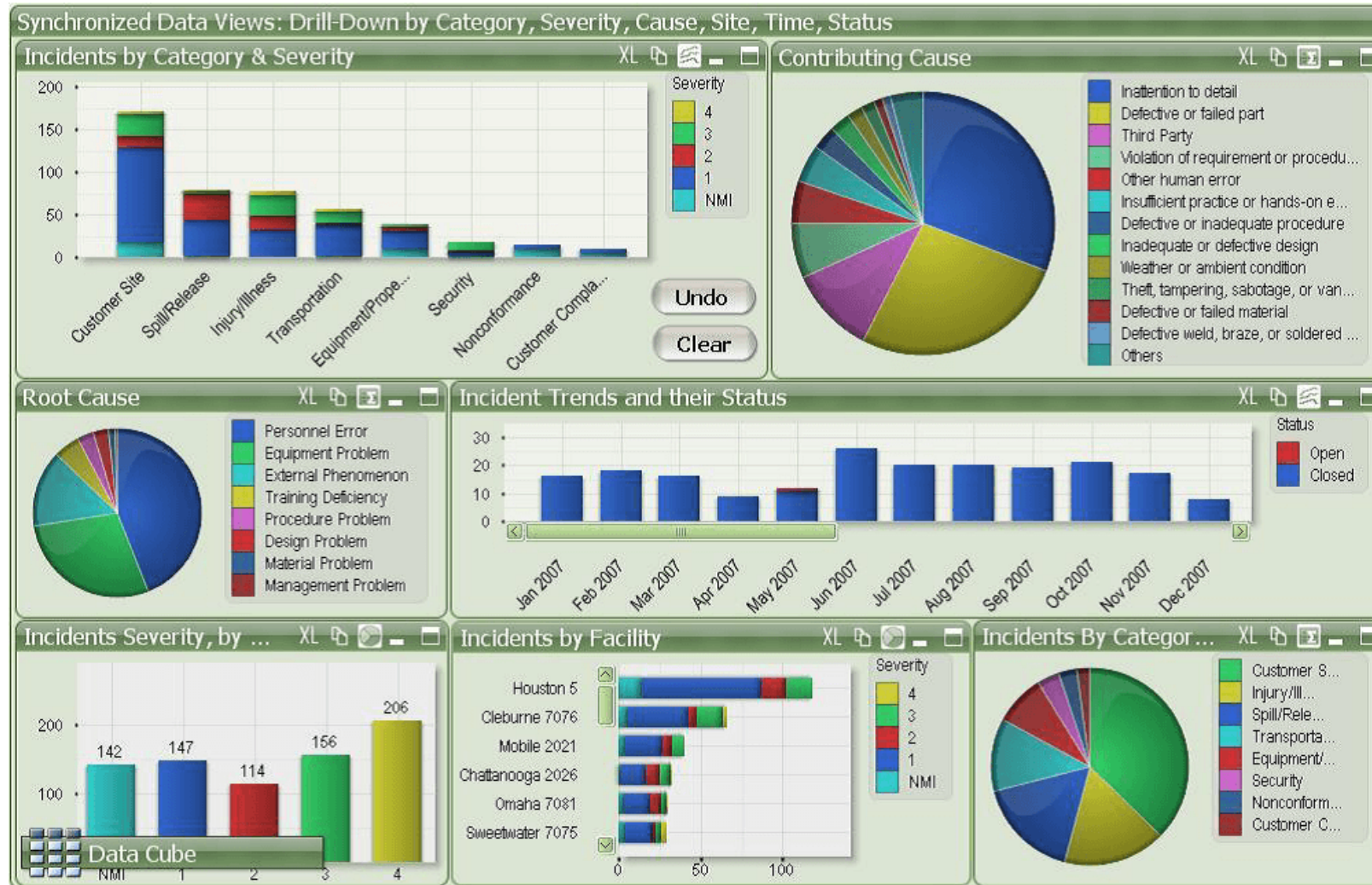


Adapted from “Information Dashboard Design” by Stephen Few

Reduce the non-data pixels/ink

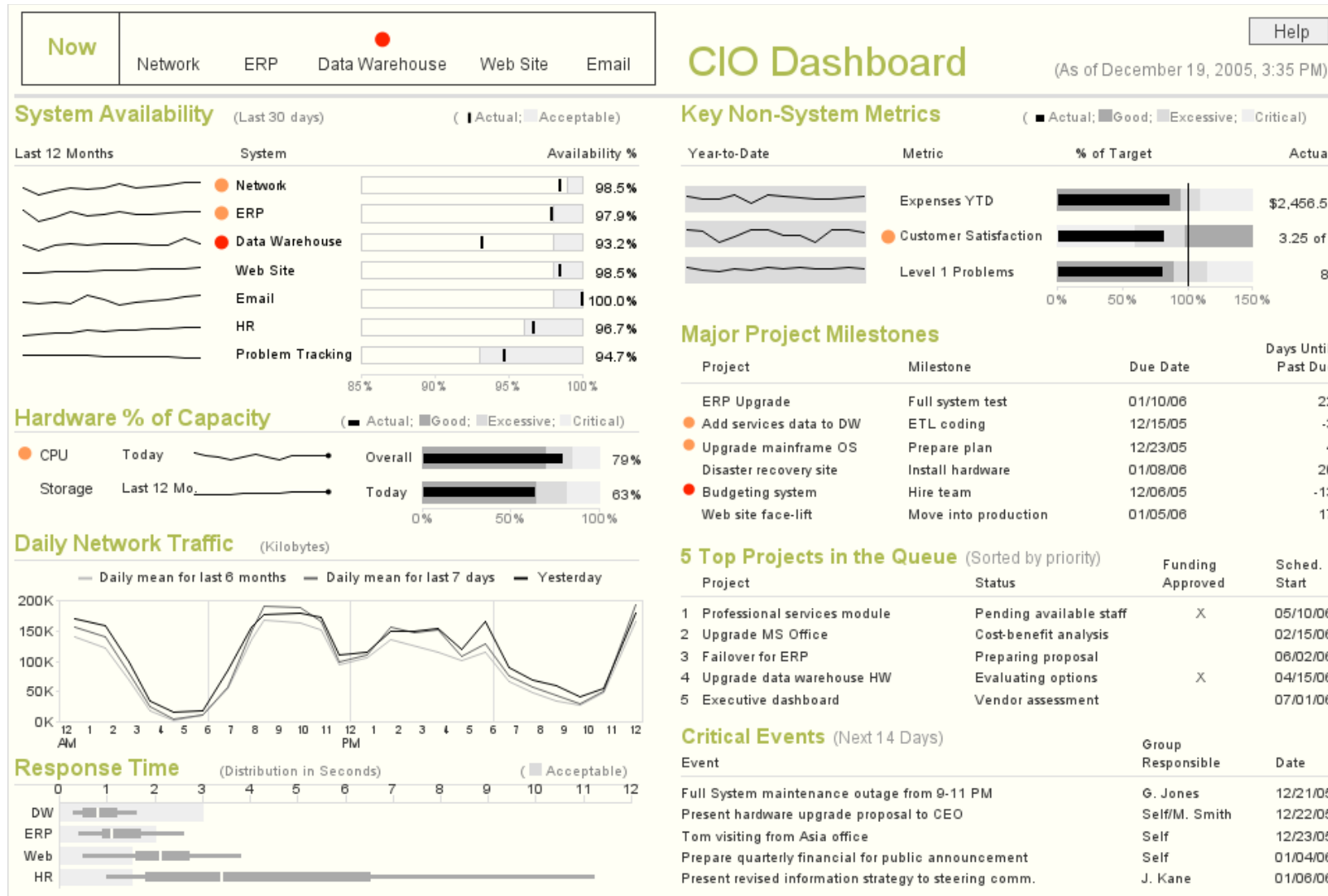


Perception overload



CIO Dashboard

19



Before and After Examples

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Project Risk Register

| Risk ID | Created Date | Risk Name | Response Strategy | Impact Area | Likelihood | Score | Category | Status |
|-------------------------------------------------------------|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|---------------|--------------------|-------------------|---------------------------------------|--------------------|
| Owner | | Description | | Trigger | Impact | Threat/Opp | Priority | Creator |
| Migration Status | | Comments | | Risk Response | Updated By | Date Last Updated | Closed By | Date Closed |
| About Me: Pictorial Based Medical Family History Collection | | | | | | | | PRJ007356 |
| RSK003671 | 6/26/2018 | Test Risk | Enhance | Cost | Low | 1 | Project Management/Change Management | Draft |
| Administrator, PPM | | Description Testing Risk Section. Testing Risk SectionTesting Risk Section Testing Risk SectionTesting Risk Section | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Low | | Medium | Administrator, PPM |
| Yellow | | | Risk Response Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Smith, John | 7/18/2018 | | |
| RSK003675 | 6/26/2018 | Test Risk 2 | Mitigate | Cost | Low | 1 | Regulatory/Procurement/Contracts | Closed |
| Administrator, PPM | | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionT | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Low | | High | Administrator, PPM |
| Green | | | Testing Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk SectionTesting Risk Section | | Smith, John | 7/18/2018 | Geise, Kraig A. | 7/18/2018 |
| RSK003678 | 6/26/2018 | Test Risk 3 | | Cost | High | 9 | Communication | Open |
| Smith, John | | testing | | | High | | Critical | Smith, John |
| | | | | | Administrator, PPM | 6/26/2018 | | |
| RSK003680 | 6/26/2018 | Test Risk 4 | | Business | Low | 1 | Approvals/Organization/Prioritization | Open |
| Smith, John | | | | | Low | | Low | Smith, John |
| | | | | | Administrator, PPM | 6/26/2018 | | |

Project Risk Register Report

Report run on: 9/17/18

Accelerated Mobile Pages (AMP)

PRJ010742

| Risk Name | Impact of ITP 2.0 to AMP expansion | | | Risk Response | |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Description | There is a risk that Apple's Intelligent Tracking Previsions (ITP) 2.0 will delay or prevent us from expanding the use of AMP pages | | | Based on analysis by vendor and approved 10/12/2016 by sponsor the likelihood of the data being useful is present but as we already utilized existing available retroactive data resources to make positive changes the depth of contribution of retroactive is not felt to be considerable. The proactive data drives the majority of the products functionality that the ED is targeting. It will also reduce the technical resources and by using non-traditional it will not impact other existing projects. | |
| Threat/Opp | Threat | | | | |
| Impact Area | Business | | | | |
| Likelihood | Medium | | | | |
| Impact | High | | | | |
| Score | 6 | | | Trigger | |
| Response Strategy | Mitigate | | | Unknown data would be needed to validate the output. If this occurs, the pilot would be closed. | |
| Risk ID | RSK00000528 | Category | Resources/Team/Training | Creator | Smith, John |
| Impact Area | Business | Status | Open | Created Date | 01/16/2017 |
| Owner | Smith, John | Priority | Medium | Updated By | Smith, John |
| Target Resolution | 02/15/2017 | | | Date Last Updated | 01/16/2017 |
| | | Closed By | Smith, John | Date Closed | |
| | | | | | |

| Risk Name | Amazon Alexa Proof of Concept | | | Risk Response | | Scope is considered of a higher weight for this project, and project leadership approved change to schedule extending project by three months but with scope remaining as originally requested. | |
|-------------------|----------------------------------------------------------------------------------------------|----------|-------------------------|-------------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Description | Due to longer than anticipated approvals the project could not begin as originally scheduled | | | | | | |
| Threat/Opp | Threat | | | Trigger | | | |
| Impact Area | Schedule | | | Comments | | | |
| Likelihood | High | | | | | | |
| Impact | High | | | | | | |
| Score | 9 | | | | | | |
| Response Strategy | Mitigate | | | | | | |
| | | | | | | | |
| Risk ID | RSK00000528 | Category | Resources/Team/Training | Creator | Smith, John | Closed By | Smith, John |
| Impact Area | Business | Status | Open | Created Date | 01/16/2017 | Date Closed | 01/16/2017 |
| Owner | Smith, John | Priority | Medium | Updated By | Smith, John | | |
| Target Resolution | 02/15/2017 | | | Date Last Updated | 01/16/2017 | | |
| | | | | | | | |
| | | | | | | | |

Standard Project Status Report

Run Date: 10/25/2018

Access Control System Replacement - [REDACTED]

PRJ002924

| | | | | | | | | | | | | |
|---|----------|---|-----------------|------------|--------------------|-------------|-------------------------|---|--------|--------|--------|--------|
| C | Finance | G | Report Date | | August 2017 | | Previous Overall Status | | | | | |
| | Schedule | R | Project Manager | | Administrator, PPM | | G | G | G | G | G | |
| | Scope | G | Start Date | 11/01/2013 | | Finish Date | 10/31/2017 | | Mar/16 | Jun/16 | Sep/16 | Dec/16 |

| | | | | | | | |
|---------------------|---------|-------------------------------|--|-------------------------|--|--|--|
| What is the status? | | Project Lead (Name and Title) | | Michael James E. J. CFP | | | |
| Stage | Execute | Administrative Owner (s) | | [REDACTED] | | | |
| Size | Medium | Committee Sponsor (s) | | | | | |

Description: The Access Control system in [REDACTED] will be migrated from [REDACTED] to a new system and platform using [REDACTED] system. This is a mandatory migration due to our current system reaching end of support and will affect both the application and database servers along with a large number of interfaces.

Replacement of the system with an enterprise solution will eventually allow for access cards to be used across the system in [REDACTED] and [REDACTED]. Each site will be implemented as a separate project with different funding sources, but ultimately with a unified and single solution. Provide shared technical support from internal IT to be cost effective.

Executive Summary: TEST

| Key Accomplishments | Risks |
|---------------------|-------|
| | |

| Milestones | | | | |
|------------|------------|---------------------------------------|--------|--------------------------|
| Baseline | Finish | Name | Status | Issues/Barriers/Comments |
| 09/01/2014 | 09/01/2014 | Server Configuration | C | |
| 09/01/2015 | 09/01/2015 | Program Migration | C | |
| 12/30/2016 | 12/30/2016 | Field Device Migration | C | |
| 02/01/2017 | 05/01/2017 | Date Project Closure Activities Begin | C | |

IT Implementation Date: 05/14/2016

| Financials | | | | |
|-----------------|------------------|-----------------|-------------------|---------------|
| | Estimated Amount | Approved Amount | Allocated To-Date | Spent To-Date |
| Project Capital | \$100,000 | \$100,000 | \$100,000 | \$100,000 |
| Project Expense | \$1,050,000 | \$1,050,000 | \$1,050,000 | \$800,000 |
| Project Total | \$1,150,000 | \$1,150,000 | \$1,150,000 | \$900,000 |

Legend: On Target to Meet Plan G Moderate Risk of Not Meeting Plan Y High Risk of Not Meeting Plan R On Hold H Completed C Cancelled CN Not Started NS

Standard Project Status Report

Report run on: 9/17/18

Access Control System Replacement

PRJ002924

| | | | | | | | | | | |
|--------|----------|--|-------------------------|--------------------|-------------|-------------------------|--------|--------|--------|--------|
| | Finance | | Report Date | August 2017 | | Previous Overall Status | | | | |
| | Schedule | | Project Manager | Administrator, PPM | | | | | | |
| | Scope | | Start Date | 11/01/2013 | Finish Date | 10/31/2013 | Mar/16 | Jun/16 | Sep/16 | Dec/16 |
| Region | | | Exec Owner(s) | Smith, John | | | | | | |
| Stage | Execute | | Administrative Owner(s) | Smith, John | | | | | | |
| Size | Medium | | Committee Sponsor(s) | | | | | | | |

Project Description

The Access Control system in area will be migrated from system 1 to a new system and platform using the old system. This is a mandatory migration due to our current system reaching end of support and will affect both the application and database servers along with a large number of interfaces. Replacement of the system with an enterprise solution will eventually allow for access cards to be used across the system, but ultimately with a unified and single solution. Provide shared technical support from internal IT to be cost effective.

Executive Summary

The Access Control system in area will be migrated from system 1 to a new system and platform using the old system. This is a mandatory migration due to our current system reaching end of support and will affect both the application and database servers along with a large number of interfaces. Replacement of the system with an enterprise solution will eventually allow for access cards to be used across the system, but ultimately with a unified and single solution. Provide shared technical support from internal IT to be cost effective.

Key Accomplishments

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci.

Risks

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis urna. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci.

Milestones

| Baseline | Finish | Name | Status | Issues/Barriers/Comments |
|------------|------------|--------------------------------------|--------|--------------------------|
| 09/01/2014 | 09/01/2014 | Server Configuration | | |
| 09/01/2015 | 09/01/2015 | Program Migration | | |
| 12/30/2016 | 12/30/2016 | Field Device Migration | | |
| 02/01/2017 | 05/01/2017 | Date Project Closure Activites Be... | | |

[illegible]

Enterprise Administration Portfolio - Project Timeline May 2017

Report run on: 9/17/18

Roadmap

| Project Name | Status | Stage | Start | Finish | Q1 2017 | Q2 2017 | Q3 2017 | Q4 2017 | Q1 2018 | Q2 2018 | Q3 2018 | Q4 2018 | Q1 2019 | Q2 2019 | Q3 2019 | Q4 2019 | Q1 2020 | Q2 2020 | Q3 2020 |
|--------------|-----------------------------------|----------|-----------|------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| | On Target to Meet Plan | Initiate | 1/1/2018 | 12/31/2018 | | | | | | | | ★ | | | | | | | |
| | Moderate Risk of Not Meeting Plan | Initiate | 12/1/2018 | 12/31/2019 | | | | | | | | | | | | | | | |
| | High Risk of Not Meeting Plan | Initiate | 11/1/2018 | 12/31/2019 | | | | | | | | | | | | | | | |
| | On Target to Meet Plan | Initiate | 1/1/2018 | 1/1/2019 | | | | | | | | ★ | | | | | | | |
| | On Target to Meet Plan | Initiate | 9/1/2017 | 12/31/2020 | | | | | | | | | | | | | | | |
| | On Target to Meet Plan | Initiate | 9/1/2018 | 12/31/2020 | | | | | | | | | | | | | | | |

On Target to Meet Plan

Moderate Risk of Not Meeting Plan

High Risk of Not Meeting Plan

Completed

Cancelled

On Hold

★ IT Implementation Date

| Project Name | | Owner(s) | Administrative Owner(s) | Overall Project Status | Start | Finish | Capital |
|-------------------------------------|---------|----------|-------------------------|------------------------|---------|---------|----------|
| Enterprise Administration Portfolio | | | | | | | |
| | Close | | | C | 4/2016 | 9/2016 | \$14.6M |
| | Execute | | | R | 4/2014 | 7/2019 | \$10.3M |
| | Execute | | | G | 6/2014 | 12/2017 | \$14.5M |
| | Execute | | | Y | 10/2014 | 12/2017 | \$119.9M |
| | Execute | | | Y | 7/2017 | 12/2019 | |
| | Execute | | | CN | 8/2017 | 10/2020 | |

State of Indiana

Dashboard – May 2017

Report run on: 9/17/18

Enterprise Administration Portfolio

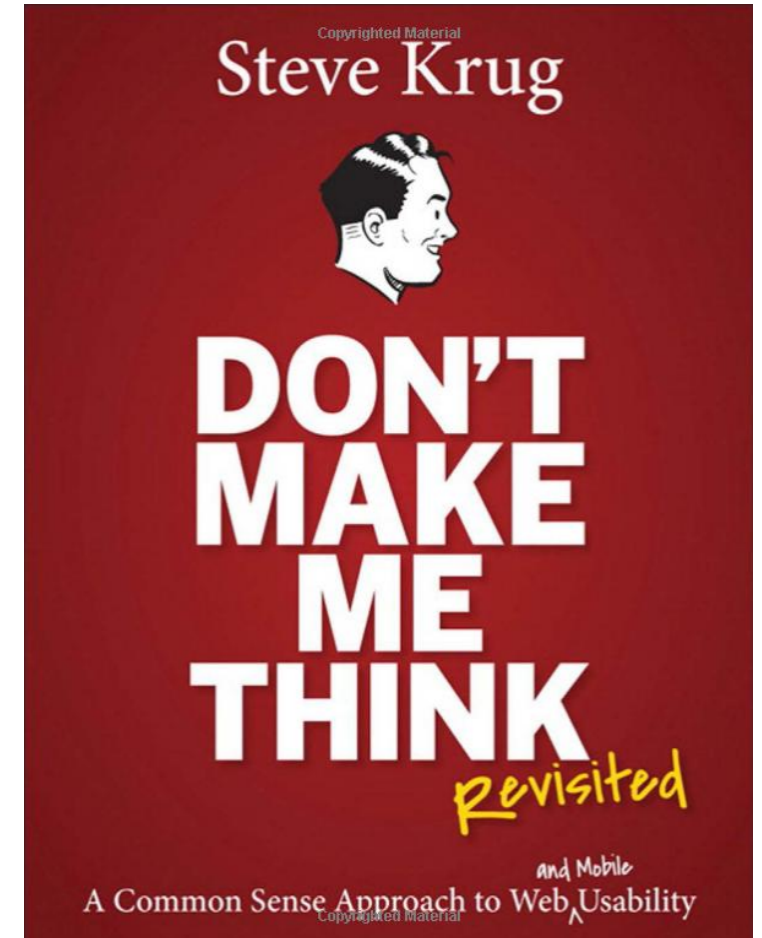
| Project Name | Stage | Owner(s) | Administrative Owner(s) | Overall Project Status | Start | Finish | Capital |
|-------------------------------------|----------|-------------------------------------|-------------------------------------|------------------------|------------|------------|----------|
| Enterprise Administration Portfolio | Close | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 04/01/2016 | 09/01/2016 | \$14.6M |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 04/01/2014 | 07/01/2019 | \$10.3M |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 06/01/2014 | 12/01/2017 | \$14.5M |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 10/01/2014 | 12/01/2017 | \$119.9M |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 07/01/2017 | 12/01/2019 | |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 08/01/2017 | 10/01/2020 | |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 01/01/2017 | 12/01/2019 | |
| Enterprise Administration Portfolio | Execute | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 01/01/2017 | 12/01/2019 | |
| Enterprise Administration Portfolio | Initiate | Enterprise Administration Portfolio | Enterprise Administration Portfolio | | 11/01/2017 | 12/01/2018 | |

The User Experience

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It's all about your audience

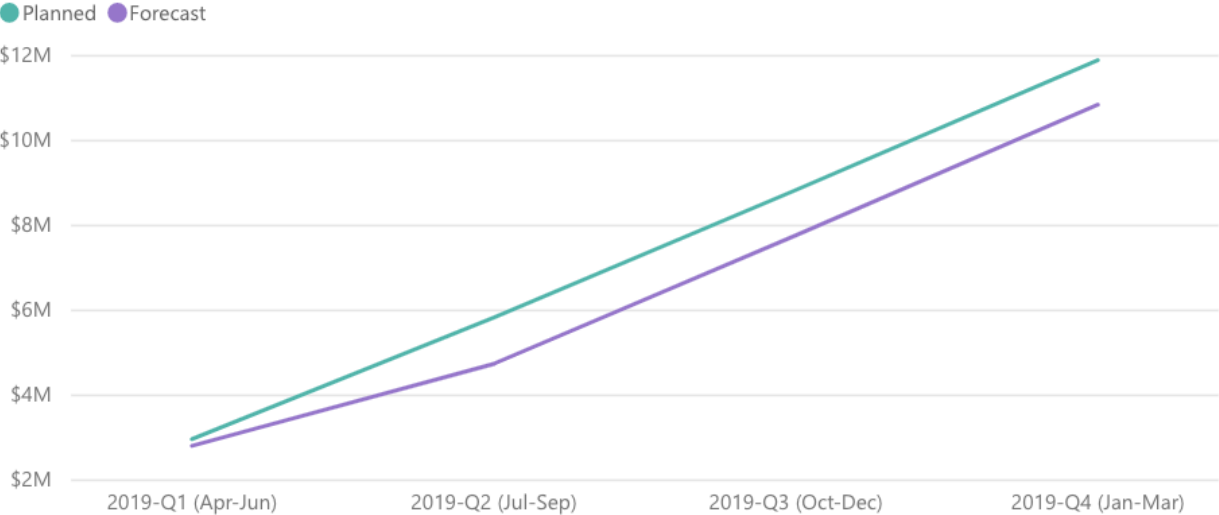
- The audience should not have to spend any time trying to understand what the report is attempting to convey
- It's all about what your audience perceives to provide value
- It's not what you think



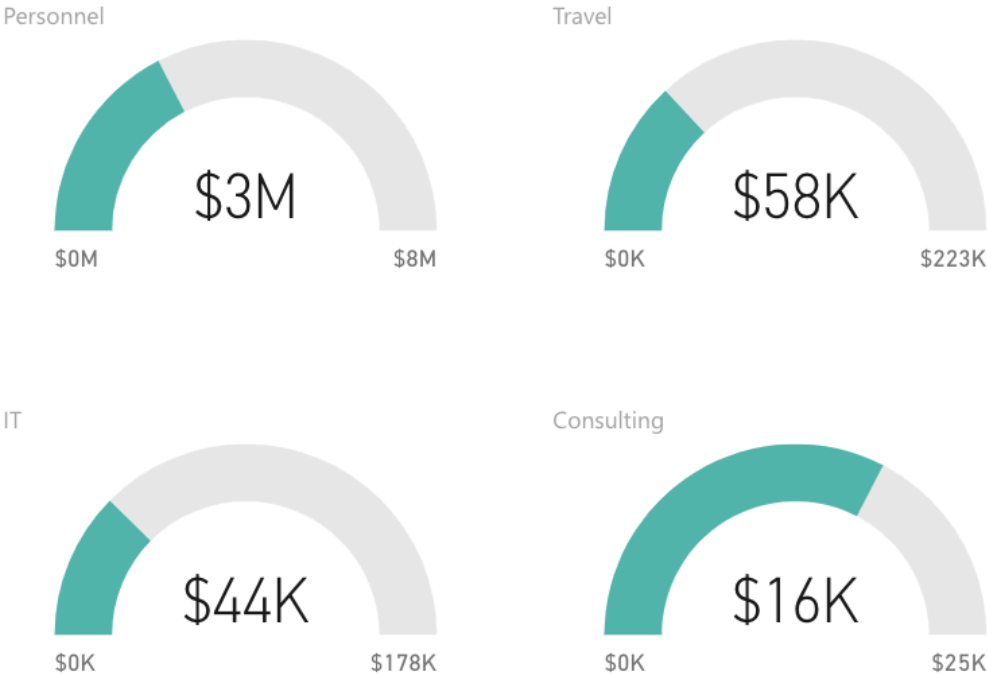
FY19 PPM Product Development

- Department
- 10011442 US ITBM PPM Dev
 - 10011527 US ITBM PPM Prod Mgt
 - 10011562 US Proj & Portfolio Mgmt Dev
 - 73020035 India ITBM PPM Dev
 - 73020193 India ITBM PPM Prod Mgt

Cumulative Plan vs Forecast



Actual Cost as % of Plan



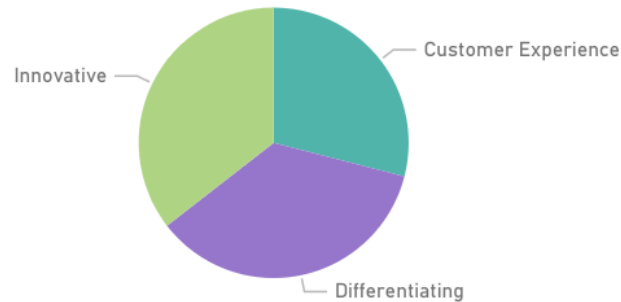
| Quarter | 2019-Q1 (Apr-Jun) | | | 2019-Q2 (Jul-Sep) | | | 2019-Q3 (Oct-Dec) | | | 2019-Q4 (Jan-Mar) | | | Total | | |
|------------|-------------------|-------------|-------------|-------------------|-------------|-------------|-------------------|-------------|----------|-------------------|-------------|----------|-------------|-------------|-------------|
| Group | Planned | Forecast | Variance | Planned | Forecast | Variance | Planned | Forecast | Variance | Planned | Forecast | Variance | Planned | Forecast | Variance |
| Consulting | \$6,705 | \$16,320 | (\$9,615) | \$4,917 | \$6,705 | (\$1,788) | \$6,705 | \$6,705 | \$0 | \$6,705 | \$6,705 | \$0 | \$25,032 | \$36,435 | (\$11,403) |
| IT | \$47,765 | \$44,253 | \$3,513 | \$35,028 | \$47,765 | (\$12,737) | \$47,765 | \$47,765 | \$0 | \$47,765 | \$47,765 | \$0 | \$178,324 | \$187,549 | (\$9,225) |
| Office | \$975 | \$50 | \$925 | \$715 | \$975 | (\$260) | \$975 | \$975 | \$0 | \$975 | \$975 | \$0 | \$3,640 | \$2,975 | \$665 |
| Personnel | \$1,963,299 | \$2,084,772 | (\$121,473) | \$1,683,684 | \$1,817,061 | (\$133,377) | \$2,012,105 | \$2,012,105 | \$0 | \$2,048,251 | \$2,048,251 | \$0 | \$7,707,339 | \$7,962,189 | (\$254,850) |
| Travel | \$59,833 | \$58,481 | \$1,352 | \$43,878 | \$59,833 | (\$15,955) | \$59,833 | \$59,833 | \$0 | \$59,833 | \$59,833 | \$0 | \$223,377 | \$237,981 | (\$14,604) |
| Total | \$2,078,578 | \$2,203,876 | (\$125,299) | \$1,768,222 | \$1,932,339 | (\$164,118) | \$2,127,384 | \$2,127,384 | \$0 | \$2,163,530 | \$2,163,530 | \$0 | \$8,137,713 | \$8,427,129 | (\$289,416) |

Release

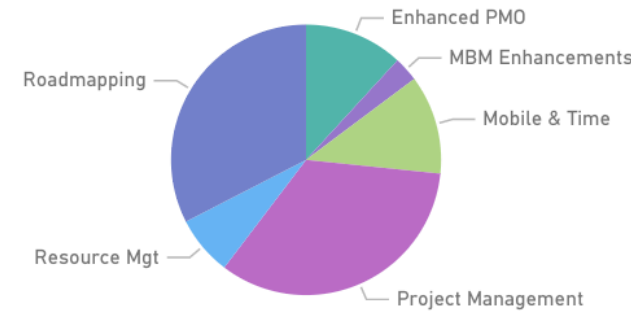
- ☐ 2018-Q1
- ☐ 2018-Q2
- ☐ 2018-Q3

FY19 PPM Product Development

Accepted Storypoints by Investment Category



Initiative Mix by Storypoint



On Track

Overall Status

| Initiative | Feature | Investment Category | Release | Accepted Storypoints | % Done by Storycount |
|----------------------|------------------------------------|---------------------|---------|----------------------|----------------------|
| Enhanced PMO | BI & DWH Improvements | Customer Experience | 2018-Q2 | 5 | 50 % |
| | New Investment Types | Innovative | 2018-Q3 | 15 | 10 % |
| Financial Management | Submit Budgets | Customer Experience | 2018-Q3 | | 10 % |
| MBM Enhancements | MBM Investment Integration | Differentiating | 2018-Q2 | 5 | 50 % |
| Mobile & Time | Mobile Time Platform | Differentiating | 2018-Q3 | 15 | 20 % |
| | Timesheet enhancements | Customer Experience | 2018-Q1 | 5 | 100 % |
| Project Management | % Complete Visual on Project Tiles | Customer Experience | 2018-Q2 | 2 | 100 % |
| | Copy Links and To Do's | Differentiating | 2018-Q2 | 5 | |
| | Cross Project Task Grid | Differentiating | 2018-Q1 | 10 | 100 % |
| | Risk Issues - Grid Improvements | Customer Experience | 2018-Q1 | 5 | 100 % |
| | Staffing in Projects | Customer Experience | 2018-Q2 | 25 | 100 % |
| | Teams - Assign to Tasks | Differentiating | 2018-Q2 | 10 | |
| Resource Mgt | Staffing - Replace Roles | Customer Experience | 2018-Q3 | 2 | 0 % |
| | Staffing - Teams | Differentiating | 2018-Q2 | 10 | 20 % |
| Roadmapping | Roadmap - Capacity & FTE | Differentiating | 2018-Q2 | 5 | 100 % |
| | Roadmap Clipping | Innovative | 2018-Q1 | 15 | 100 % |
| | Roadmap Grid Improvements | Customer Experience | 2018-Q2 | 5 | 50 % |
| | Roadmap Capacity Constraints | Innovative | 2018-Q1 | 10 | 100 % |

Status Update

15.5 is progressing nicely. We are having an issue with Mobile Time. The team responsible for some of the delivery has to spend more time on a grid feature for roadmapping, and is delaying their work for time. This will have the effect of delaying the release of Mobile Time by a month or so. Now slated for end of October, very early November. Mobile Time is released independently of the product, so the release is not impacted, but we have several customers who will be upset by this: Northern Trust, and United.

Key Accomplishments

15.4.1 shipped. Key features are: Roadmap Targets and the ability to do Constraint based planning. This enables customers to plan their investments against their initiative budgets. Syncing and importing project data from PPM. This enables customers to pull real data from PPM into the roadmaps, and smart sync it with just the information they need. Staffing in the projects. This allows project managers to review their staffing plan from within the project. Previously they needed to go to the staffing module for this. This was another blocker removed for people upgrading.

Upcoming work

Building out the estimates for Big Room Planning for the 15.5.1 release. BRP Scheduled for September 4th in Santa Clara

Help Your Customers Stay Focused

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Goal, Question, Metric (GQM approach)

Balance Portfolio Spend

| Question | Metric / Data |
|--------------------------------------------------------|------------------------------------------------------------|
| Are we effectively managing our Capex vs. Opex spend? | Aggregate of portfolio dollars by Capex and Opex |
| What type of work are resources forecasted to work on? | Resource Capex ETCs vs. Resource Opex ETCs |
| What type of work have resources worked on? | Resource Capex Actual Hours vs. Resource Opex Actual Hours |
| What is the total project spend by spend type? | Total Capex vs. Opex spend by project |

Manage the Project Portfolio

| Question | Metric / Data |
|---------------------------------------------|---------------------------------------------------|
| What are the major risks for the portfolio? | High priority / impact risks by program / project |
| How effective is our gating process? | Stage Throughput (Avg time /gate) |

Forecast Portfolio Demand

| Question | Metric / Data |
|---------------------------------------------|-----------------------------|
| What is the average product time to market? | Product Inception to Launch |

Manage the Project

| Question | Metric / Data |
|-------------------------------------------------|----------------------------------------------------|
| Are we meeting the project schedule? | Project End Date Variance |
| Are risks and issues being managed effectively? | Number of active or high priority risks and issues |

Questions?



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- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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Let us know how we can improve!
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Email

info@regouniversity.com



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www.regouniversity.com