regoUniversity 2021
VIRTUAL

Dashboards/Metrics | Best Practices

Your Guides:
Josh Childers & Sara Garvey

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

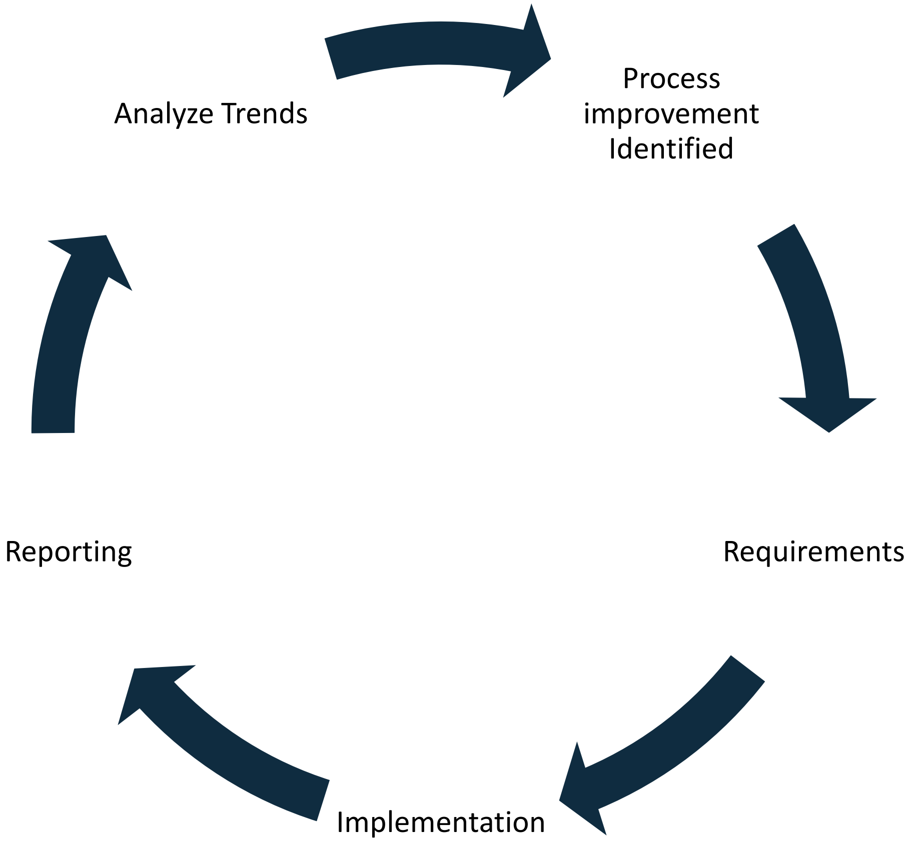
Metric Types
- Quantitative
- Qualitative

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


Analyze Trends
Process improvement Identified
Requirements
Implementation
Reporting

Key Metrics By Functional Area

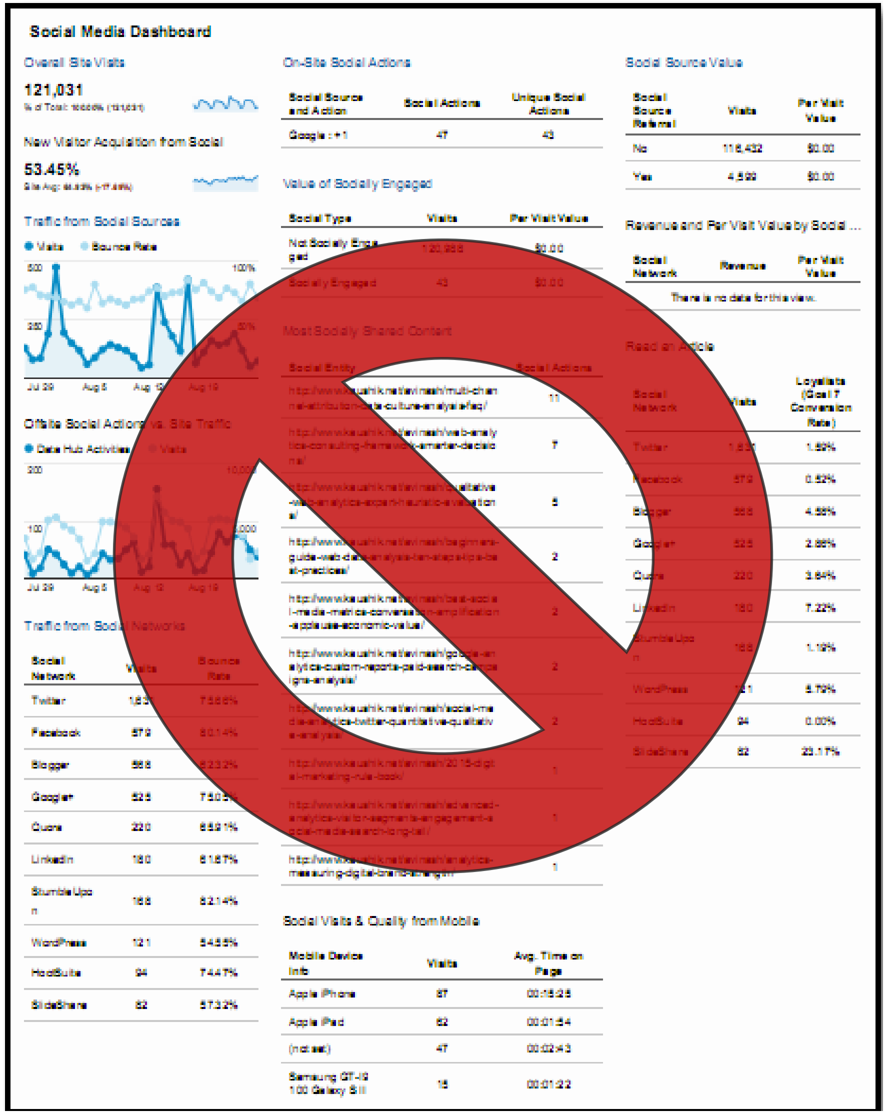
- Scope
  - # changes / project duration in days (bad req. or bad PM)
  - Customer satisfaction (survey 1-10)
- Schedule
  - % of open tasks with finish date < one week ago (stale)
  - % projects on-time
  - % of tasks completed on time
  - % of tasks completed within baseline duration
  - % of tasks 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

Overview of Dashboards

- Many companies have executives that find it too complicated to navigate in CA PPM with too many places 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.



Social Media Dashboard

Overall Site Visits

121,031
% of Total: 100.00% (121,031)

New Visitor Acquisition from Social

53.45%

Traffic from Social Sources

Offsite Social Actions vs. Site Traffic

Traffic from Social Networks

Social Network	Visits	Bounce Rate
Twitter	[illegible]	75.66%
Facebook	579	80.14%
Blogger	566	82.32%
Google+	525	75.05%
Quora	220	65.91%
LinkedIn	180	61.67%
StumbleUpon	168	82.14%
WordPress	121	54.55%
HootSuite	94	74.47%
SlideShare	82	57.32%

On-Site Social Actions

Social Source and Action	Social Actions	Unique Social Actions
Google : +1	47	43

Value of Socially Engaged

Social Type	Visits	Per Visit Value
Not Socially Engaged	120,988	$0.00
Socially Engaged	43	$0.00

Most Socially Shared Content

Social Entity	Social Actions
http://www.kaushik.net/avinash/multi-channel-attribution-data-culture-analysis-faq/	11
http://www.kaushik.net/avinash/web-analytics-consulting-framework-smarter-decisions/	7
http://www.kaushik.net/avinash/qualitative-web-analytics-expert-heuristic-evaluations/	5
http://www.kaushik.net/avinash/beginners-guide-web-data-analysis-ten-steps-tips-best-practices/	2
http://www.kaushik.net/avinash/best-social-media-metrics-conversation-amplification-applause-economic-value/	2
http://www.kaushik.net/avinash/google-analytics-custom-reports-paid-search-campaigns-analysis/	2
http://www.kaushik.net/avinash/social-media-analytics-twitter-quantitative-qualitative-analysis/	2
http://www.kaushik.net/avinash/2015-digital-marketing-rule-book/	1
http://www.kaushik.net/avinash/advanced-analytics-visitor-segments-engagement-social-media-search-long-tail/	1
http://www.kaushik.net/avinash/analytics-measuring-digital-brand-strength/	1

Social Visits & Quality from Mobile

Mobile Device Info	Visits	Avg. Time on Page
Apple iPhone	87	00:15:25
Apple iPad	62	00:01:54
(not set)	47	00:02:43
Samsung GT-I9100 Galaxy S II	15	00:01:22

Social Source Value

Social Source Referral	Visits	Per Visit Value
No	116,432	$0.00
Yes	4,599	$0.00

Revenue and Per Visit Value by Social ...

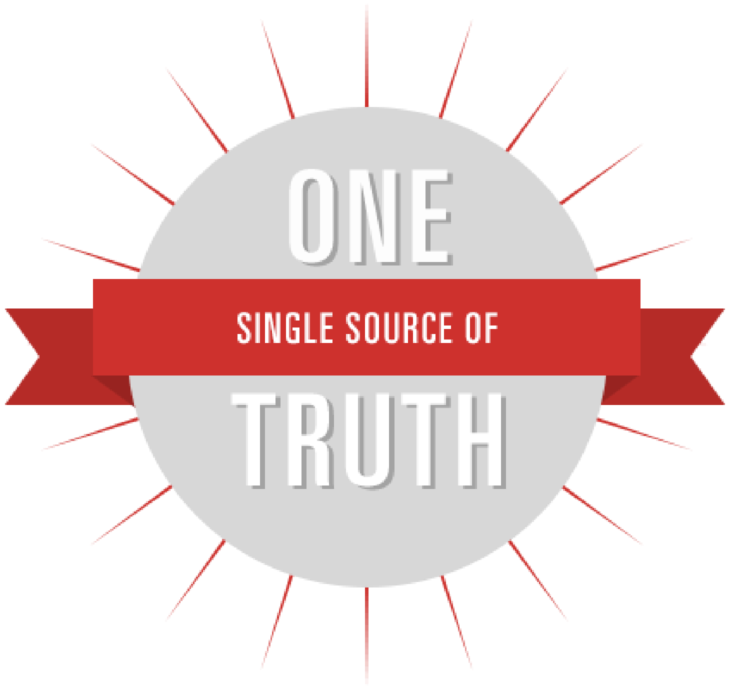
Social Network	Revenue	Per Visit Value
There is no data for this view.		

Read an Article

Social Network	Visits	Loyalists (Goal 7 Conversion Rate)
Twitter	[illegible]	1.59%
Facebook	579	0.52%
Blogger	566	4.59%
Google+	525	2.86%
Quora	220	3.64%
LinkedIn	180	7.22%
StumbleUpon	168	1.19%
WordPress	121	5.79%
HootSuite	94	0.00%
SlideShare	82	23.17%

- 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, easy to understand (intuitive), and 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 look 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

HELLO
my name is
CONSISTENCY
I MAKE IT HAPPEN DAY IN AND DAY OUT. YOU MIGHT KNOW MY GOOD FRIEND, SUCCESS... WE'RE ALWAYS HANGING OUT!

Dashboard Levels

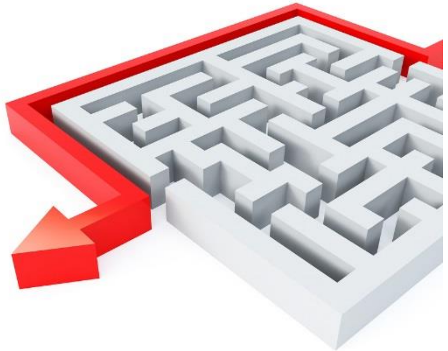
- Not all Dashboards are for all audiences
- When creating dashboards, it is critical to understand the consumers of the information being reported
- Common audiences that will be viewing dashboards include
  - CEO/board level
  - Corporate vice president/director level
  - IT/Bus strategic level, similar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

Maybe
Yes
No

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 data sources
  - Variety of data visualizations

Tools For Dashboards

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

Common Target Users

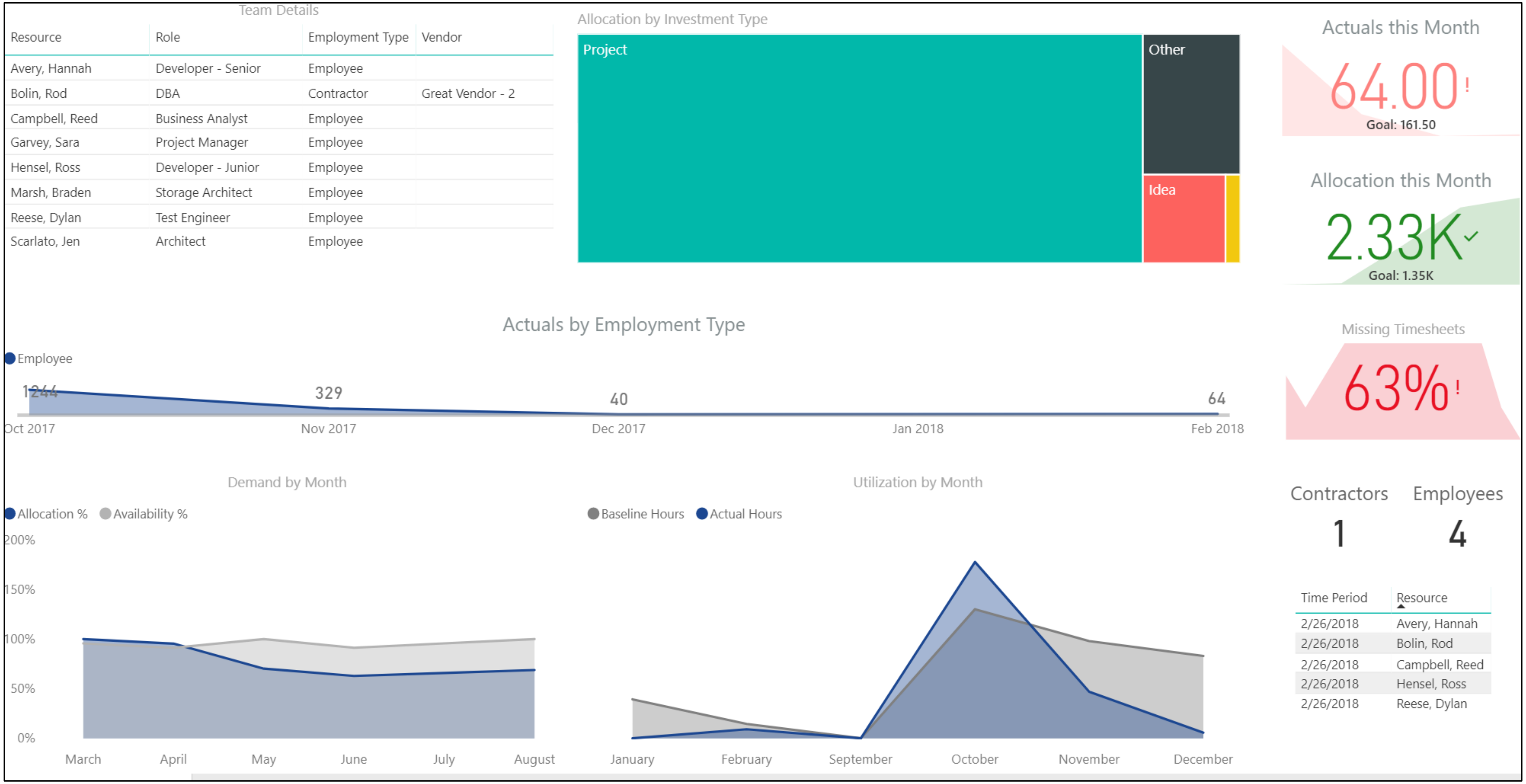
- CIO
- Senior Management (VPs/Directors)
- Middle Management (Project /Resource /Portfolio /Operational Managers)
- Internal Customers (Department/Branch Heads)
- External Customers (Public/Departments/Branches)

PowerBI Metric Dashboards

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



Team Details

Resource	Role	Employment Type	Vendor
Avery, Hannah	Developer - Senior	Employee	
Bolin, Rod	DBA	Contractor	Great Vendor - 2
Campbell, Reed	Business Analyst	Employee	
Garvey, Sara	Project Manager	Employee	
Hensel, Ross	Developer - Junior	Employee	
Marsh, Braden	Storage Architect	Employee	
Reese, Dylan	Test Engineer	Employee	
Scarlato, Jen	Architect	Employee	

Actuals this Month
64.00!
Goal: 161.50

Allocation this Month
2.33K✓
Goal: 1.35K

Missing Timesheets
63%!

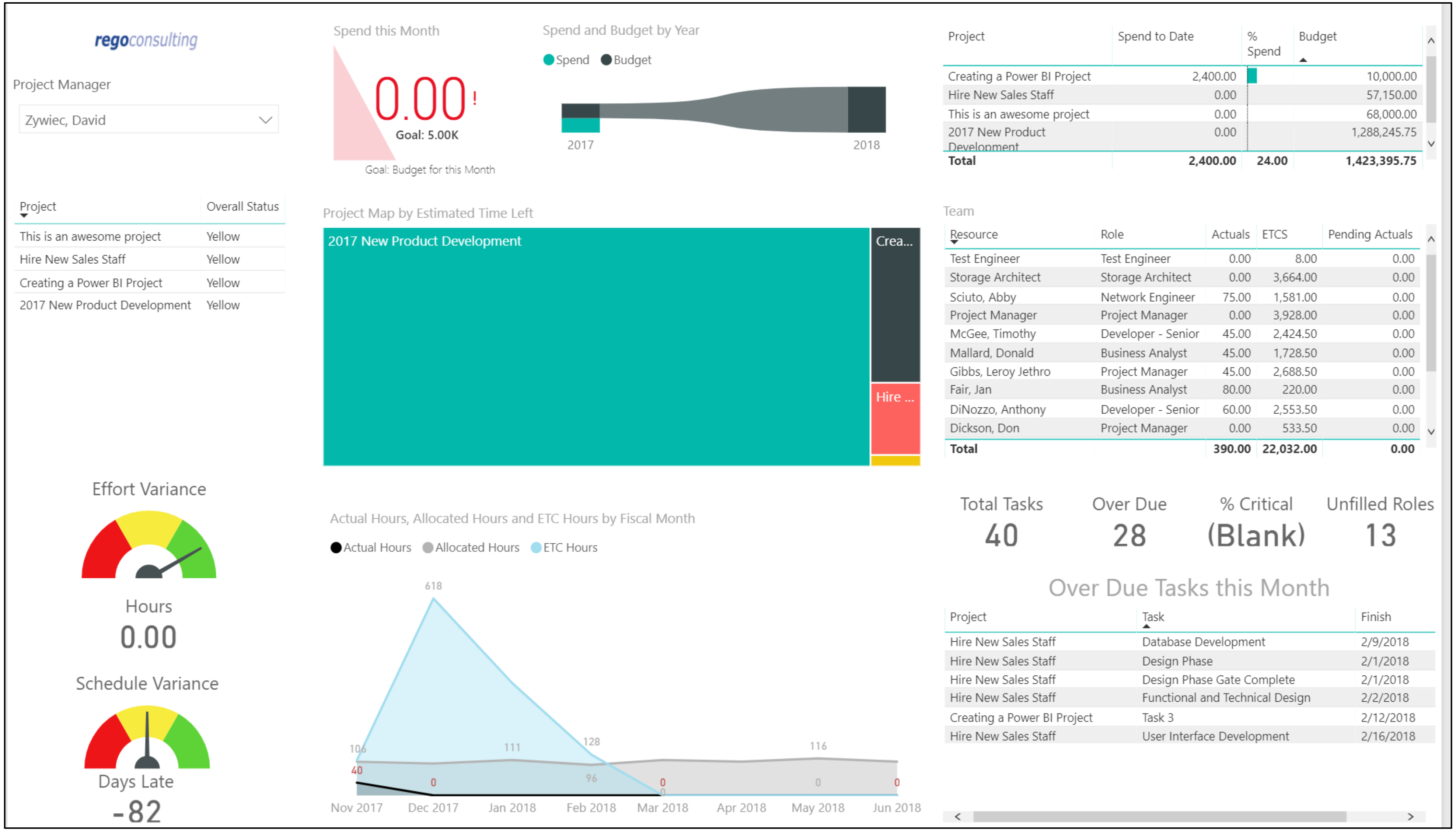
Contractors	Employees
1	4

Time Period	Resource
2/26/2018	Avery, Hannah
2/26/2018	Bolin, Rod
2/26/2018	Campbell, Reed
2/26/2018	Hensel, Ross
2/26/2018	Reese, Dylan

Allocation by Investment Type
Project
Other
Idea
Actuals by Employment Type
● Employee
1244
329
40
64
Oct 2017
Nov 2017
Dec 2017
Jan 2018
Feb 2018
Demand by Month
● Allocation %
● Availability %
200%
150%
100%
50%
0%
March
April
May
June
July
August
Utilization by Month
● Baseline Hours
● Actual Hours
January
February
September
October
November
December

PowerBI – Project Mgr Dash

PowerBI


regoconsulting
Spend this Month
0.00!
Goal: 5.00K
Goal: Budget for this Month
Spend and Budget by Year
● Spend
● Budget
2017
2018
Project Map by Estimated Time Left
2017 New Product Development
Crea...
Hire ...
Actual Hours, Allocated Hours and ETC Hours by Fiscal Month
● Actual Hours
● Allocated Hours
● ETC Hours
618
106
40
0
111
128
96
0
0
116
0
0
Nov 2017
Dec 2017
Jan 2018
Feb 2018
Mar 2018
Apr 2018
May 2018
Jun 2018
Effort Variance
Schedule Variance

Project Manager

Zywiec, David

Project	Overall Status
This is an awesome project	Yellow
Hire New Sales Staff	Yellow
Creating a Power BI Project	Yellow
2017 New Product Development	Yellow

Effort Variance

Hours
0.00

Schedule Variance

Days Late
-82

Project	Spend to Date	% Spend	Budget
Creating a Power BI Project	2,400.00		10,000.00
Hire New Sales Staff	0.00		57,150.00
This is an awesome project	0.00		68,000.00
2017 New Product Development	0.00		1,288,245.75
Total	**2,400.00**	**24.00**	**1,423,395.75**

Team

Resource	Role	Actuals	ETCS	Pending Actuals
Test Engineer	Test Engineer	0.00	8.00	0.00
Storage Architect	Storage Architect	0.00	3,664.00	0.00
Sciuto, Abby	Network Engineer	75.00	1,581.00	0.00
Project Manager	Project Manager	0.00	3,928.00	0.00
McGee, Timothy	Developer - Senior	45.00	2,424.50	0.00
Mallard, Donald	Business Analyst	45.00	1,728.50	0.00
Gibbs, Leroy Jethro	Project Manager	45.00	2,688.50	0.00
Fair, Jan	Business Analyst	80.00	220.00	0.00
DiNozzo, Anthony	Developer - Senior	60.00	2,553.50	0.00
Dickson, Don	Project Manager	0.00	533.50	0.00
Total		**390.00**	**22,032.00**	**0.00**

Total Tasks	Over Due	% Critical	Unfilled Roles
40	28	(Blank)	13

Over Due Tasks this Month

Project	Task	Finish
Hire New Sales Staff	Database Development	2/9/2018
Hire New Sales Staff	Design Phase	2/1/2018
Hire New Sales Staff	Design Phase Gate Complete	2/1/2018
Hire New Sales Staff	Functional and Technical Design	2/2/2018
Creating a Power BI Project	Task 3	2/12/2018
Hire New Sales Staff	User Interface Development	2/16/2018

RegoXchange

regoXchange

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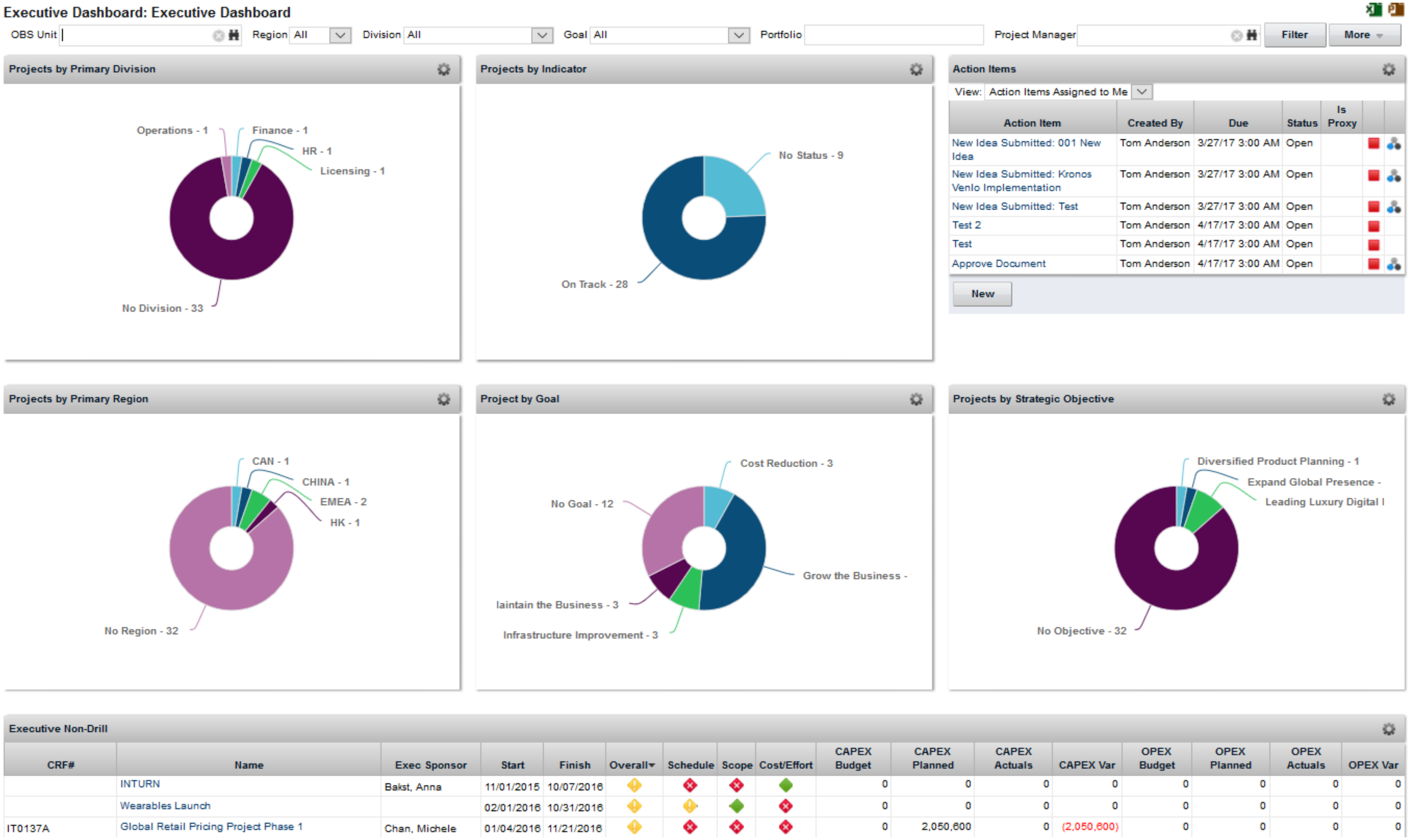
Let Rego be your guide.

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
Operations - 1
Finance - 1
HR - 1
Licensing - 1
No Division - 33
Projects by Indicator
No Status - 9
On Track - 28
Projects by Primary Region
CAN - 1
CHINA - 1
EMEA - 2
HK - 1
No Region - 32
Project by Goal
Cost Reduction - 3
No Goal - 12
Grow the Business -
laintain the Business - 3
Infrastructure Improvement - 3
Projects by Strategic Objective
Diversified Product Planning - 1
Expand Global Presence -
Leading Luxury Digital I
No Objective - 32

Action Items

View: Action Items Assigned to Me

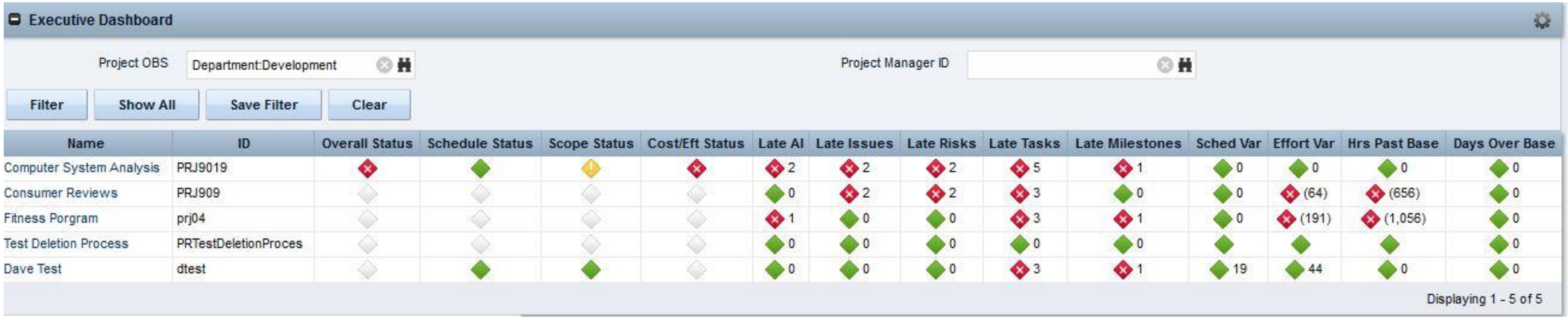
Action Item	Created By	Due	Status	Is Proxy	
New Idea Submitted: 001 New Idea	Tom Anderson	3/27/17 3:00 AM	Open		🟥
New Idea Submitted: Kronos Venlo Implementation	Tom Anderson	3/27/17 3:00 AM	Open		🟥
New Idea Submitted: Test	Tom Anderson	3/27/17 3:00 AM	Open		🟥
Test 2	Tom Anderson	4/17/17 3:00 AM	Open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

New

Executive Non-Drill

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

regoXchange – Exec Dashboard



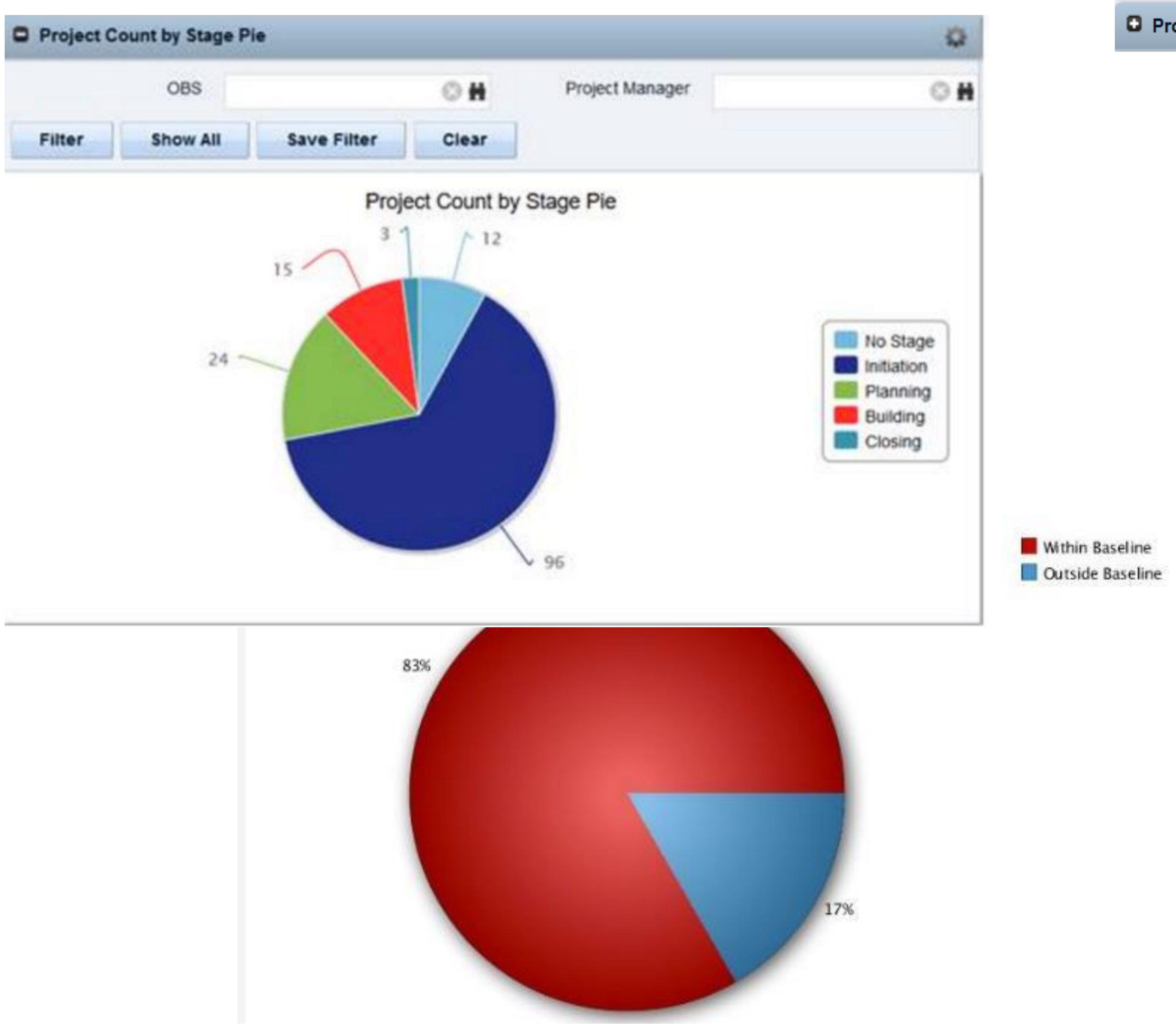
Project OBS: Department:Development

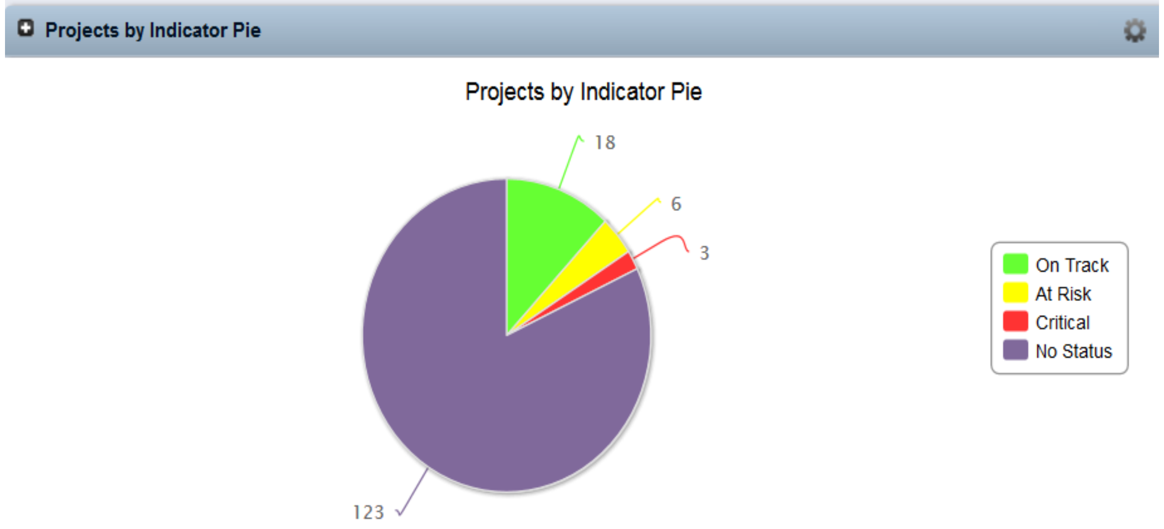
Project Manager ID:

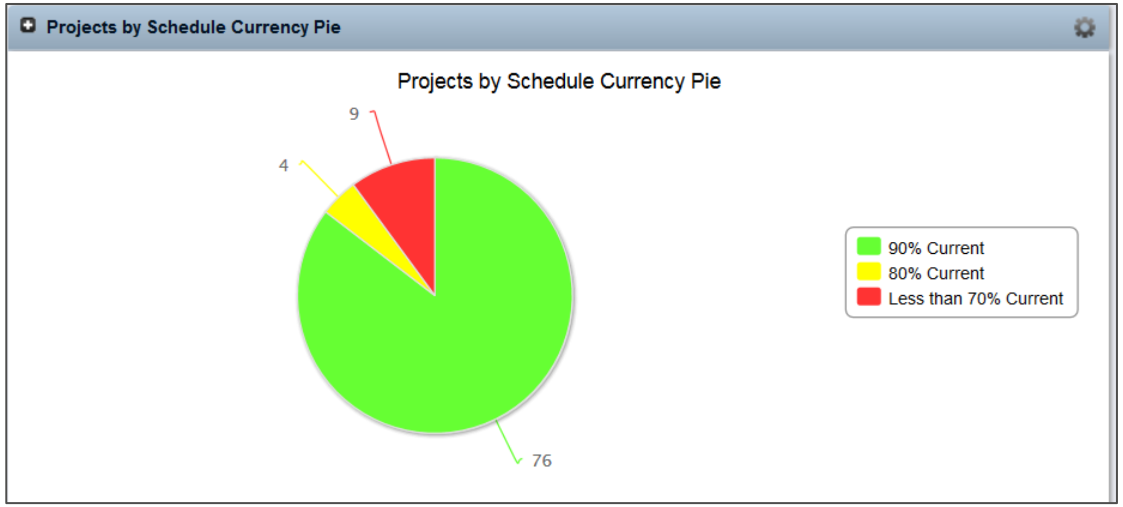
Name	ID	Overall Status	Schedule Status	Scope Status	Cost/Eft Status	Late AI	Late Issues	Late Risks	Late Tasks	Late Milestones	Sched Var	Effort Var	Hrs Past Base	Days Over Base
Computer System Analysis	PRJ9019	🟥	🟩	🟨	🟥	🟥 2	🟥 2	🟥 2	🟥 5	🟥 1	🟩 0	🟩 0	🟩 0	🟩 0
Consumer Reviews	PRJ909	◇	◇	◇	◇	🟩 0	🟥 2	🟥 2	🟥 3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

Displaying 1 - 5 of 5

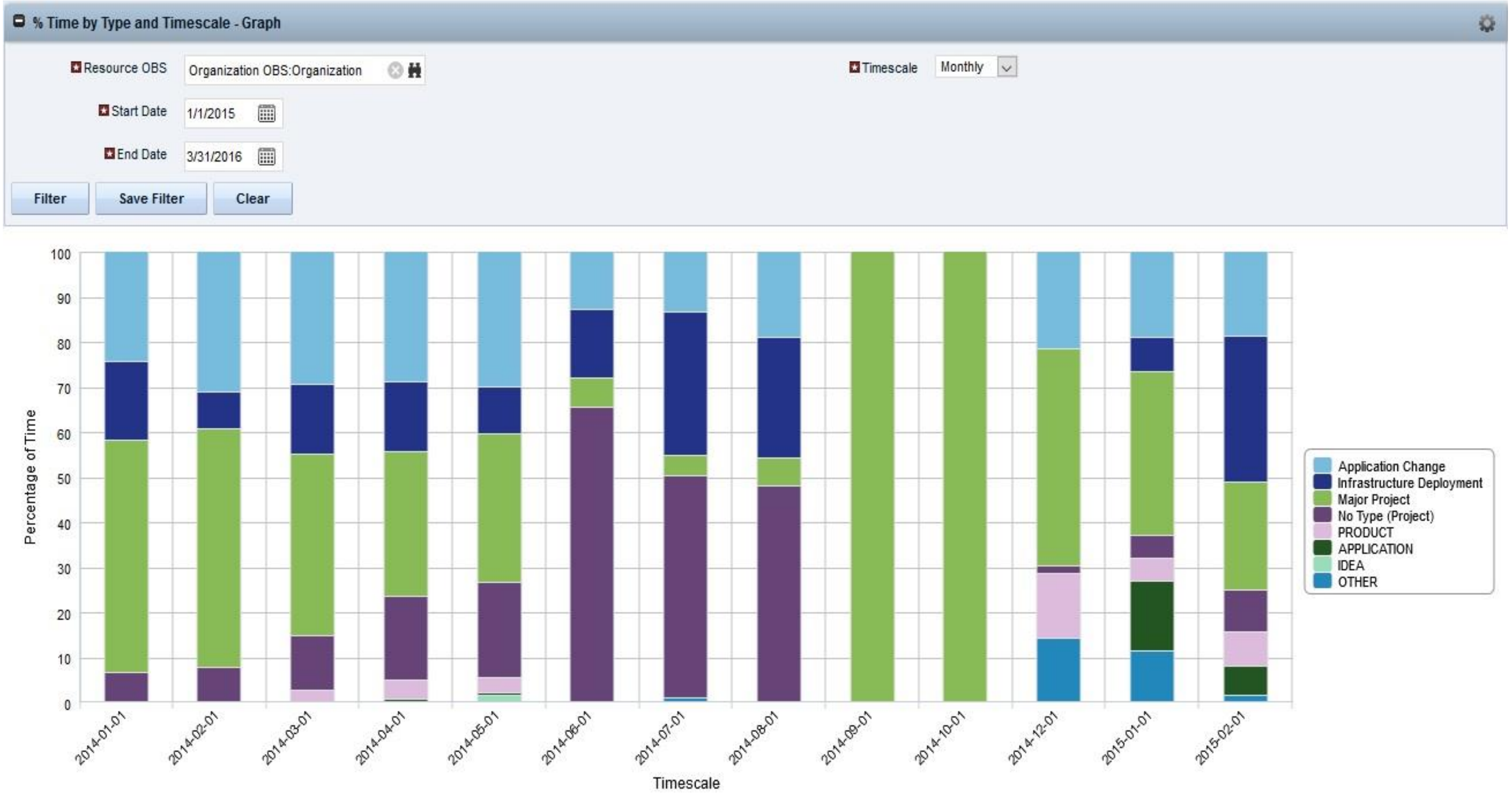
regoXchange – Enterprise Health







regoXchange – Time By Type



% Time by Type and Timescale - Graph

Resource OBS: Organization OBS:Organization

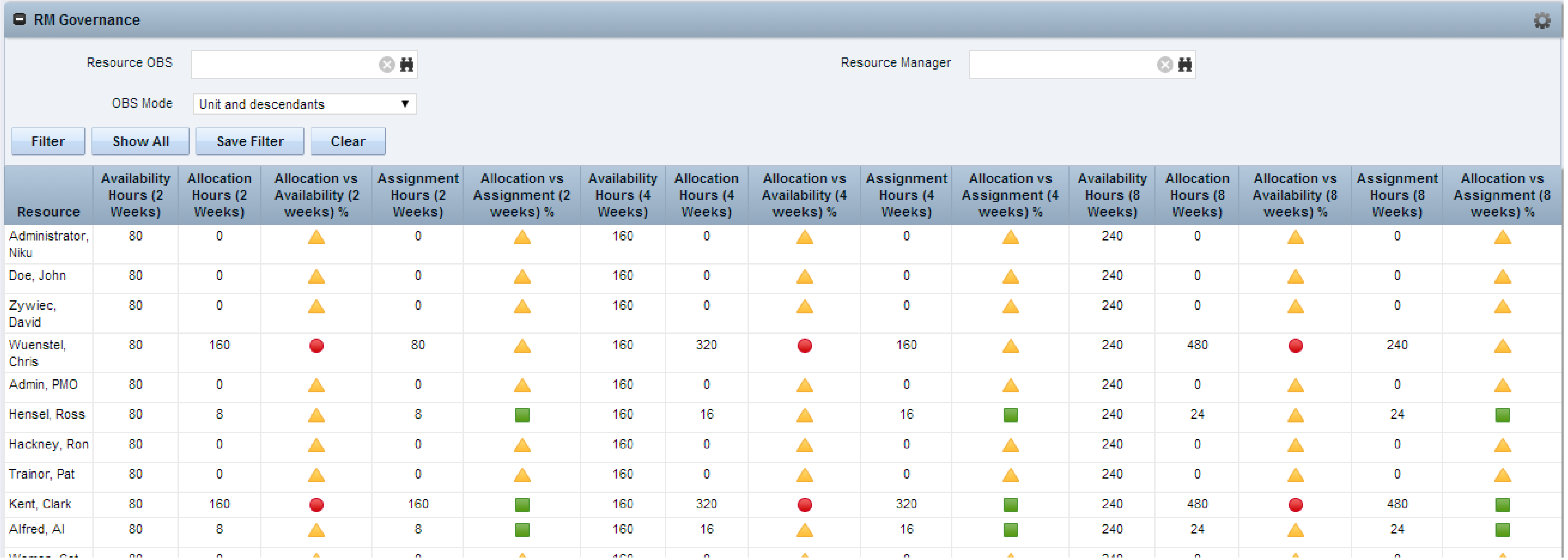
Start Date: 1/1/2015

End Date: 3/31/2016

Timescale: Monthly

Filter
Save Filter
Clear
Percentage of Time
100
90
80
70
60
50
40
30
20
10
0
2014-01-01
2014-02-01
2014-03-01
2014-04-01
2014-05-01
2014-06-01
2014-07-01
2014-08-01
2014-09-01
2014-10-01
2014-12-01
2015-01-01
2015-02-01
Timescale
Application Change
Infrastructure Deployment
Major Project
No Type (Project)
PRODUCT
APPLICATION
IDEA
OTHER

regoXchange – Resource Management



RM Governance

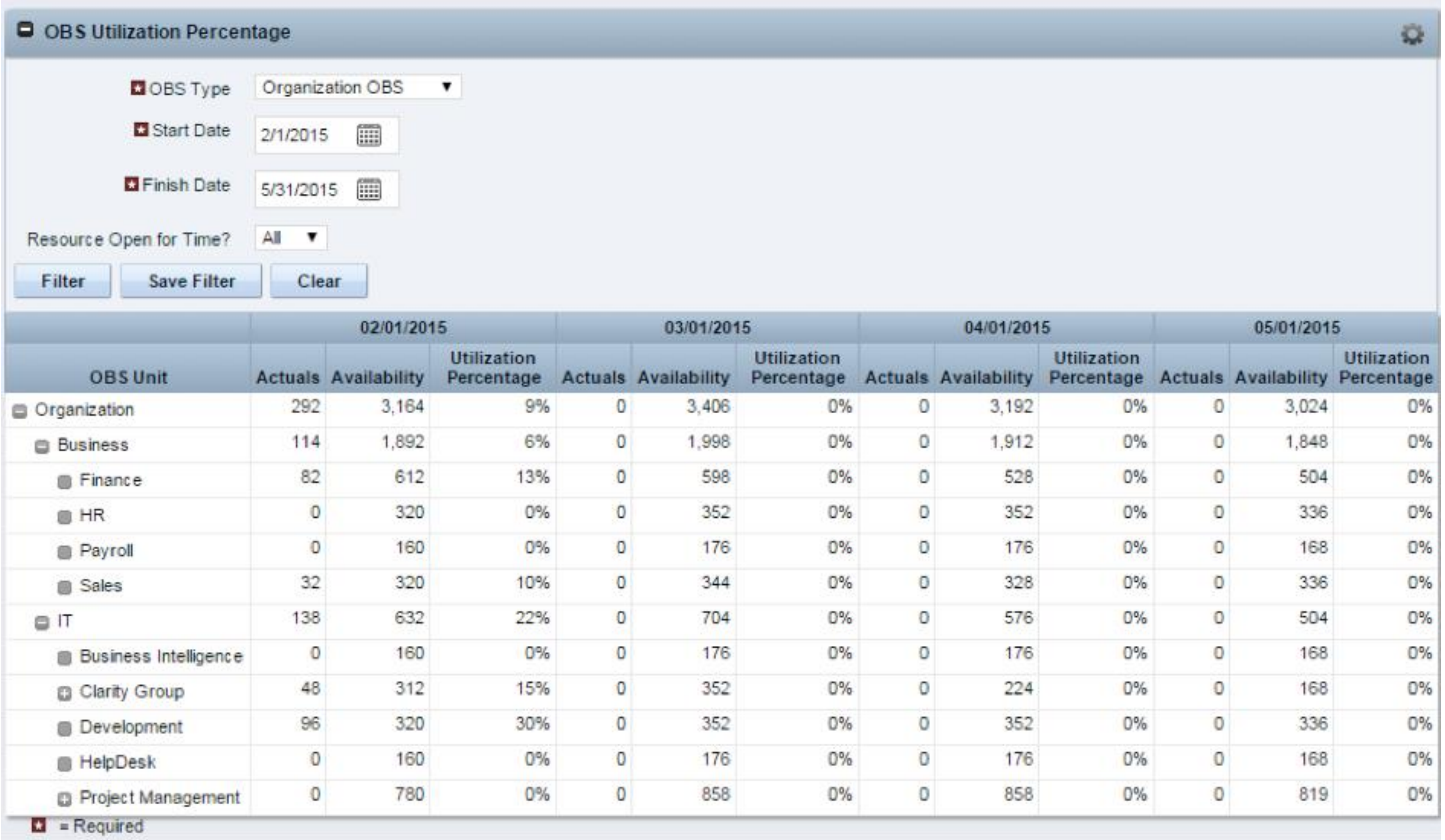
Resource OBS:

Resource Manager:

OBS Mode: Unit and descendants

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

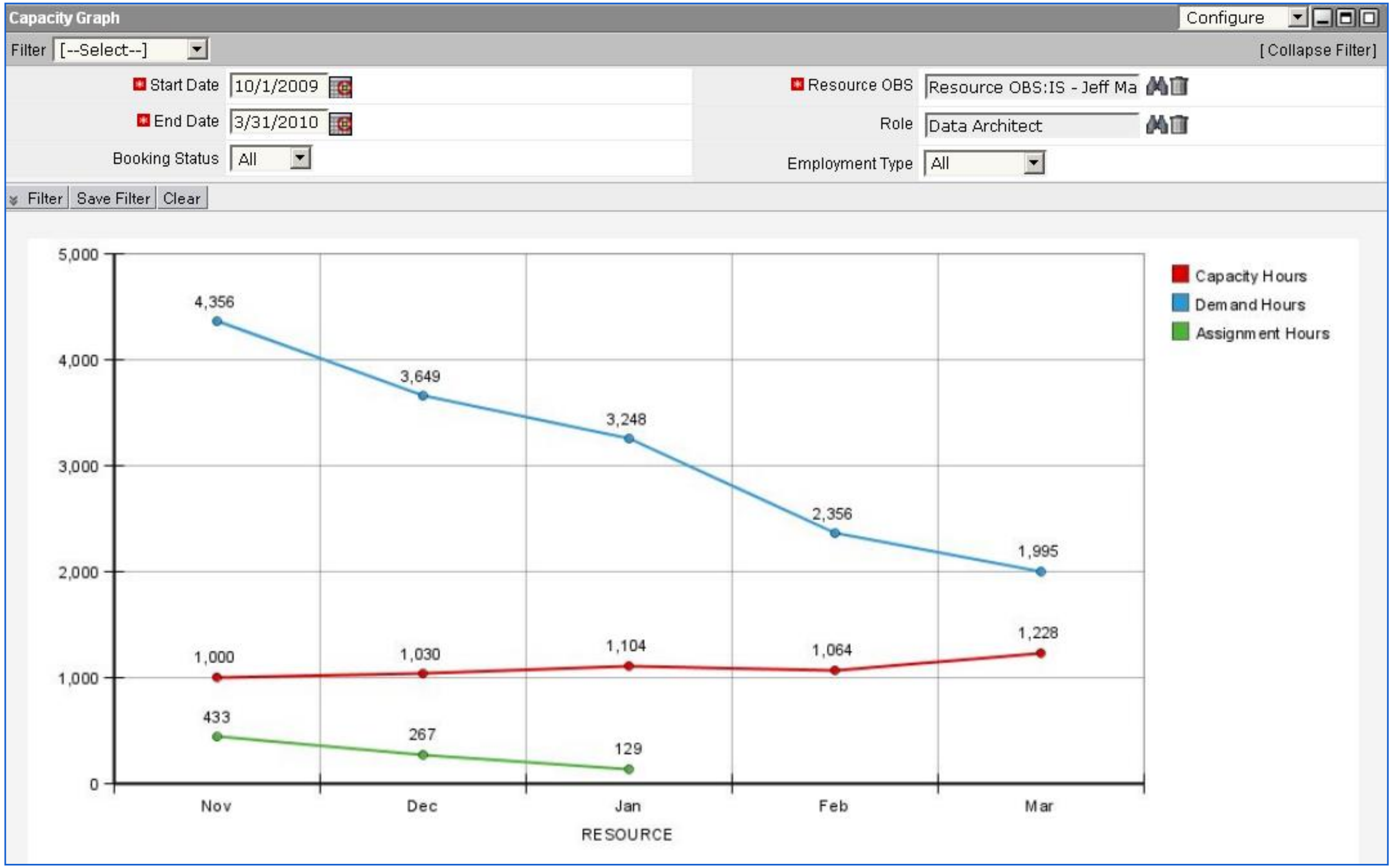


OBS Type: Organization OBS
Start Date: 2/1/2015
Finish Date: 5/31/2015
Resource Open for Time?: All

	02/01/2015			03/01/2015			04/01/2015			05/01/2015		
OBS Unit	Actuals	Availability	Utilization Percentage	Actuals	Availability	Utilization Percentage	Actuals	Availability	Utilization Percentage	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



Capacity Graph

Filter [--Select--]

Start Date 10/1/2009

End Date 3/31/2010

Booking Status All

Resource OBS Resource OBS:IS - Jeff Ma

Role Data Architect

Employment Type All

Configure
[Collapse Filter]
Filter
Save Filter
Clear
5,000
4,000
3,000
2,000
1,000
0
4,356
3,649
3,248
2,356
1,995
1,000
1,030
1,104
1,064
1,228
433
267
129
Nov
Dec
Jan
Feb
Mar
RESOURCE
🟥 Capacity Hours
🟦 Demand Hours
🟩 Assignment Hours

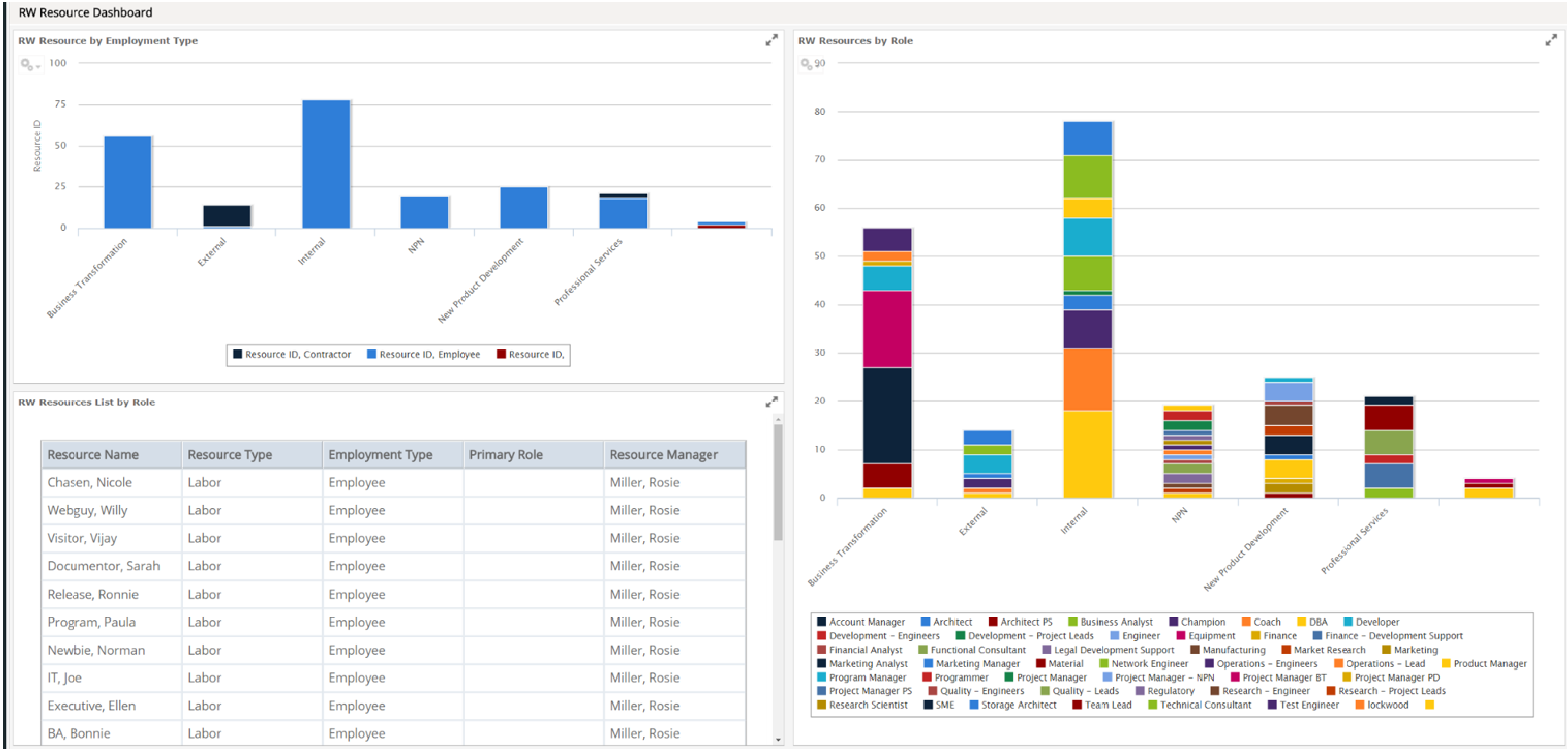
Custom Dashboards

regoUniversity 2021
VIRTUAL

Let Rego be your guide.

Resource Management

Jaspersoft Dashboards



RW Resource Dashboard

RW Resource by Employment Type

100
75
50
25
0
Resource ID
Business Transformation
External
Internal
NPN
New Product Development
Professional Services
Resource ID, Contractor
Resource ID, Employee
Resource ID,

RW Resources by Role

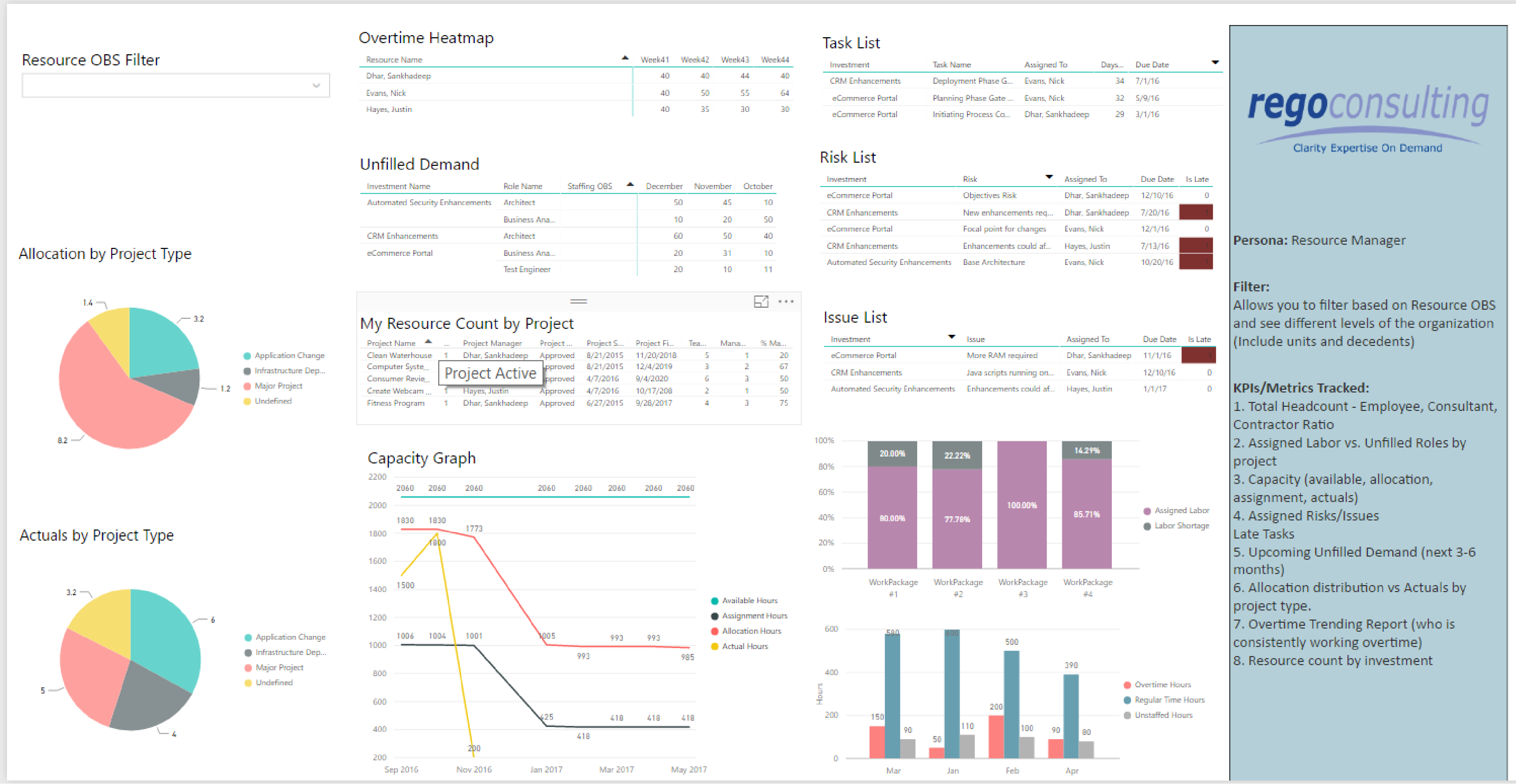
90
80
70
60
50
40
30
20
10
0
Business Transformation
External
Internal
NPN
New Product Development
Professional Services
Account Manager
Architect
Architect PS
Business Analyst
Champion
Coach
DBA
Developer
Development - Engineers
Development - Project Leads
Engineer
Equipment
Finance
Finance - Development Support
Financial Analyst
Functional Consultant
Legal Development Support
Manufacturing
Market Research
Marketing
Marketing Analyst
Marketing Manager
Material
Network Engineer
Operations - Engineers
Operations - Lead
Product Manager
Program Manager
Programmer
Project Manager
Project Manager - NPN
Project Manager BT
Project Manager PD
Project Manager PS
Quality - Engineers
Quality - Leads
Regulatory
Research - Engineer
Research - Project Leads
Research Scientist
SME
Storage Architect
Team Lead
Technical Consultant
Test Engineer
lockwood

RW Resources List by Role

Resource Name	Resource Type	Employment Type	Primary Role	Resource Manager
Chasen, Nicole	Labor	Employee		Miller, Rosie
Webguy, Willy	Labor	Employee		Miller, Rosie
Visitor, Vijay	Labor	Employee		Miller, Rosie
Documentor, Sarah	Labor	Employee		Miller, Rosie
Release, Ronnie	Labor	Employee		Miller, Rosie
Program, Paula	Labor	Employee		Miller, Rosie
Newbie, Norman	Labor	Employee		Miller, Rosie
IT, Joe	Labor	Employee		Miller, Rosie
Executive, Ellen	Labor	Employee		Miller, Rosie
BA, Bonnie	Labor	Employee		Miller, Rosie

Resource Management

PowerBI


Resource OBS Filter
Allocation by Project Type
1.4
3.2
1.2
8.2
Application Change
Infrastructure Dep...
Major Project
Undefined
Actuals by Project Type
3.2
6
5
4
Application Change
Infrastructure Dep...
Major Project
Undefined
Project Active
Capacity Graph
2200
2000
1800
1600
1400
1200
1000
800
600
400
200
2060
1830
1773
1800
1500
1006
1004
1001
1005
993
985
425
418
200
Sep 2016
Nov 2016
Jan 2017
Mar 2017
May 2017
Available Hours
Assignment Hours
Allocation Hours
Actual Hours
100%
80%
60%
40%
20%
0%
20.00%
80.00%
22.22%
77.78%
100.00%
14.29%
85.71%
WorkPackage #1
WorkPackage #2
WorkPackage #3
WorkPackage #4
Assigned Labor
Labor Shortage
600
400
200
0
Hours
580
150
90
50
110
500
200
100
390
90
80
Mar
Jan
Feb
Apr
Overtime Hours
Regular Time Hours
Unstaffed Hours

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

My Resource Count by Project

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

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

regoconsulting
Clarity Expertise On Demand

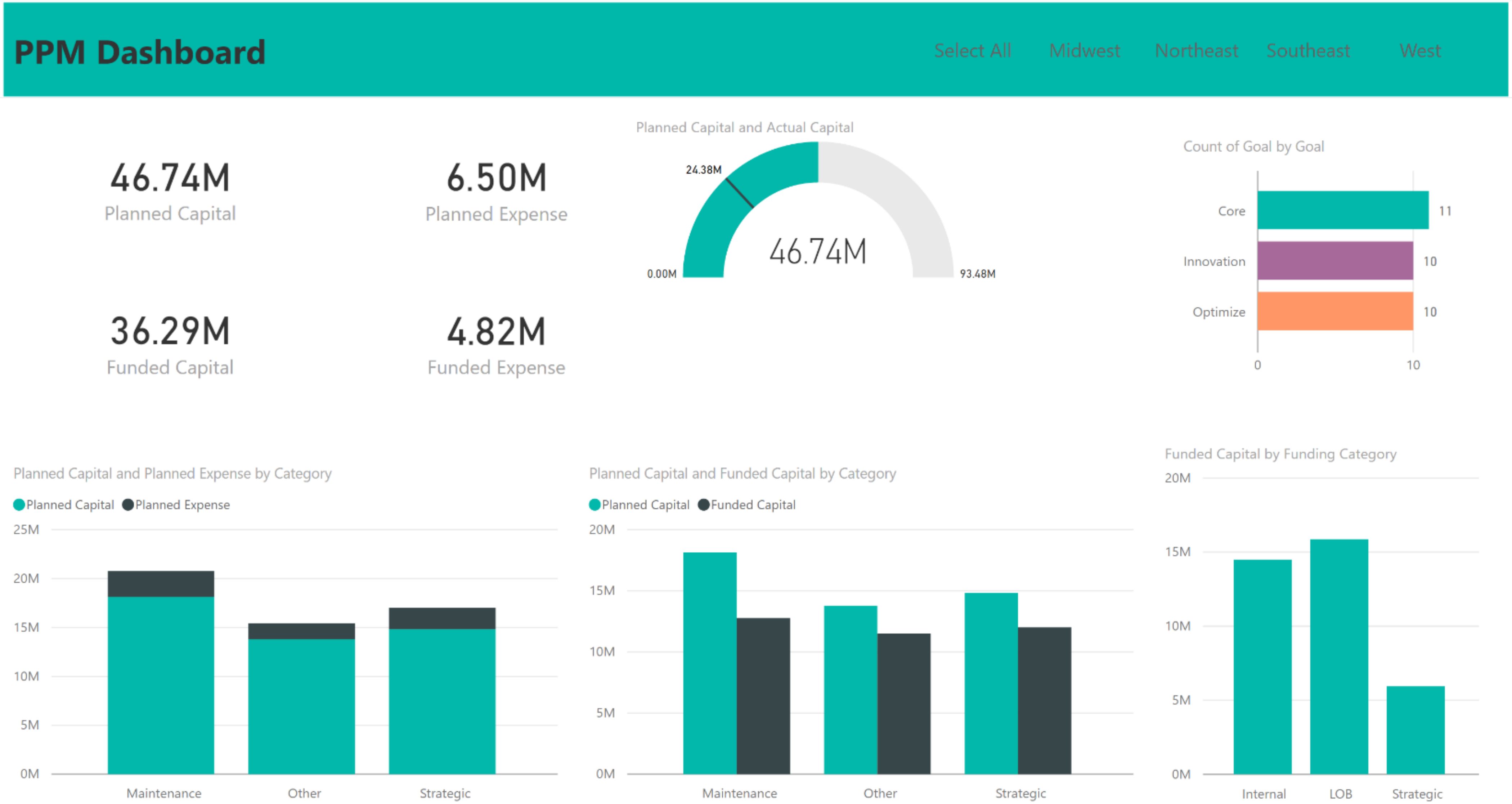
Persona: Resource Manager

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

Financial Management

PowerBI



PPM Dashboard

46.74M Planned Capital

6.50M Planned Expense

36.29M Funded Capital

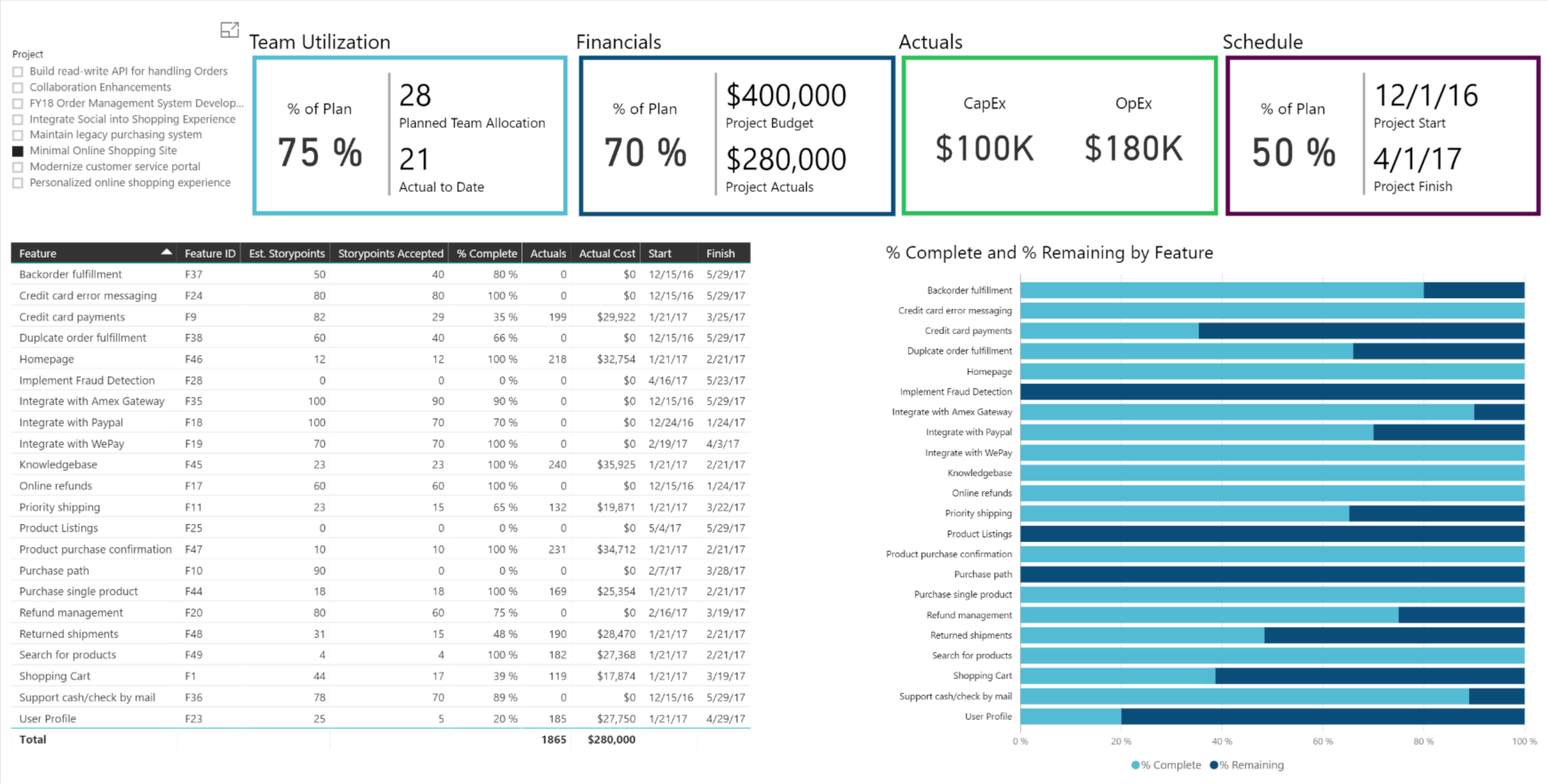
4.82M Funded Expense

Select All
Midwest
Northeast
Southeast
West
Planned Capital and Actual Capital
24.38M
46.74M
0.00M
93.48M
Count of Goal by Goal
Core
11
Innovation
10
Optimize
10
0
10
Planned Capital and Planned Expense by Category
● Planned Capital
● Planned Expense
25M
20M
15M
10M
5M
0M
Maintenance
Other
Strategic
Planned Capital and Funded Capital by Category
● Planned Capital
● Funded Capital
20M
15M
10M
5M
0M
Maintenance
Other
Strategic
Funded Capital by Funding Category
20M
15M
10M
5M
0M
Internal
LOB
Strategic

Let Rego be your guide.

Project Management

PowerBI



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

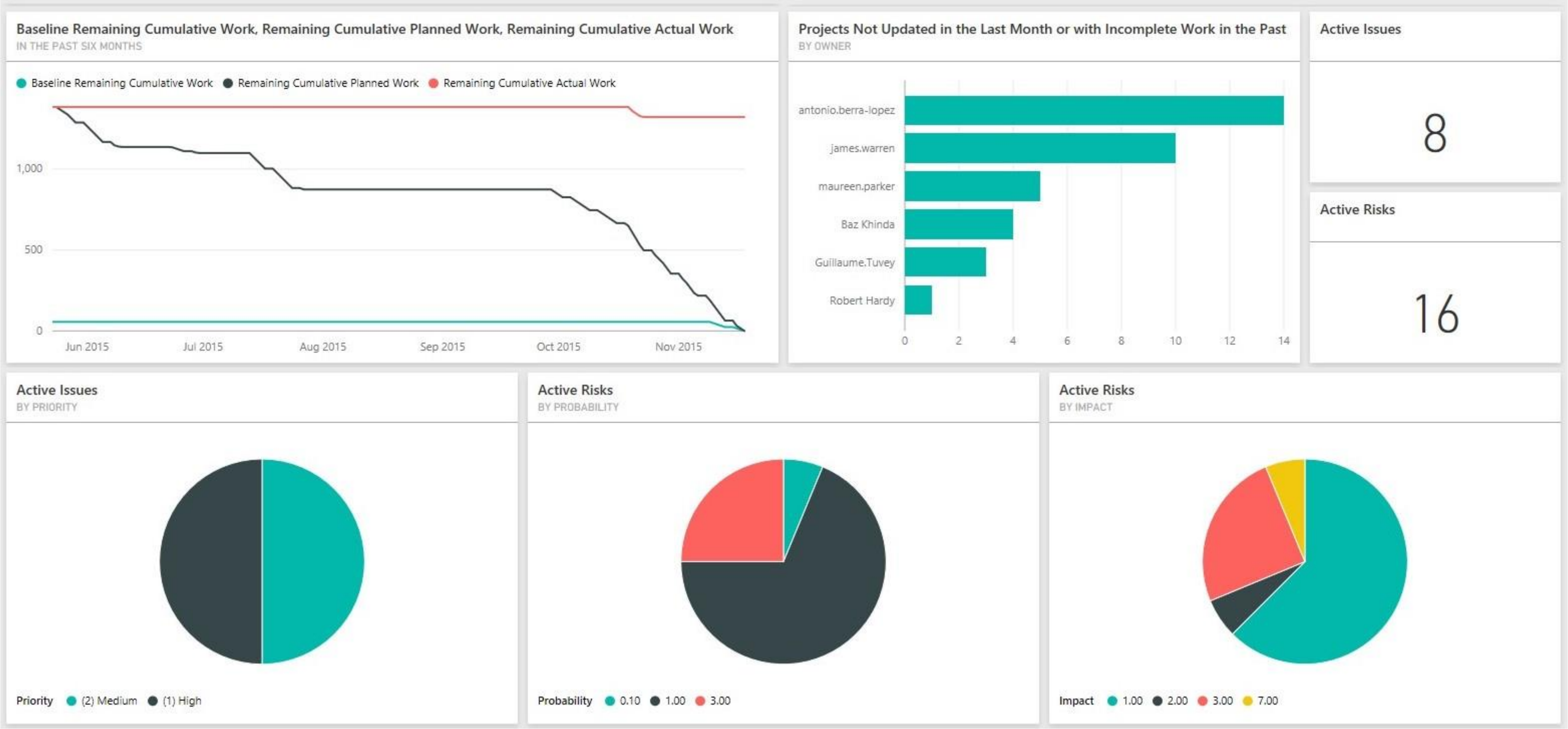
Feature	Feature ID	Est. Storypoints	Storypoints Accepted	% Complete	Actuals	Actual Cost	Start	Finish
Backorder fulfillment	F37	50	40	80 %	0	$0	12/15/16	5/29/17
Credit card error messaging	F24	80	80	100 %	0	$0	12/15/16	5/29/17
Credit card payments	F9	82	29	35 %	199	$29,922	1/21/17	3/25/17
Duplcate order 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**		

% Complete and % Remaining by Feature

Backorder fulfillment
Credit card error messaging
Credit card payments
Duplcate order fulfillment
Homepage
Implement Fraud Detection
Integrate with Amex Gateway
Integrate with Paypal
Integrate with WePay
Knowledgebase
Online refunds
Priority shipping
Product Listings
Product purchase confirmation
Purchase path
Purchase single product
Refund management
Returned shipments
Search for products
Shopping Cart
Support cash/check by mail
User Profile
0 %
20 %
40 %
60 %
80 %
100 %
● % Complete
● % Remaining

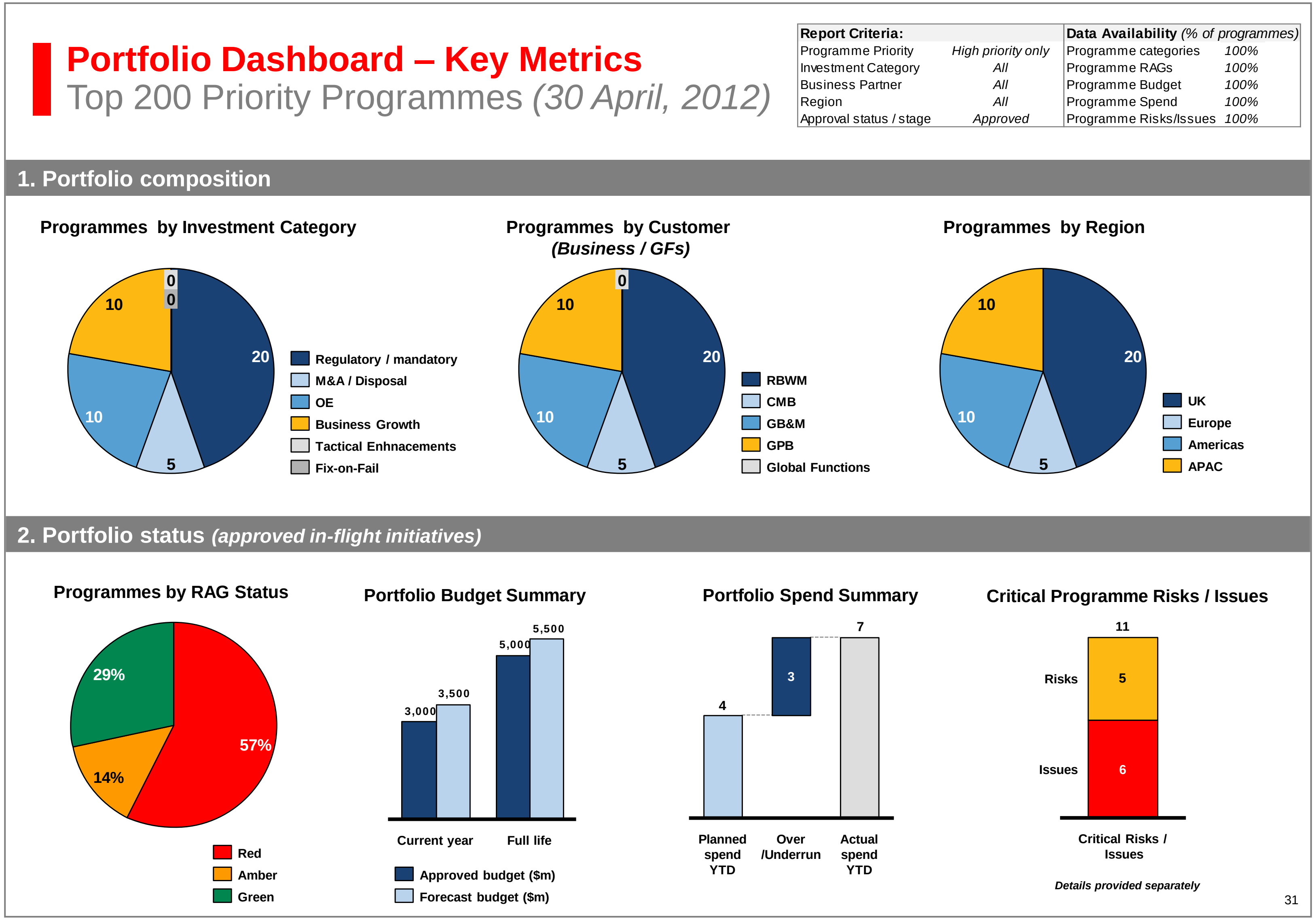
Program Management

PowerBI


Baseline Remaining Cumulative Work, Remaining Cumulative Planned Work, Remaining Cumulative Actual Work
IN THE PAST SIX MONTHS
Baseline Remaining Cumulative Work
Remaining Cumulative Planned Work
Remaining Cumulative Actual Work
1,000
500
0
Jun 2015
Jul 2015
Aug 2015
Sep 2015
Oct 2015
Nov 2015
Projects Not Updated in the Last Month or with Incomplete Work in the Past
BY OWNER
antonio.berra-lopez
james.warren
maureen.parker
Baz Khinda
Guillaume.Tuvey
Robert Hardy
0
2
4
6
8
10
12
14
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 Management

Jaspersoft
Studio



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

0
0
10
20
10
5
Regulatory / mandatory
M&A / Disposal
OE
Business Growth
Tactical Enhnacements
Fix-on-Fail

Programmes by Customer *(Business / GFs)*

0
10
20
10
5
RBWM
CMB
GB&M
GPB
Global Functions

Programmes by Region

10
20
10
5
UK
Europe
Americas
APAC

2. Portfolio status *(approved in-flight initiatives)*

Programmes by RAG Status

29%
57%
14%
Red
Amber
Green

Portfolio Budget Summary

3,000
3,500
5,000
5,500
Current year
Full life
Approved budget ($m)
Forecast budget ($m)

Portfolio Spend Summary

4
3
7
Planned spend YTD
Over /Underrun
Actual spend YTD

Critical Programme Risks / Issues

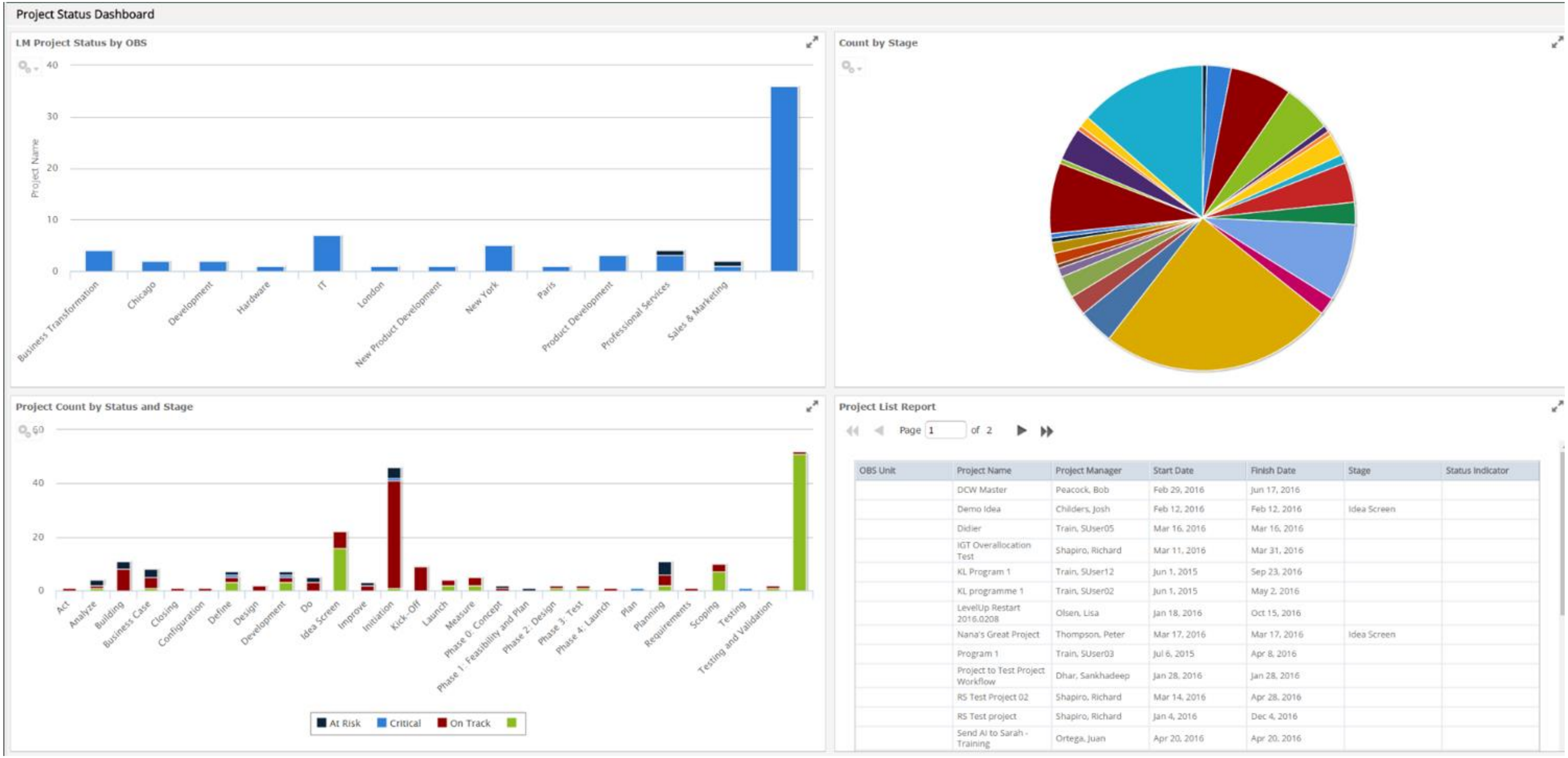
11
Risks
5
Issues
6
Critical Risks / Issues

Details provided separately

31

Portfolio Management

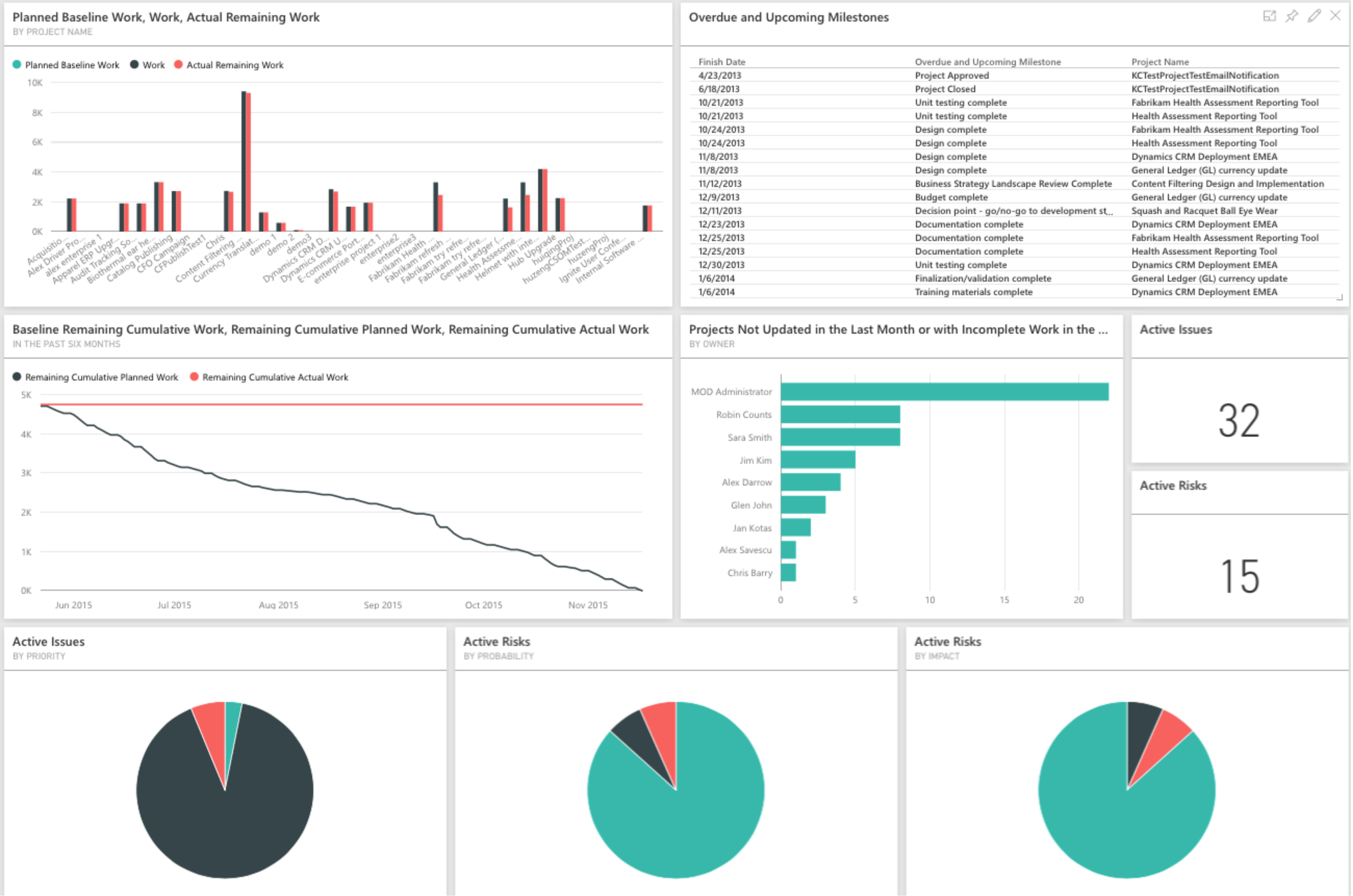
Jaspersoft Dashboard


Project Status Dashboard
LM Project Status by OBS
40
30
20
10
0
Project Name
Business Transformation
Chicago
Development
Hardware
IT
London
New Product Development
New York
Paris
Product Development
Professional Services
Sales & Marketing
Count by Stage
Project Count by Status and Stage
60
40
20
0
Act
Analyze
Building
Business Case
Closing
Configuration
Define
Design
Development
Do
Idea Screen
Improve
Initiation
Kick-Off
Launch
Measure
Phase 0: Concept
Phase 1: Feasibility and Plan
Phase 2: Design
Phase 3: Test
Phase 4: Launch
Plan
Planning
Requirements
Scoping
Testing
Testing and Validation
At Risk
Critical
On Track
Project List Report
Page 1 of 2

OBS Unit	Project Name	Project Manager	Start Date	Finish Date	Stage	Status Indicator
	DCW Master	Peacock, Bob	Feb 29, 2016	Jun 17, 2016		
	Demo Idea	Childers, Josh	Feb 12, 2016	Feb 12, 2016	Idea Screen	
	Didier	Train, SUser05	Mar 16, 2016	Mar 16, 2016		
	IGT Overallocation Test	Shapiro, Richard	Mar 11, 2016	Mar 31, 2016		
	KL Program 1	Train, SUser12	Jun 1, 2015	Sep 23, 2016		
	KL programme 1	Train, SUser02	Jun 1, 2015	May 2, 2016		
	LevelUp Restart 2016.0208	Olsen, Lisa	Jan 18, 2016	Oct 15, 2016		
	Nana's Great Project	Thompson, Peter	Mar 17, 2016	Mar 17, 2016	Idea Screen	
	Program 1	Train, SUser03	Jul 6, 2015	Apr 8, 2016		
	Project to Test Project Workflow	Dhar, Sankhadeep	Jan 28, 2016	Jan 28, 2016		
	RS Test Project 02	Shapiro, Richard	Mar 14, 2016	Apr 28, 2016		
	RS Test project	Shapiro, Richard	Jan 4, 2016	Dec 4, 2016		
	Send AI to Sarah - Training	Ortega, Juan	Apr 20, 2016	Apr 20, 2016		

Portfolio Management

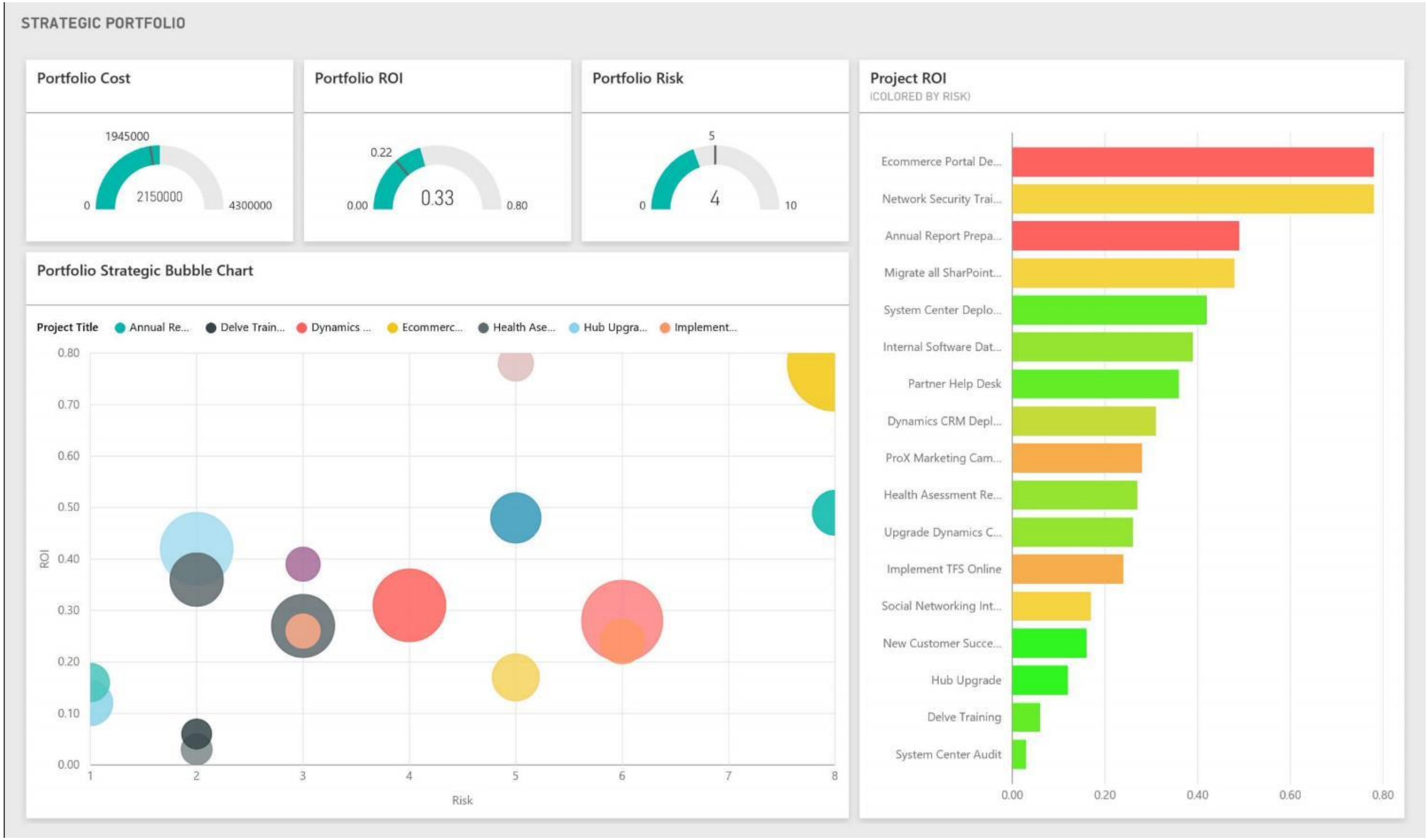
PowerBI


Planned Baseline Work, Work, Actual Remaining Work
BY PROJECT NAME
● Planned Baseline Work ● Work ● Actual Remaining Work
10K
8K
6K
4K
2K
0K
Acquisitio...
Alex Driver Pro...
alex enterprise 1
Apparel ERP Upgr...
Audit Tracking So...
Biothermal ear he...
Catalog Publishing
CFO Campaign
CFPublishTest1
Chris
Content Filtering ...
Currency Translat...
demo 1
demo 2
demo3
Dynamics CRM D...
Dynamics CRM U...
E-commerce Port...
enterprise project 1
enterprise2
enterprise3
Fabrikam Health ...
Fabrikam refresh ...
Fabrikam try refre...
Fabrikam try refre...
General Ledger (...
Health Assessme...
Helmet with inte...
Hub Upgrade
huiqingProj
huzengCSOMTest...
huzengProj
Ignite User Confe...
Internal Software ...
Overdue and Upcoming Milestones
Baseline Remaining Cumulative Work, Remaining Cumulative Planned Work, Remaining Cumulative Actual Work
IN THE PAST SIX MONTHS
● Remaining Cumulative Planned Work ● Remaining Cumulative Actual Work
5K
4K
3K
2K
1K
0K
Jun 2015
Jul 2015
Aug 2015
Sep 2015
Oct 2015
Nov 2015
Projects Not Updated in the Last Month or with Incomplete Work in the ...
BY OWNER
MOD Administrator
Robin Counts
Sara Smith
Jim Kim
Alex Darrow
Glen John
Jan Kotas
Alex Savescu
Chris Barry
0
5
10
15
20
Active Issues
32
Active Risks
15
Active Issues
BY PRIORITY
Active Risks
BY PROBABILITY
Active Risks
BY IMPACT

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

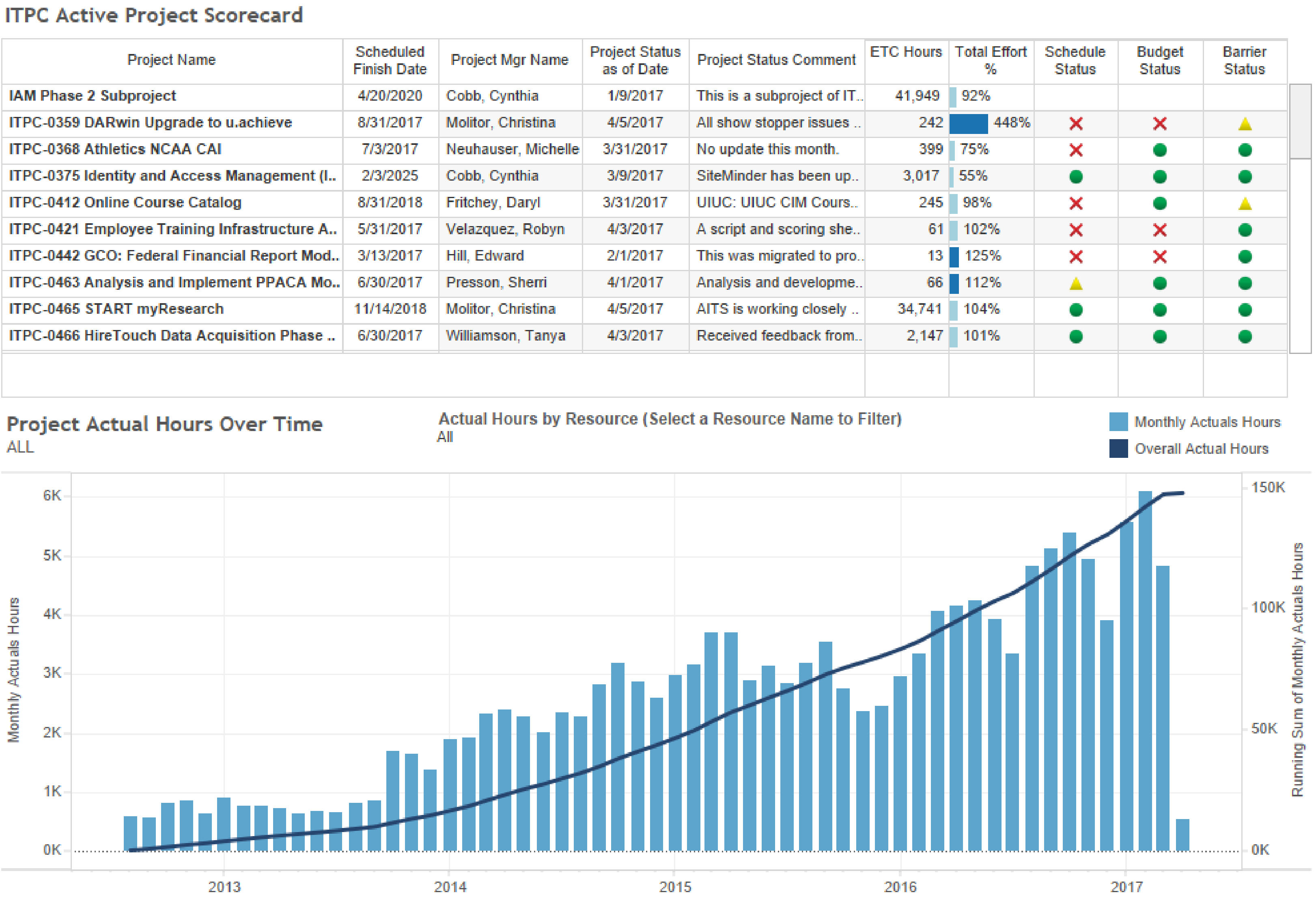
Portfolio Management

PowerBI


STRATEGIC PORTFOLIO
Portfolio Cost
1945000
0
2150000
4300000
Portfolio ROI
0.22
0.00
0.33
0.80
Portfolio Risk
5
0
4
10
Project ROI
(COLORED BY RISK)
Ecommerce Portal De...
Network Security Trai...
Annual Report Prepa...
Migrate all SharPoint...
System Center Deplo...
Internal Software Dat...
Partner Help Desk
Dynamics CRM Depl...
ProX Marketing Cam...
Health Asessment Re...
Upgrade Dynamics C...
Implement TFS Online
Social Networking Int...
New Customer Succe...
Hub Upgrade
Delve Training
System Center Audit
0.00
0.20
0.40
0.60
0.80
Portfolio Strategic Bubble Chart
Project Title
Annual Re...
Delve Train...
Dynamics ...
Ecommerc...
Health Ase...
Hub Upgra...
Implement...
ROI
0.80
0.70
0.60
0.50
0.40
0.30
0.20
0.10
0.00
1
2
3
4
5
6
7
8
Risk

Portfolio Management

Tableau



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

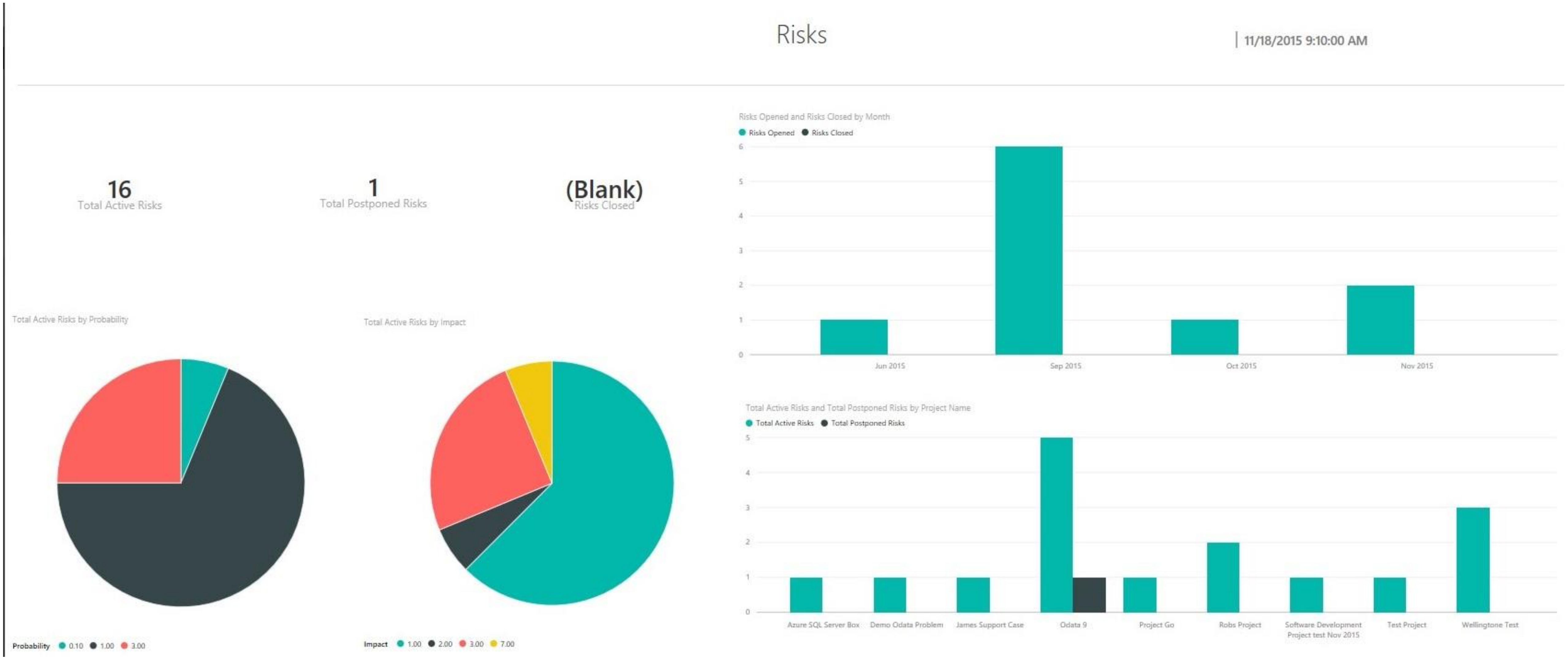
Monthly Actuals Hours
Overall Actual Hours
Monthly Actuals Hours
6K
5K
4K
3K
2K
1K
0K
150K
100K
50K
0K
Running Sum of Monthly Actuals Hours
2013
2014
2015
2016
2017

Let Rego be your guide.

regoUniversity2021

Risk Management

PowerBI



Risks

| 11/18/2015 9:10:00 AM

16
Total Active Risks

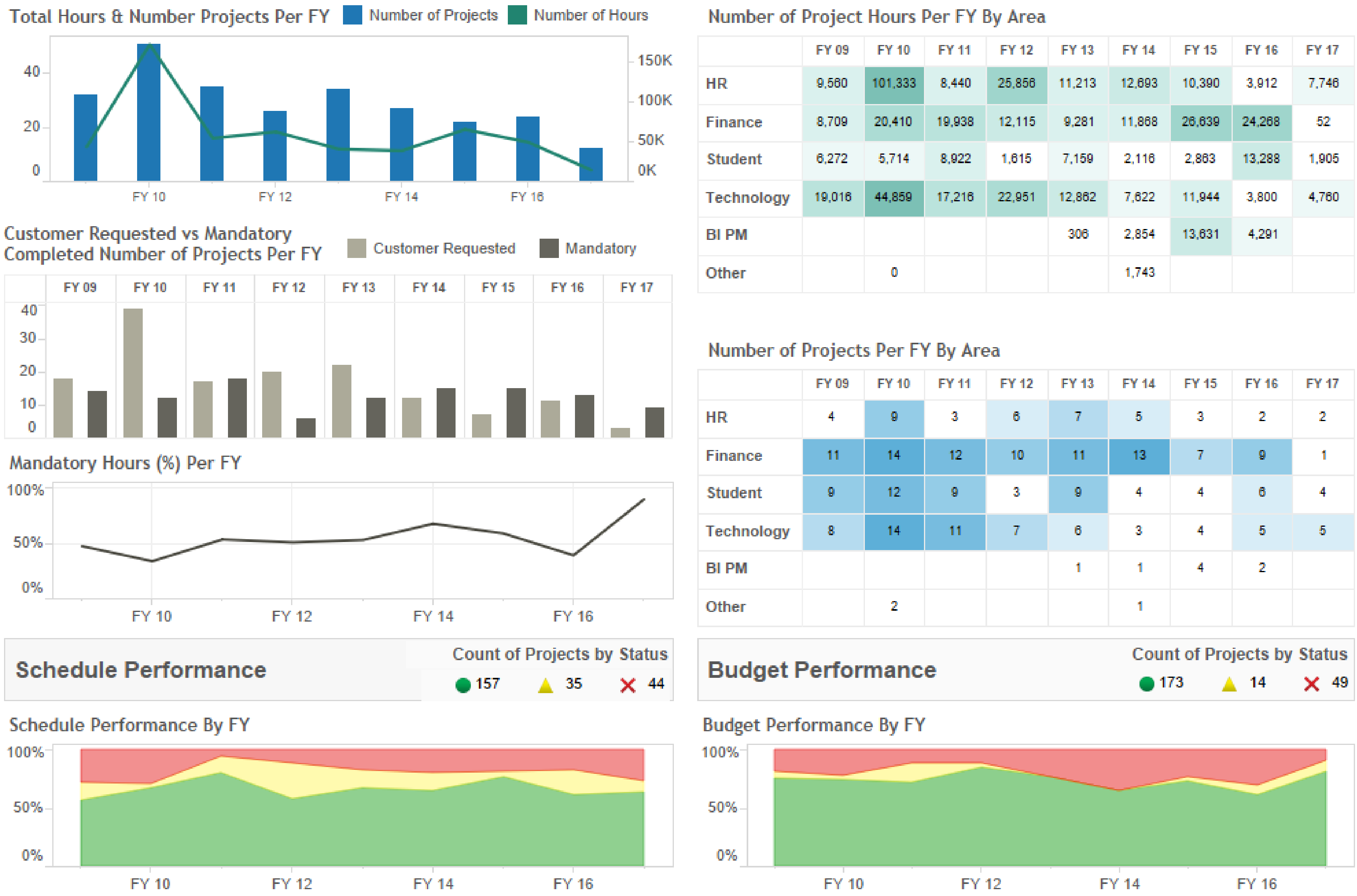
1
Total Postponed Risks

(Blank)
Risks Closed

Risks Opened and Risks Closed by Month
● Risks Opened ● Risks Closed
6
5
4
3
2
1
0
Jun 2015
Sep 2015
Oct 2015
Nov 2015
Total Active Risks by Probability
Probability ● 0.10 ● 1.00 ● 3.00
Total Active Risks by Impact
Impact ● 1.00 ● 2.00 ● 3.00 ● 7.00
Total Active Risks and Total Postponed Risks by Project Name
● Total Active Risks ● Total Postponed Risks
5
4
3
2
1
0
Azure SQL Server Box
Demo Odata Problem
James Support Case
Odata 9
Project Go
Robs Project
Software Development Project test Nov 2015
Test Project
Wellingtone Test

Executive Dashboards

Tableau


Total Hours & Number Projects Per FY
Number of Projects
Number of Hours
40
20
0
150K
100K
50K
0K
FY 10
FY 12
FY 14
FY 16
Customer Requested vs Mandatory Completed Number of Projects Per FY
Customer Requested
Mandatory
FY 09
FY 10
FY 11
FY 12
FY 13
FY 14
FY 15
FY 16
FY 17
40
30
20
10
0
Mandatory Hours (%) Per FY
100%
50%
0%
FY 10
FY 12
FY 14
FY 16
Schedule Performance By FY
100%
50%
0%
FY 10
FY 12
FY 14
FY 16
Budget Performance By FY
100%
50%
0%
FY 10
FY 12
FY 14
FY 16

Number of Project Hours Per FY By Area

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

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			

Schedule Performance

Count of Projects by Status

● 157 ▲ 35 ✕ 44

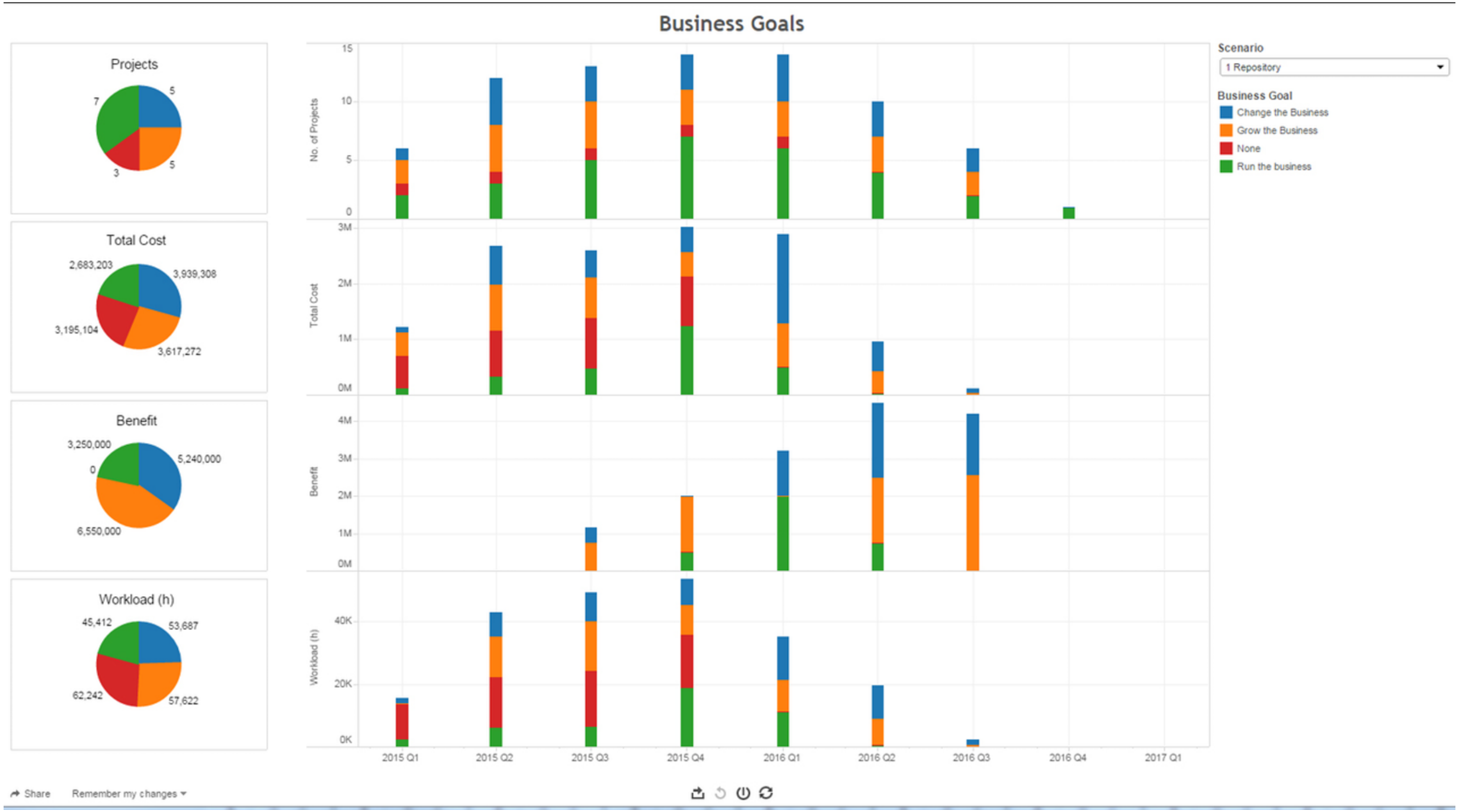
Budget Performance

Count of Projects by Status

● 173 ▲ 14 ✕ 49

Executive Dashboards

Tableau



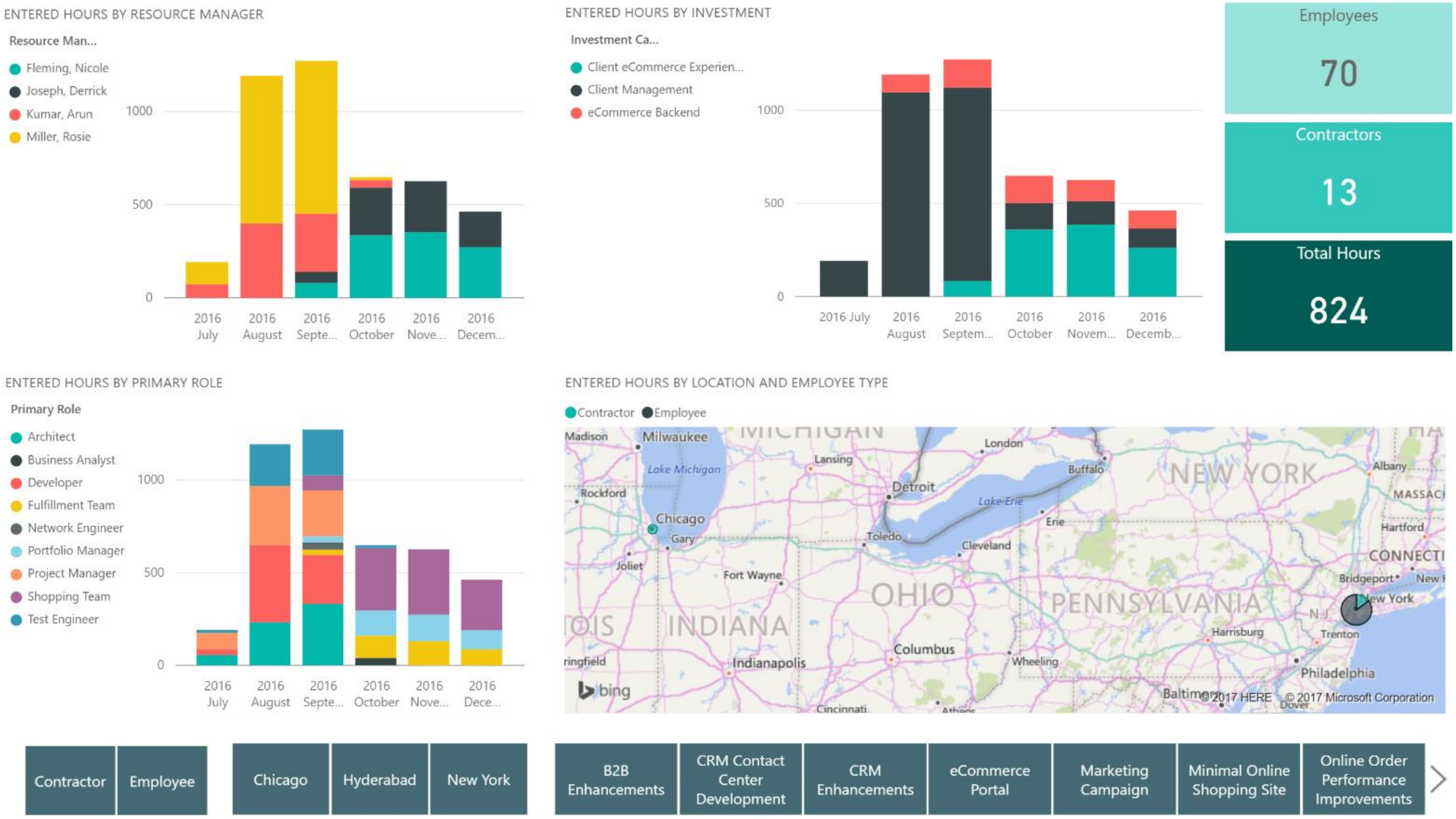
Business Goals

Scenario: 1 Repository

Projects
5
7
3
5
Total Cost
2,683,203
3,939,308
3,195,104
3,617,272
Benefit
3,250,000
0
5,240,000
6,550,000
Workload (h)
45,412
53,687
62,242
57,622
No. of Projects
15
10
5
0
Total Cost
3M
2M
1M
0M
Benefit
4M
3M
2M
1M
0M
Workload (h)
40K
20K
0K
2015 Q1
2015 Q2
2015 Q3
2015 Q4
2016 Q1
2016 Q2
2016 Q3
2016 Q4
2017 Q1
Business Goal
Change the Business
Grow the Business
None
Run the business
Share
Remember my changes

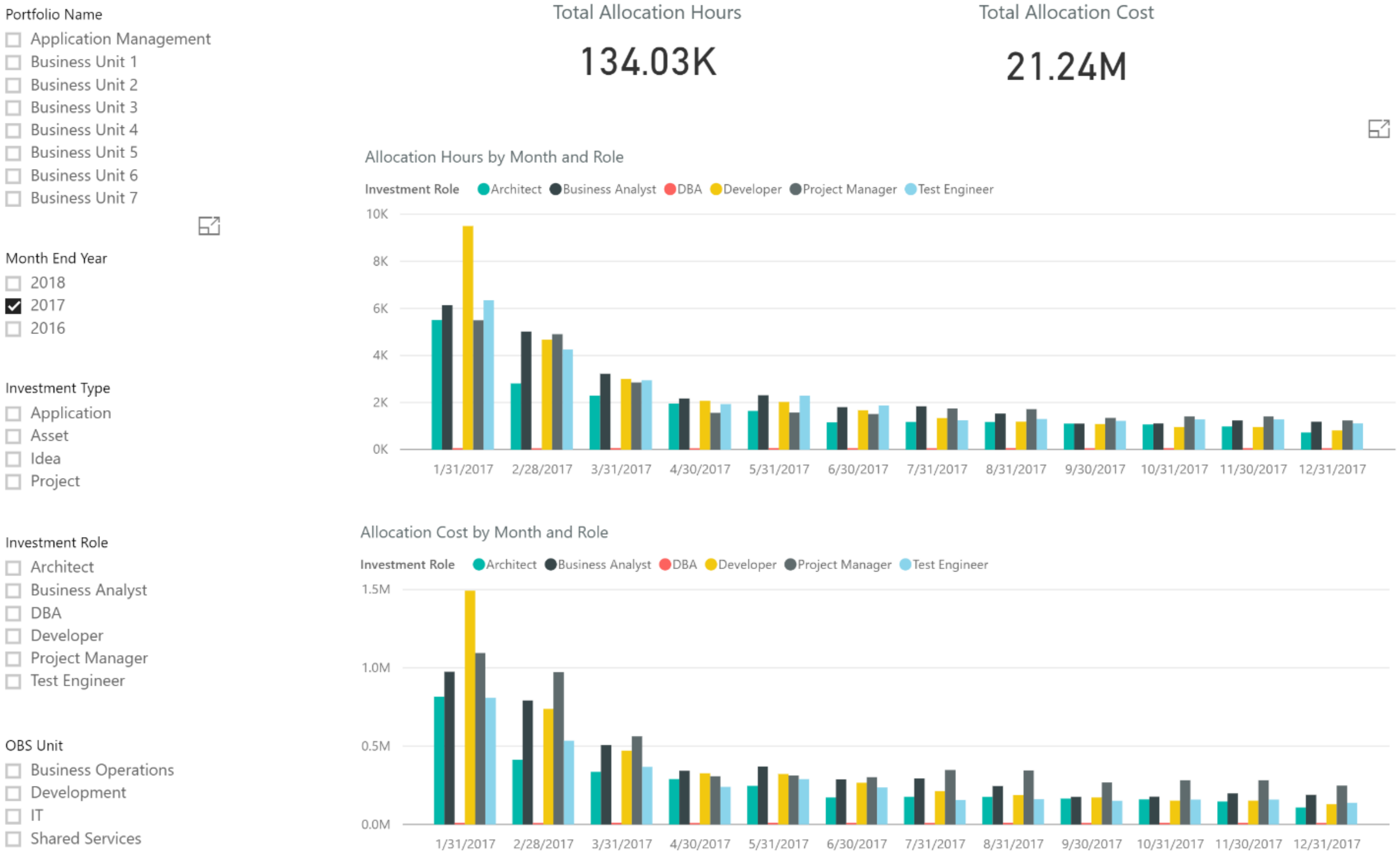
CA PowerBI – Resource

PowerBI


ENTERED HOURS BY RESOURCE MANAGER
Resource Man...
● Fleming, Nicole
● Joseph, Derrick
● Kumar, Arun
● Miller, Rosie
1000
500
0
2016 July
2016 August
2016 Septe...
2016 October
2016 Nove...
2016 Decem...
ENTERED HOURS BY INVESTMENT
Investment Ca...
● Client eCommerce Experien...
● Client Management
● eCommerce Backend
1000
500
0
2016 July
2016 August
2016 Septem...
2016 October
2016 Novem...
2016 Decemb...
Employees
70
Contractors
13
Total Hours
824
ENTERED HOURS BY PRIMARY ROLE
Primary Role
● Architect
● Business Analyst
● Developer
● Fulfillment Team
● Network Engineer
● Portfolio Manager
● Project Manager
● Shopping Team
● Test Engineer
1000
500
0
2016 July
2016 August
2016 Septe...
2016 October
2016 Nove...
2016 Dece...
ENTERED HOURS BY LOCATION AND EMPLOYEE TYPE
● Contractor ● Employee
MICHIGAN
Madison
Milwaukee
Lake Michigan
Lansing
London
Detroit
Buffalo
NEW YORK
Albany
MASSAC
Rockford
Chicago
Gary
Lake Erie
Erie
Toledo
Cleveland
Hartford
CONNECTI
Joliet
Fort Wayne
Bridgeport
New
OHIO
PENNSYLVANIA
New York
N.J.
INDIANA
OIS
Columbus
Harrisburg
Trenton
ringfield
Indianapolis
Wheeling
Philadelphia
bing
Cincinnati
Athens
Baltim
© 2017 HERE
Dover
© 2017 Microsoft Corporation
Contractor
Employee
Chicago
Hyderabad
New York
B2B Enhancements
CRM Contact Center Development
CRM Enhancements
eCommerce Portal
Marketing Campaign
Minimal Online Shopping Site
Online Order Performance Improvements

CA PowerBI – Resource

PowerBI



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

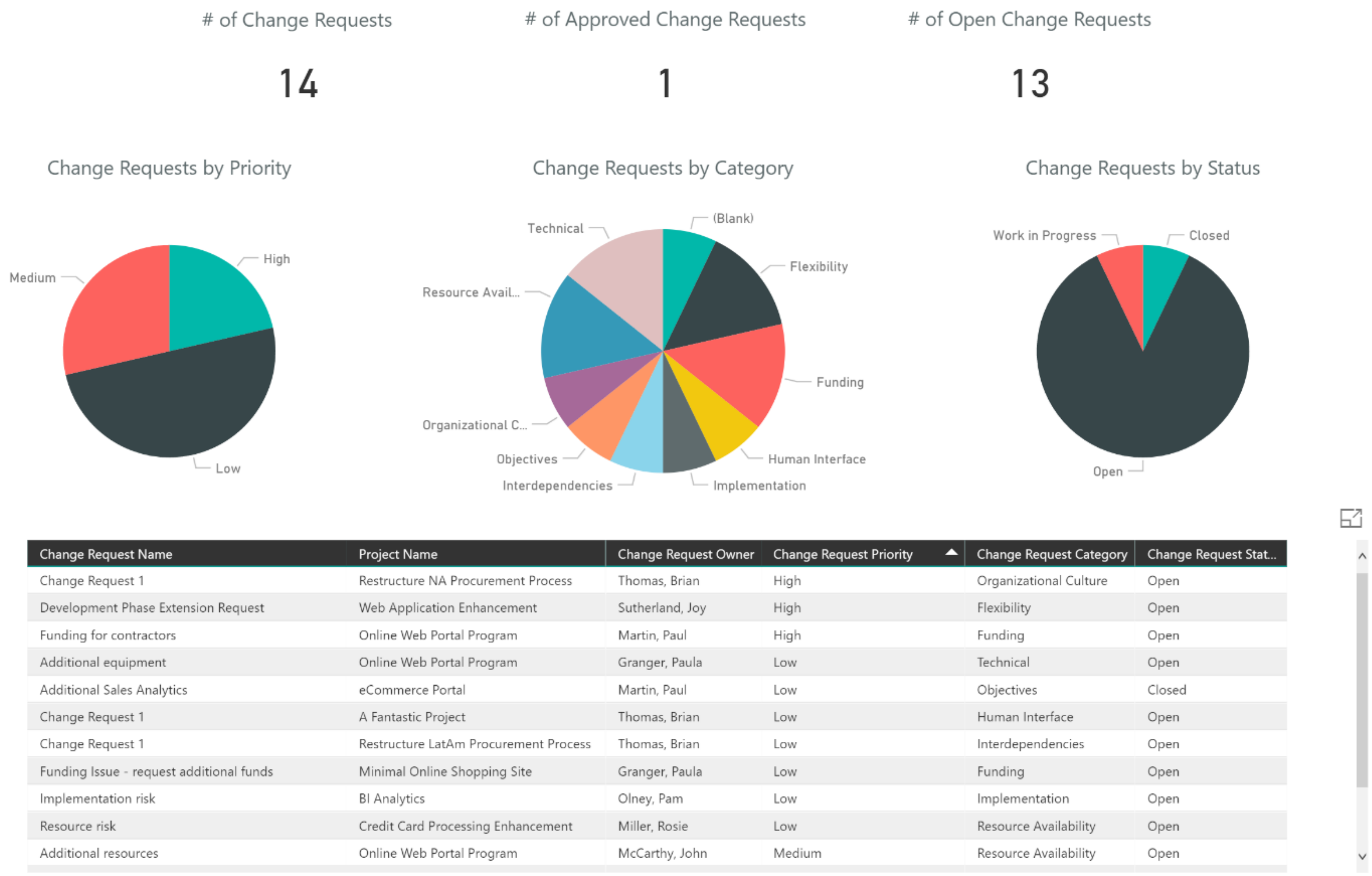
Allocation Hours by Month and Role

Investment Role
● Architect
● Business Analyst
● DBA
● Developer
● Project Manager
● Test Engineer
10K
8K
6K
4K
2K
0K
1/31/2017
2/28/2017
3/31/2017
4/30/2017
5/31/2017
6/30/2017
7/31/2017
8/31/2017
9/30/2017
10/31/2017
11/30/2017
12/31/2017

Allocation Cost by Month and Role

Investment Role
● Architect
● Business Analyst
● DBA
● Developer
● Project Manager
● Test Engineer
1.5M
1.0M
0.5M
0.0M
1/31/2017
2/28/2017
3/31/2017
4/30/2017
5/31/2017
6/30/2017
7/31/2017
8/31/2017
9/30/2017
10/31/2017
11/30/2017
12/31/2017

CA PowerBI – Project/Program – Status



# of Change Requests	# of Approved Change Requests	# of Open Change Requests
14	1	13

Change Requests by Priority

High
Medium
Low

Change Requests by Category

Technical
(Blank)
Flexibility
Resource Avail...
Funding
Organizational C...
Human Interface
Objectives
Interdependencies
Implementation

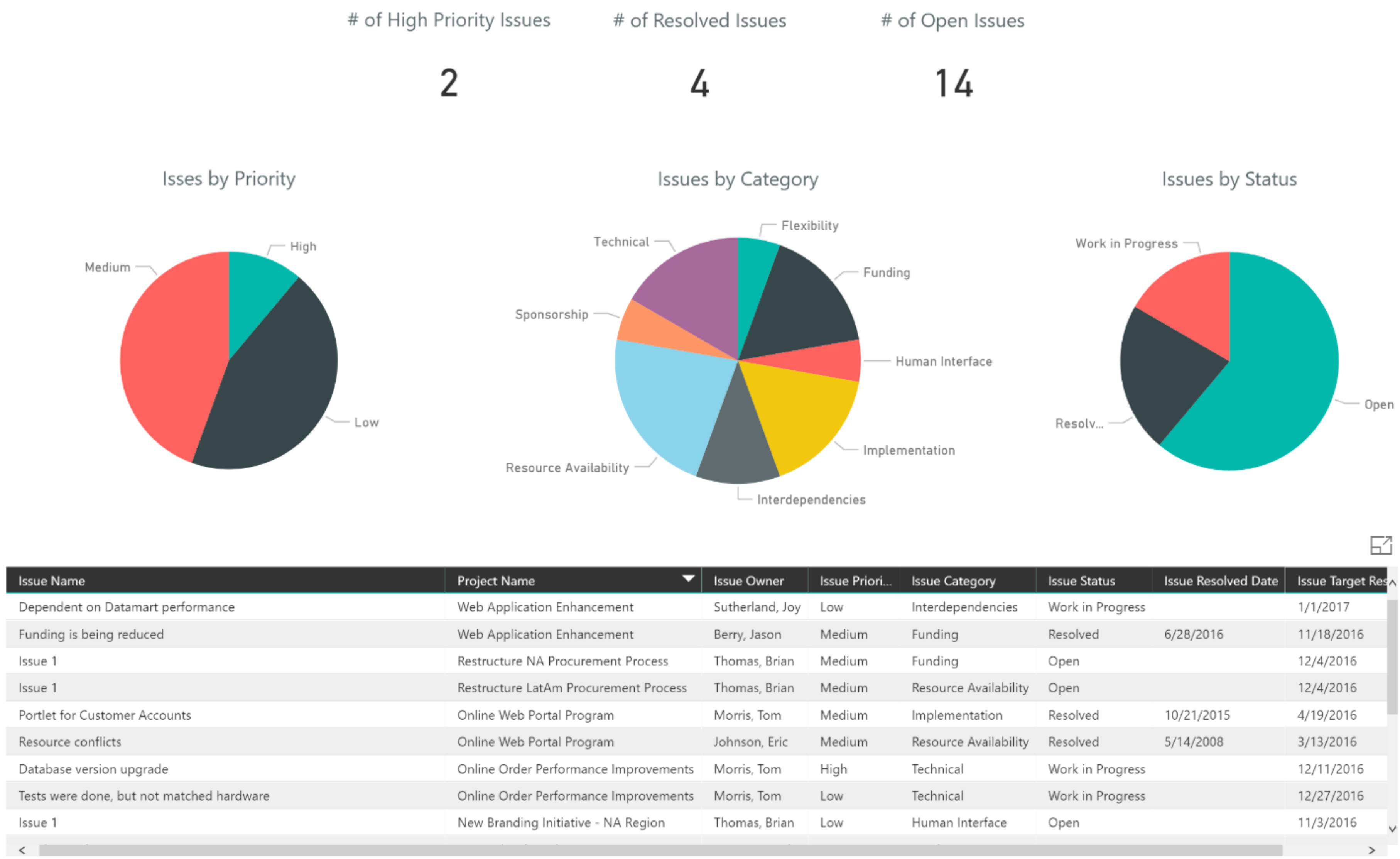
Change Requests by Status

Work in Progress
Closed
Open

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

PowerBI



# of High Priority Issues: 2

# of Resolved Issues: 4

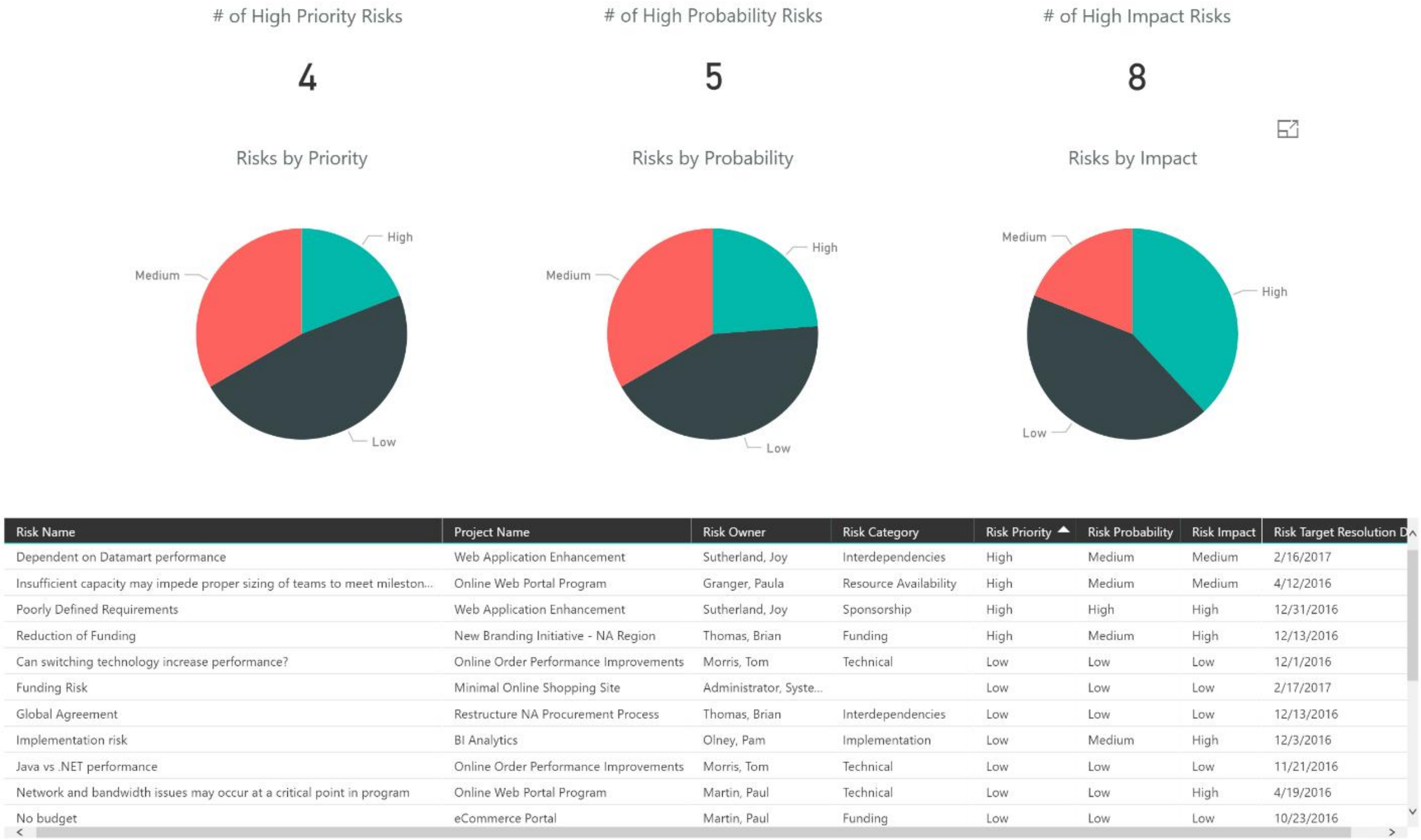
# of Open Issues: 14

Isses by Priority
High
Medium
Low
Issues by Category
Flexibility
Technical
Funding
Sponsorship
Human Interface
Implementation
Resource Availability
Interdependencies
Issues by Status
Work in Progress
Open
Resolv...

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

PowerBI



# of High Priority Risks

4

# of High Probability Risks

5

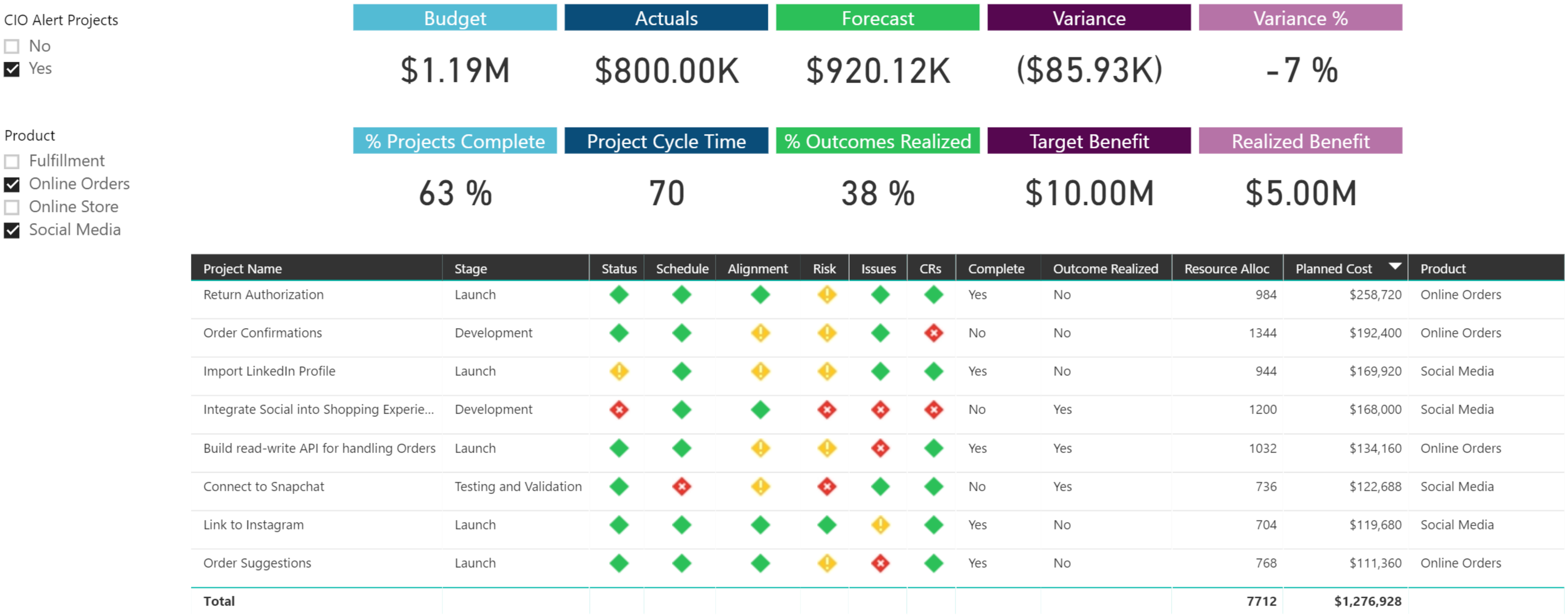
# of High Impact Risks

8

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

CA PowerBI – Project/Program – Health

PowerBI



CIO Alert Projects

☐ No
☑ Yes

Product

☐ Fulfillment
☑ Online Orders
☐ Online Store
☑ Social Media

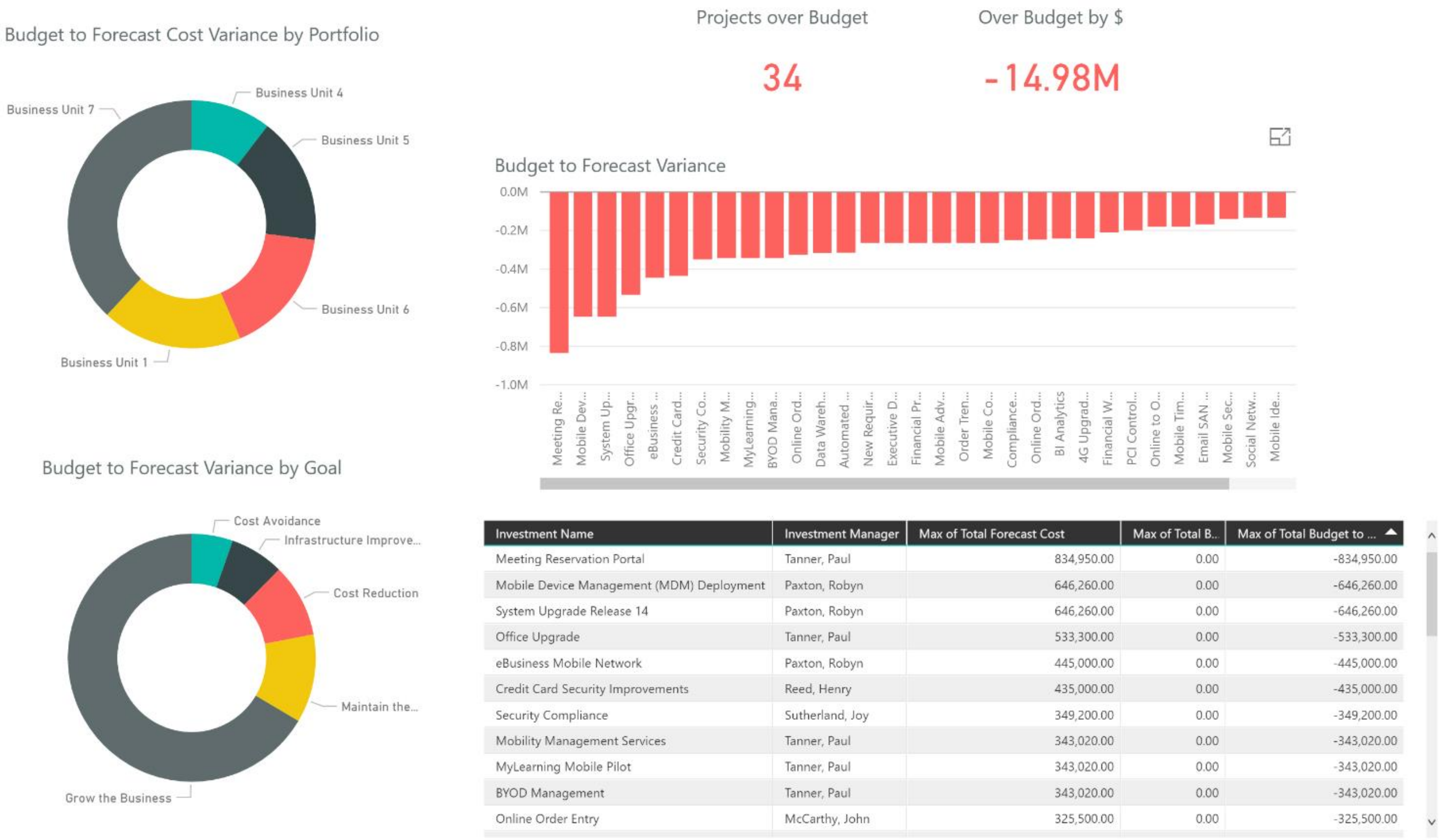
Budget	Actuals	Forecast	Variance	Variance %
$1.19M	$800.00K	$920.12K	($85.93K)	-7 %

% 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**	

CA PowerBI – Financial

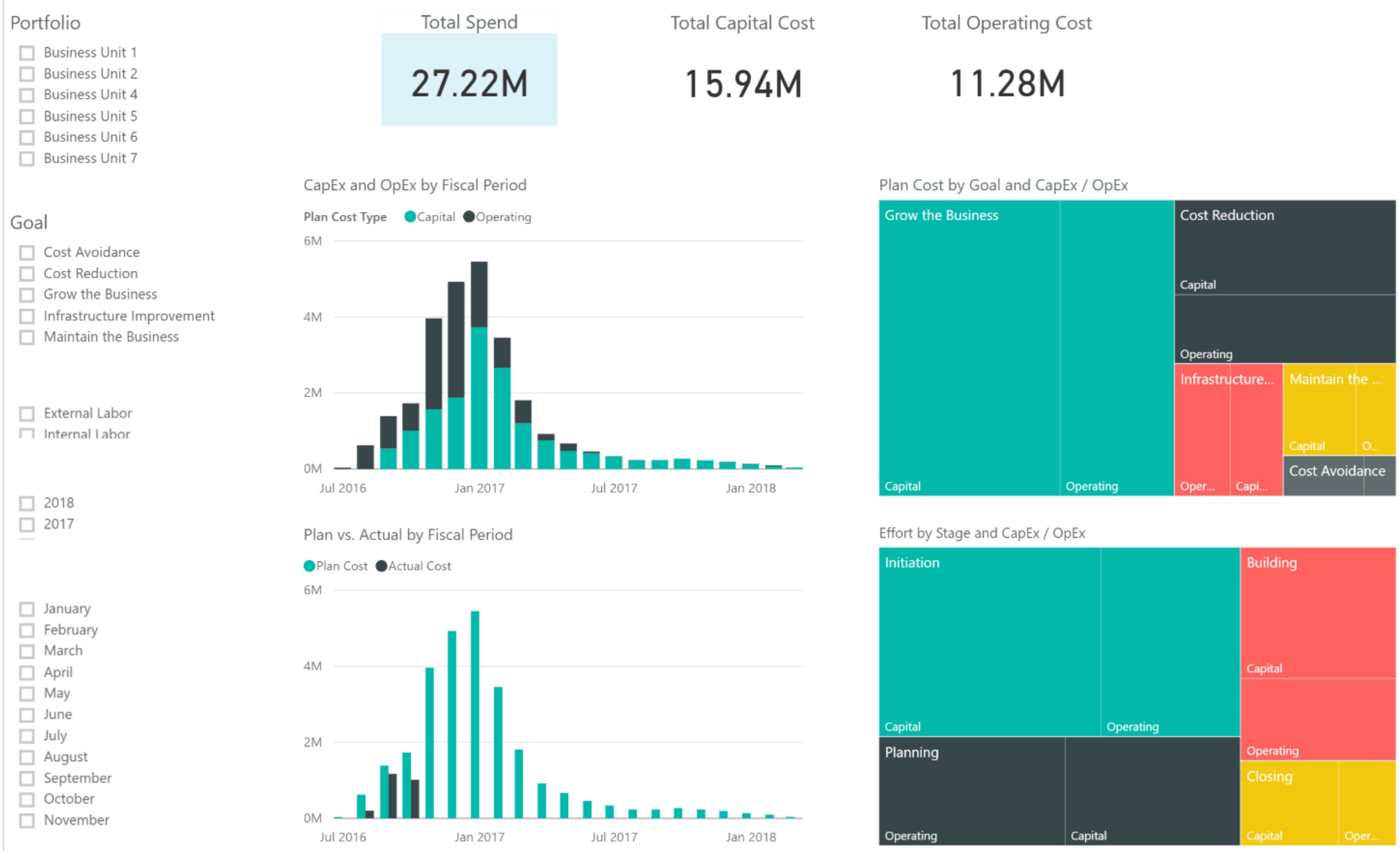
PowerBI


Budget to Forecast Cost Variance by Portfolio
Business Unit 7
Business Unit 4
Business Unit 5
Business Unit 6
Business Unit 1
Projects over Budget
34
Over Budget by $
-14.98M
Budget to Forecast Variance
0.0M
-0.2M
-0.4M
-0.6M
-0.8M
-1.0M
Meeting Re...
Mobile Dev...
System Up...
Office Upgr...
eBusiness ...
Credit Card...
Security Co...
Mobility M...
MyLearning...
BYOD Mana...
Online Ord...
Data Wareh...
Automated ...
New Requir...
Executive D...
Financial Pr...
Mobile Adv...
Order Tren...
Mobile Co...
Compliance...
Online Ord...
BI Analytics
4G Upgrad...
Financial W...
PCI Control...
Online to O...
Mobile Tim...
Email SAN ...
Mobile Sec...
Social Netw...
Mobile Ide...
Budget to Forecast Variance by Goal
Cost Avoidance
Infrastructure Improve...
Cost Reduction
Maintain the...
Grow the Business

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

CA PowerBI – Financial

PowerBI



Portfolio

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

Goal

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

☐ External Labor
☐ Internal Labor

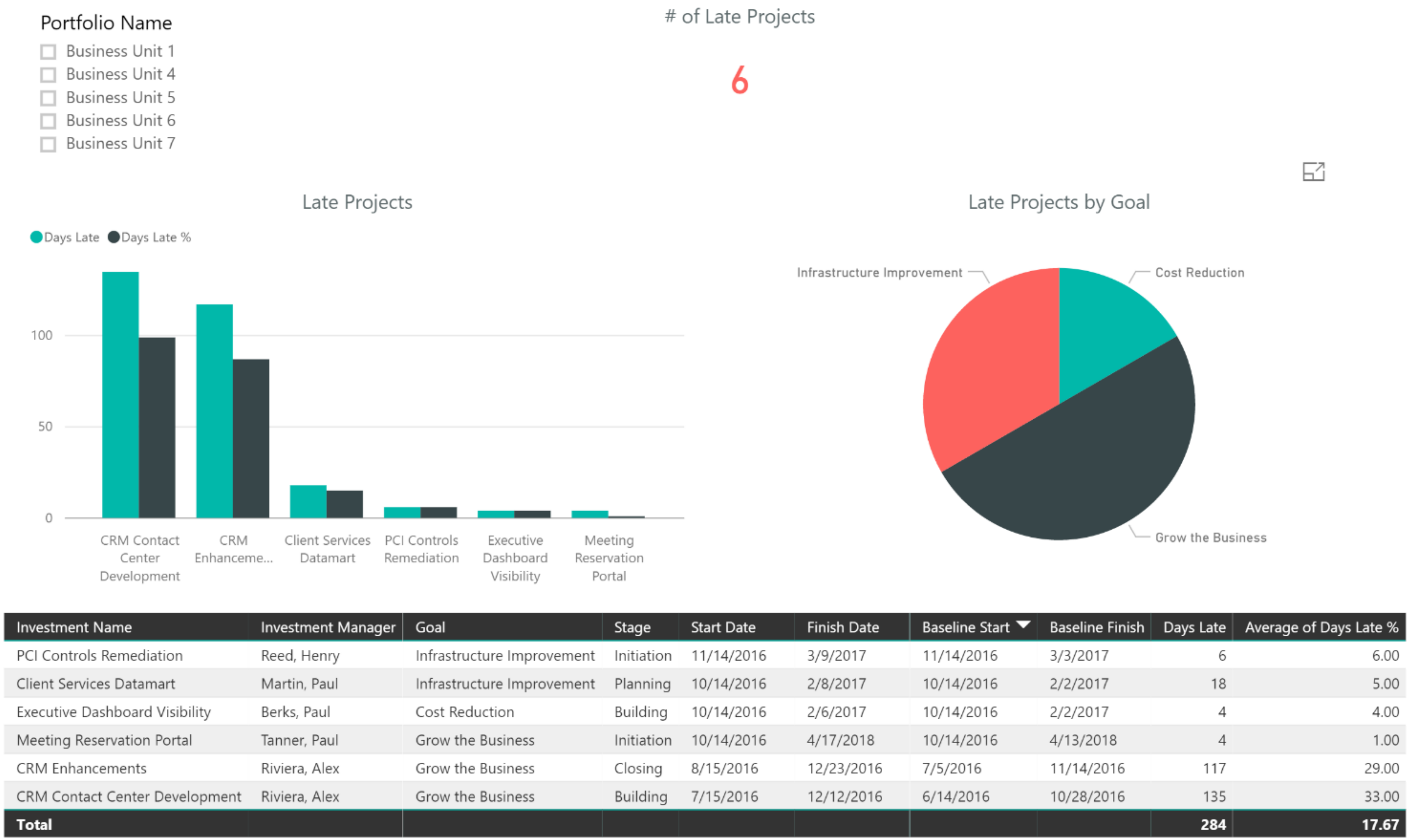
☐ 2018
☐ 2017

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

Total Spend	Total Capital Cost	Total Operating Cost
27.22M	15.94M	11.28M

CapEx and OpEx by Fiscal Period
Plan Cost Type ● Capital ● Operating
6M
4M
2M
0M
Jul 2016
Jan 2017
Jul 2017
Jan 2018
Plan vs. Actual by Fiscal Period
● Plan Cost ● Actual Cost
6M
4M
2M
0M
Jul 2016
Jan 2017
Jul 2017
Jan 2018
Plan Cost by Goal and CapEx / OpEx
Grow the Business
Capital
Operating
Cost Reduction
Capital
Operating
Infrastructure...
Oper...
Capi...
Maintain the ...
Capital
O...
Cost Avoidance
Effort by Stage and CapEx / OpEx
Initiation
Capital
Operating
Planning
Operating
Capital
Building
Capital
Operating
Closing
Capital
Oper...

CA PowerBI – Portfolio



Portfolio Name

☐ Business Unit 1
☐ Business Unit 4
☐ Business Unit 5
☐ Business Unit 6
☐ Business Unit 7

# of Late Projects

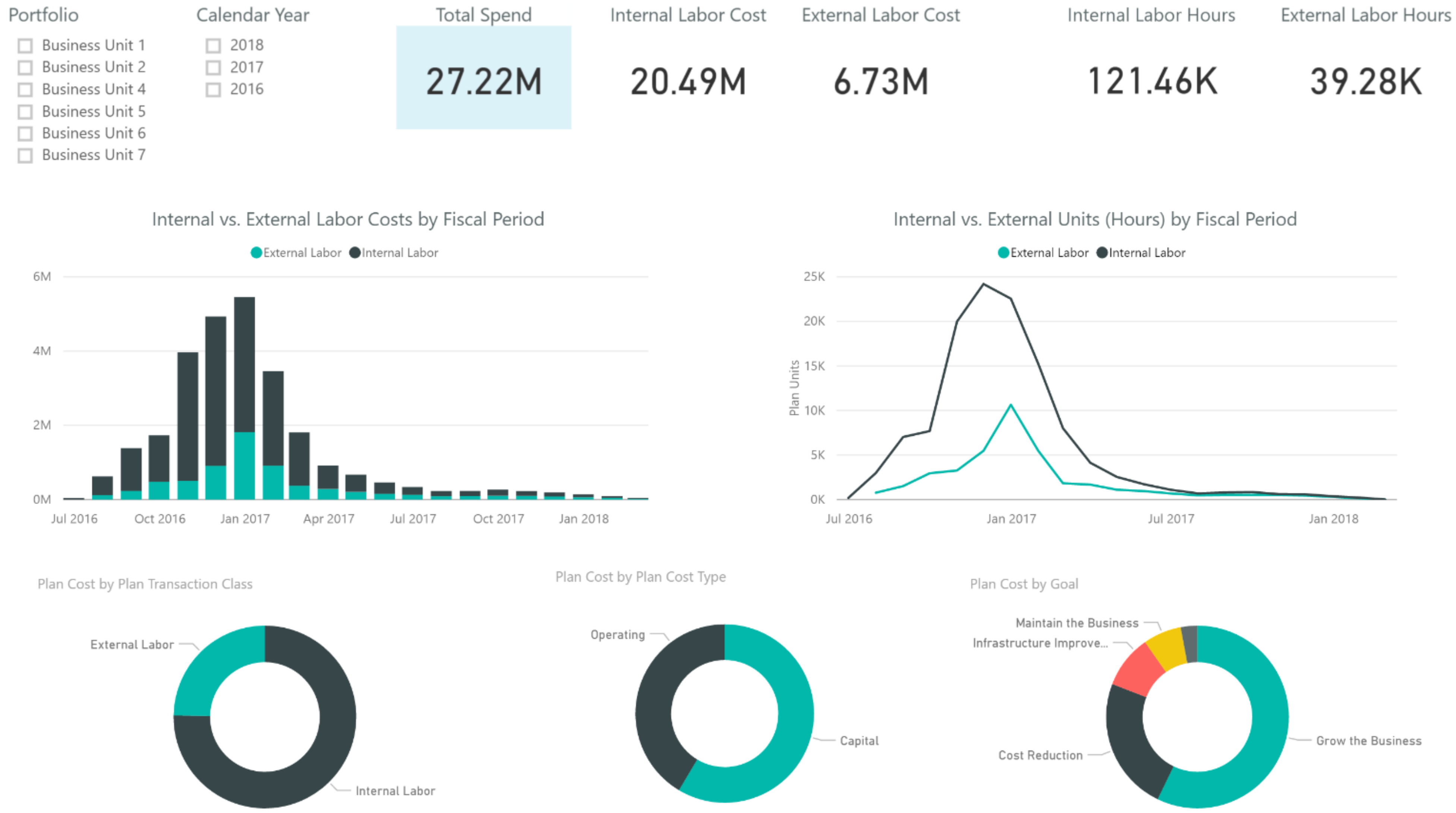
6

Late Projects
● Days Late ● Days Late %
100
50
0
CRM Contact Center Development
CRM Enhanceme...
Client Services Datamart
PCI Controls Remediation
Executive Dashboard Visibility
Meeting Reservation Portal
Late Projects by Goal
Infrastructure Improvement
Cost Reduction
Grow the Business

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**

CA PowerBI – Portfolio

PowerBI



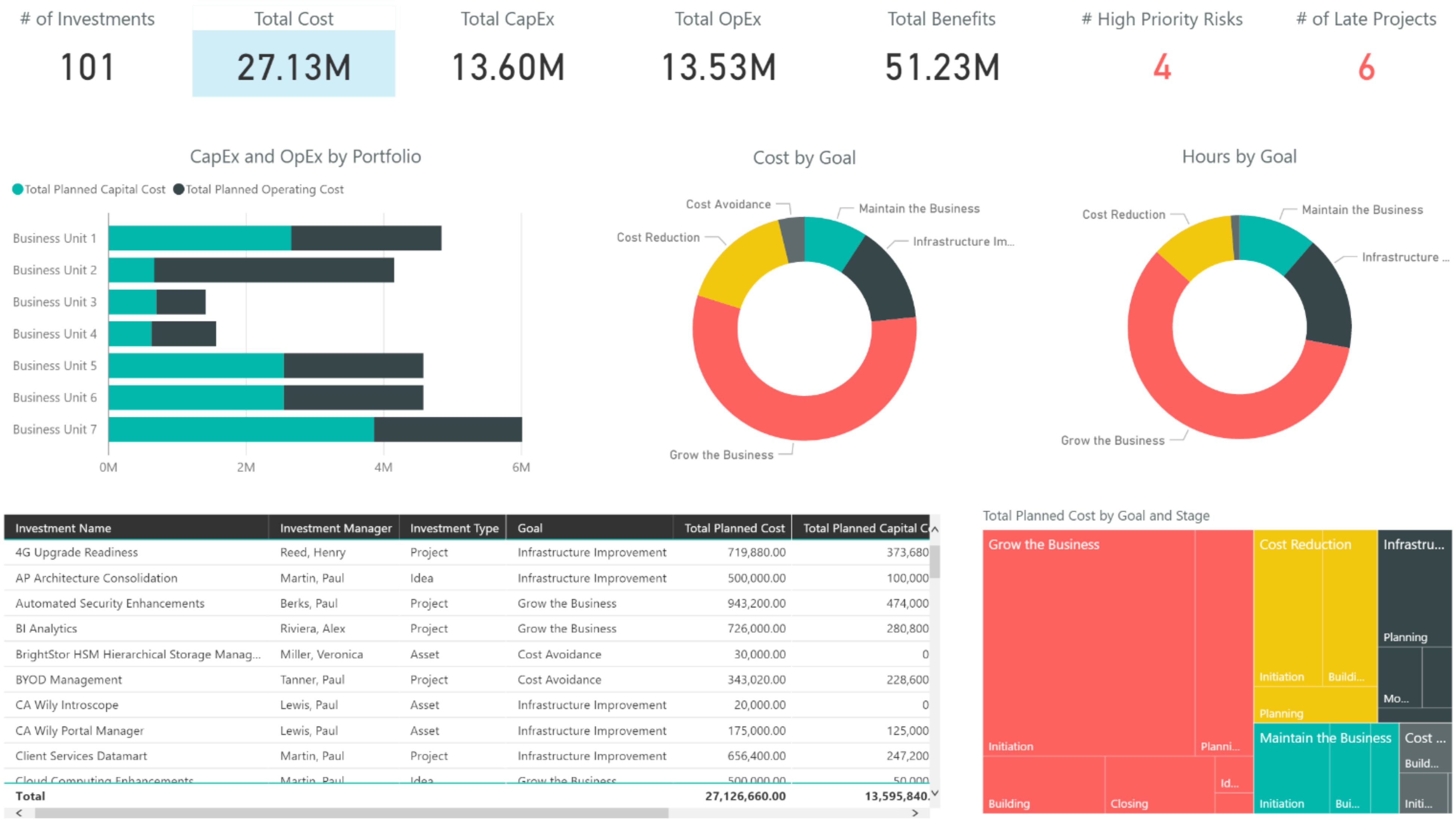
Portfolio
☐ Business Unit 1
☐ Business Unit 2
☐ Business Unit 4
☐ Business Unit 5
☐ Business Unit 6
☐ Business Unit 7

Calendar Year
☐ 2018
☐ 2017
☐ 2016

Total Spend	Internal Labor Cost	External Labor Cost	Internal Labor Hours	External Labor Hours
27.22M	20.49M	6.73M	121.46K	39.28K

Internal vs. External Labor Costs by Fiscal Period
● External Labor ● Internal Labor
6M
4M
2M
0M
Jul 2016
Oct 2016
Jan 2017
Apr 2017
Jul 2017
Oct 2017
Jan 2018
Internal vs. External Units (Hours) by Fiscal Period
● External Labor ● Internal Labor
25K
20K
15K
10K
5K
0K
Plan Units
Jul 2016
Jan 2017
Jul 2017
Jan 2018
Plan Cost by Plan Transaction Class
External Labor
Internal Labor
Plan Cost by Plan Cost Type
Operating
Capital
Plan Cost by Goal
Maintain the Business
Infrastructure Improve...
Cost Reduction
Grow the Business

CA PowerBI – Portfolio



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

CapEx and OpEx by Portfolio
● Total Planned Capital Cost ● Total Planned Operating Cost
Business Unit 1
Business Unit 2
Business Unit 3
Business Unit 4
Business Unit 5
Business Unit 6
Business Unit 7
0M
2M
4M
6M
Cost by Goal
Cost Avoidance
Maintain the Business
Cost Reduction
Infrastructure Im...
Grow the Business
Hours by Goal
Cost Reduction
Maintain the Business
Infrastructure ...
Grow the Business
Total Planned Cost by Goal and Stage
Grow the Business
Initiation
Planni...
Building
Closing
Id...
Cost Reduction
Initiation
Buildi...
Planning
Infrastru...
Planning
Mo...
Maintain the Business
Initiation
Bui...
Cost ...
Build...
Initi...

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.**

Questions?

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- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
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APPENDIX: OOTB Metric Dashboards

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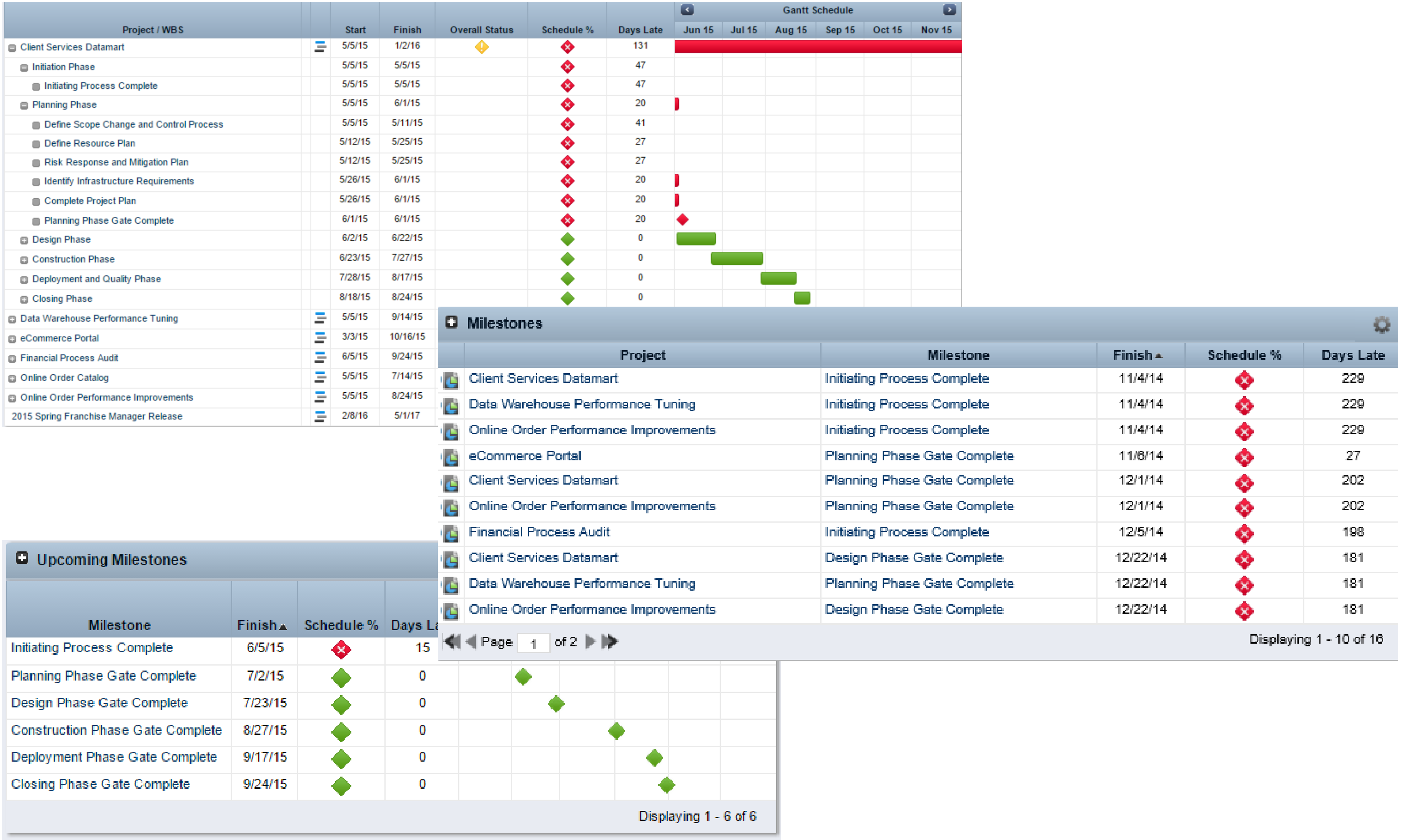
OOTB Metrics – Tasks

Portlet



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

Milestones

Project	Milestone	Finish ▲	Schedule %	Days Late
Client Services Datamart	Initiating Process Complete	11/4/14	✖	229
Data Warehouse Performance Tuning	Initiating Process Complete	11/4/14	✖	229
Online Order Performance Improvements	Initiating Process Complete	11/4/14	✖	229
eCommerce Portal	Planning Phase Gate Complete	11/6/14	✖	27
Client Services Datamart	Planning Phase Gate Complete	12/1/14	✖	202
Online Order Performance Improvements	Planning Phase Gate Complete	12/1/14	✖	202
Financial Process Audit	Initiating Process Complete	12/5/14	✖	198
Client Services Datamart	Design Phase Gate Complete	12/22/14	✖	181
Data Warehouse Performance Tuning	Planning Phase Gate Complete	12/22/14	✖	181
Online Order Performance Improvements	Design Phase Gate Complete	12/22/14	✖	181

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Upcoming Milestones

Milestone	Finish ▲	Schedule %	Days La
Initiating Process Complete	6/5/15	✖	15
Planning Phase Gate Complete	7/2/15	◆	0
Design Phase Gate Complete	7/23/15	◆	0
Construction Phase Gate Complete	8/27/15	◆	0
Deployment Phase Gate Complete	9/17/15	◆	0
Closing Phase Gate Complete	9/24/15	◆	0

Displaying 1 - 6 of 6

OOTB Metrics – Tasks

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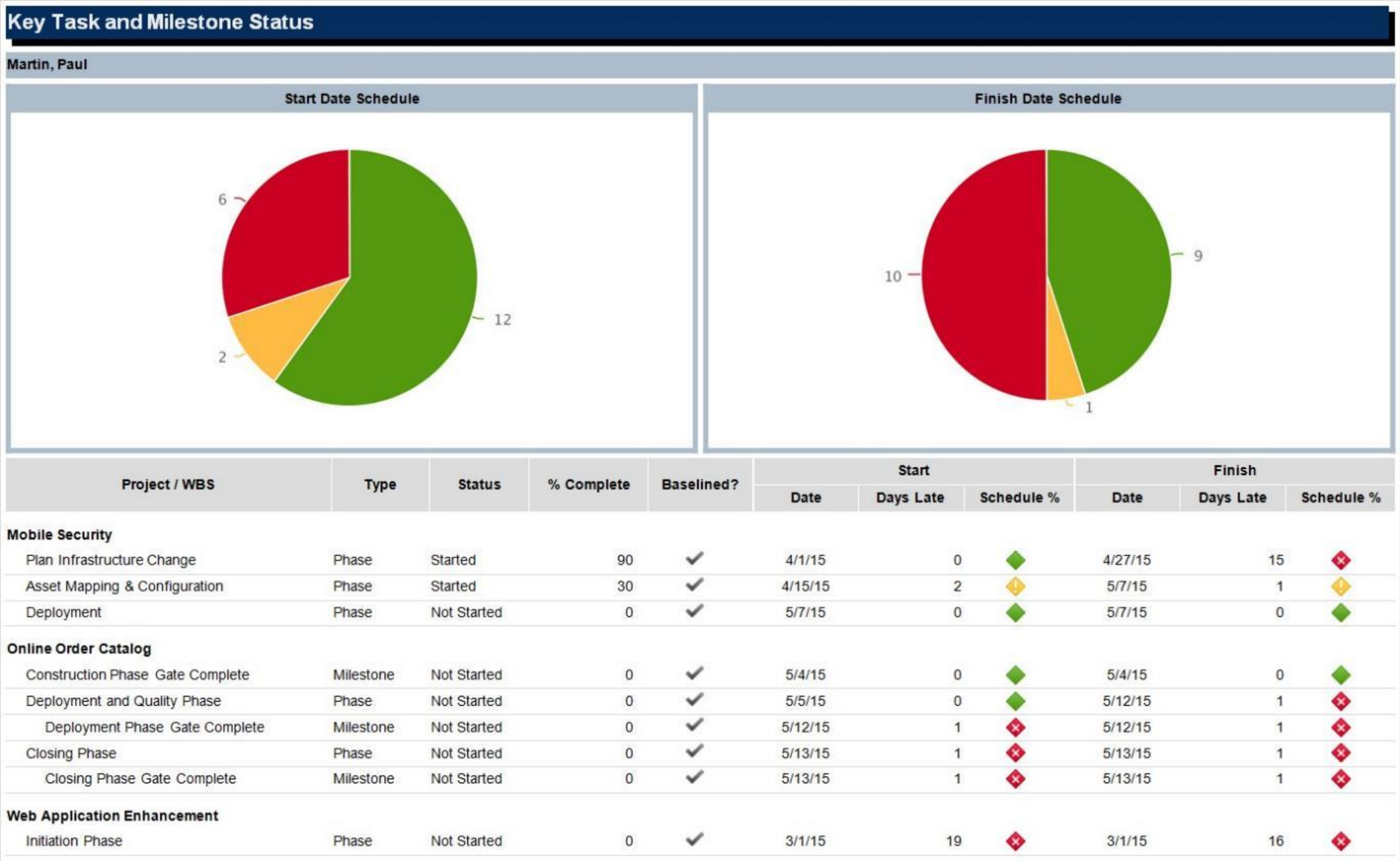


Key Task and Milestone Status

Martin, Paul

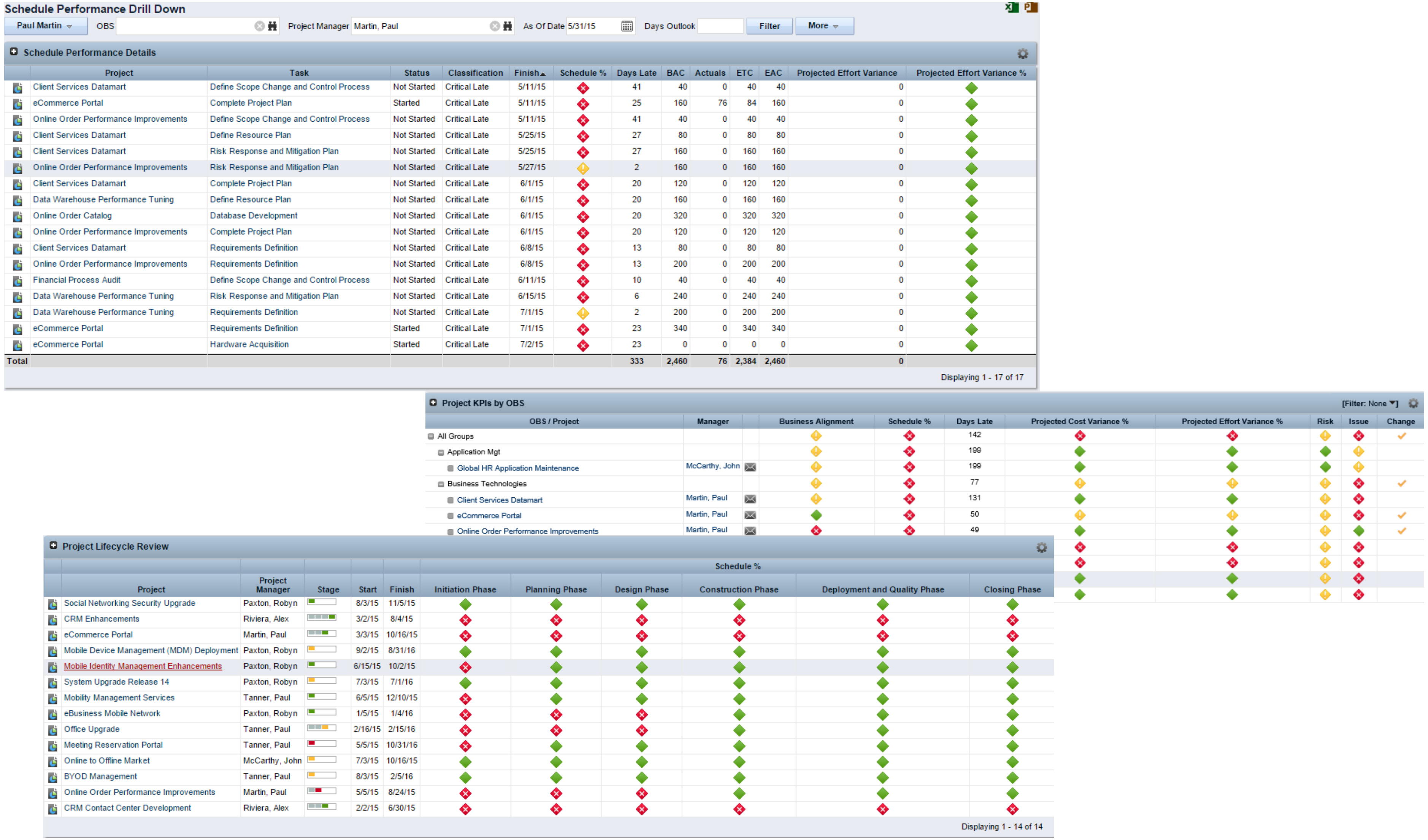
Start Date Schedule

Finish Date Schedule

Project / WBS	Type	Status	% Complete	Baselined?	Start			Finish		
					Date	Days Late	Schedule %	Date	Days Late	Schedule %
Mobile Security										
Plan Infrastructure Change	Phase	Started	90	✓	4/1/15	0	◆	4/27/15	15	✖
Asset Mapping & Configuration	Phase	Started	30	✓	4/15/15	2	⚠	5/7/15	1	⚠
Deployment	Phase	Not Started	0	✓	5/7/15	0	◆	5/7/15	0	◆
Online Order Catalog										
Construction Phase Gate Complete	Milestone	Not Started	0	✓	5/4/15	0	◆	5/4/15	0	◆
Deployment and Quality Phase	Phase	Not Started	0	✓	5/5/15	0	◆	5/12/15	1	✖
Deployment Phase Gate Complete	Milestone	Not Started	0	✓	5/12/15	1	✖	5/12/15	1	✖
Closing Phase	Phase	Not Started	0	✓	5/13/15	1	✖	5/13/15	1	✖
Closing Phase Gate Complete	Milestone	Not Started	0	✓	5/13/15	1	✖	5/13/15	1	✖
Web Application Enhancement										
Initiation Phase	Phase	Not Started	0	✓	3/1/15	19	✖	3/1/15	16	✖

OOTB Metrics – Project/Program - Variances

Portlet



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]

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

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

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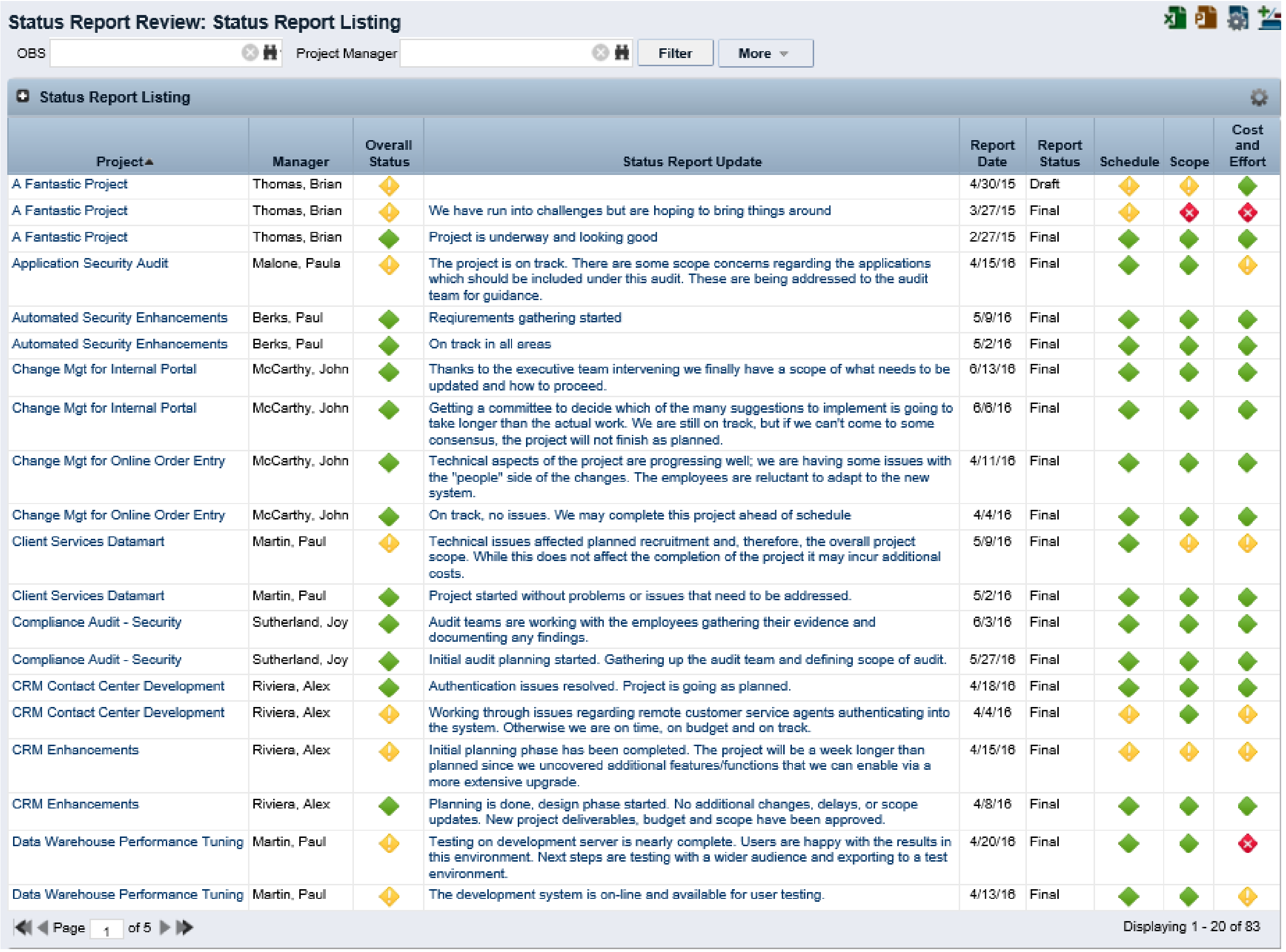
OOTB Metrics – Project/Program - Status

Portlet



Status Report Review: Status Report Listing

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	◆	Reqiurements 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.	6/6/16	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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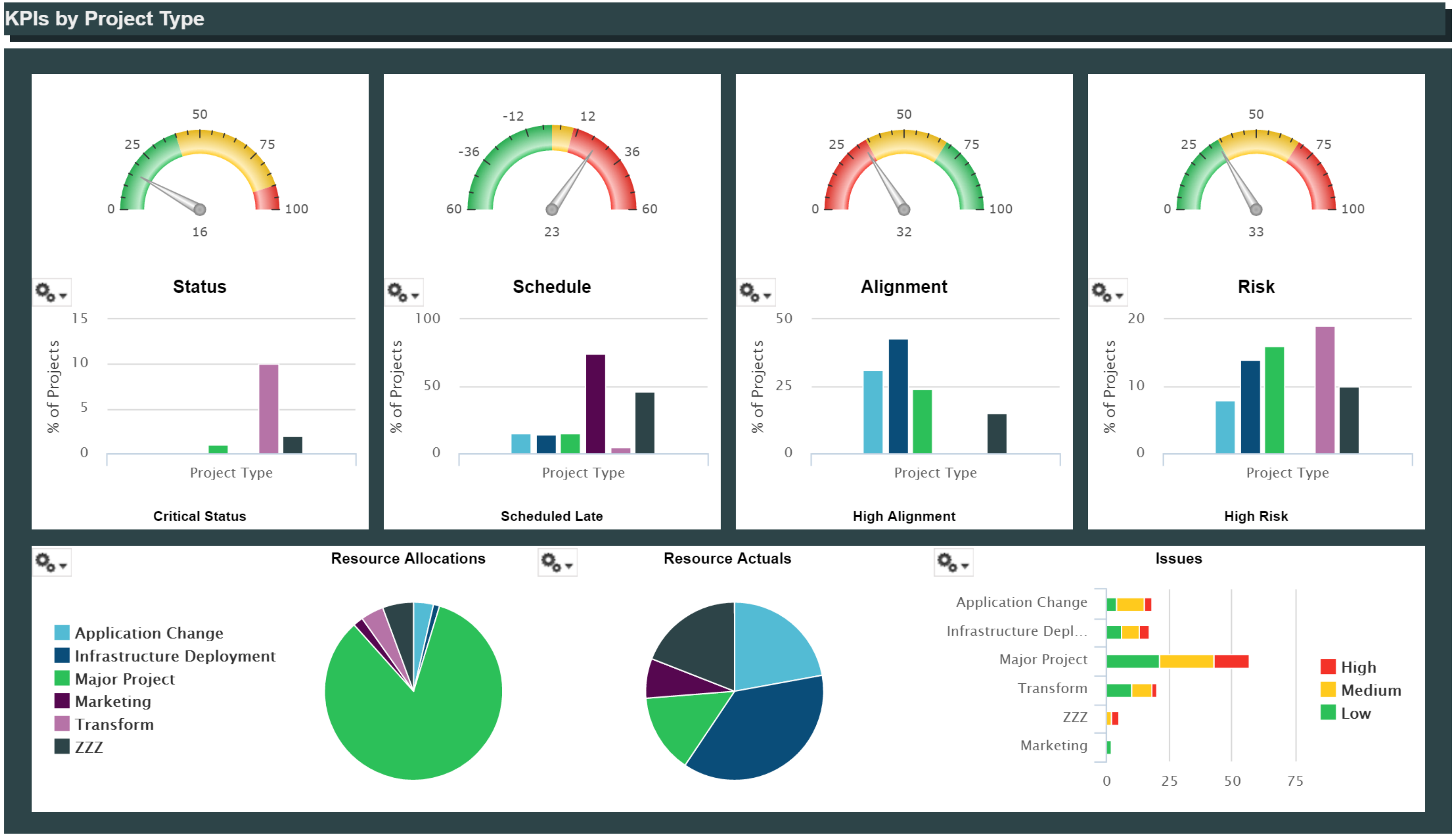
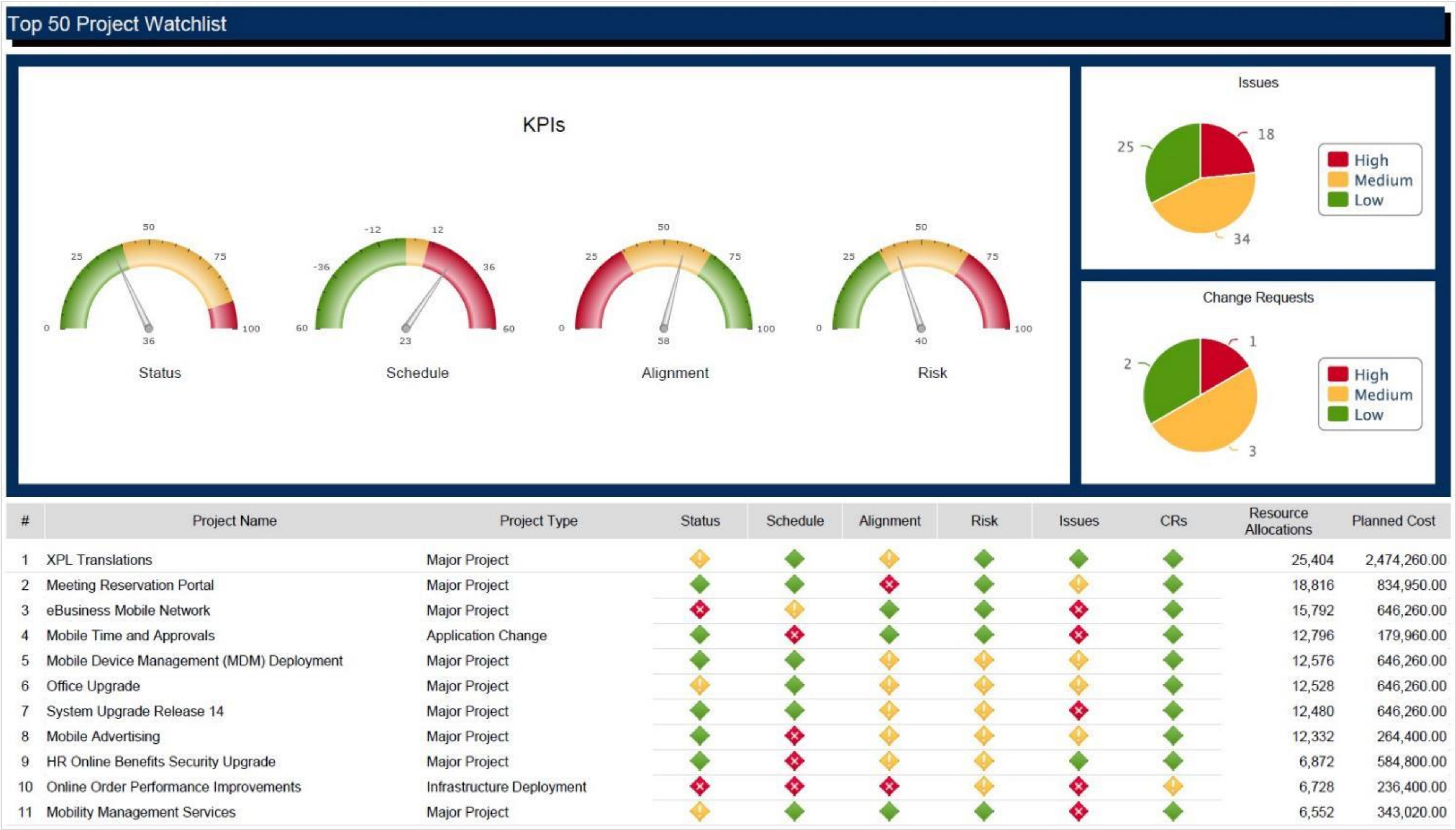
OOTB Metrics – Project/Program Health

Jaspersoft Dashboard


KPIs by Project Type
50
25
75
0
100
16
Status
15
10
5
0
% of Projects
Project Type
Critical Status
-12
12
-36
36
60
60
23
Schedule
100
50
0
% of Projects
Project Type
Scheduled Late
50
25
75
0
100
32
Alignment
50
25
0
% of Projects
Project Type
High Alignment
50
25
75
0
100
33
Risk
20
10
0
% of Projects
Project Type
High Risk
Resource Allocations
Application Change
Infrastructure Deployment
Major Project
Marketing
Transform
ZZZ
Resource Actuals
Issues
Application Change
Infrastructure Depl...
Major Project
Transform
ZZZ
Marketing
0
25
50
75
High
Medium
Low

OOTB Metrics – Project/Program – Health

Jaspersoft Studio



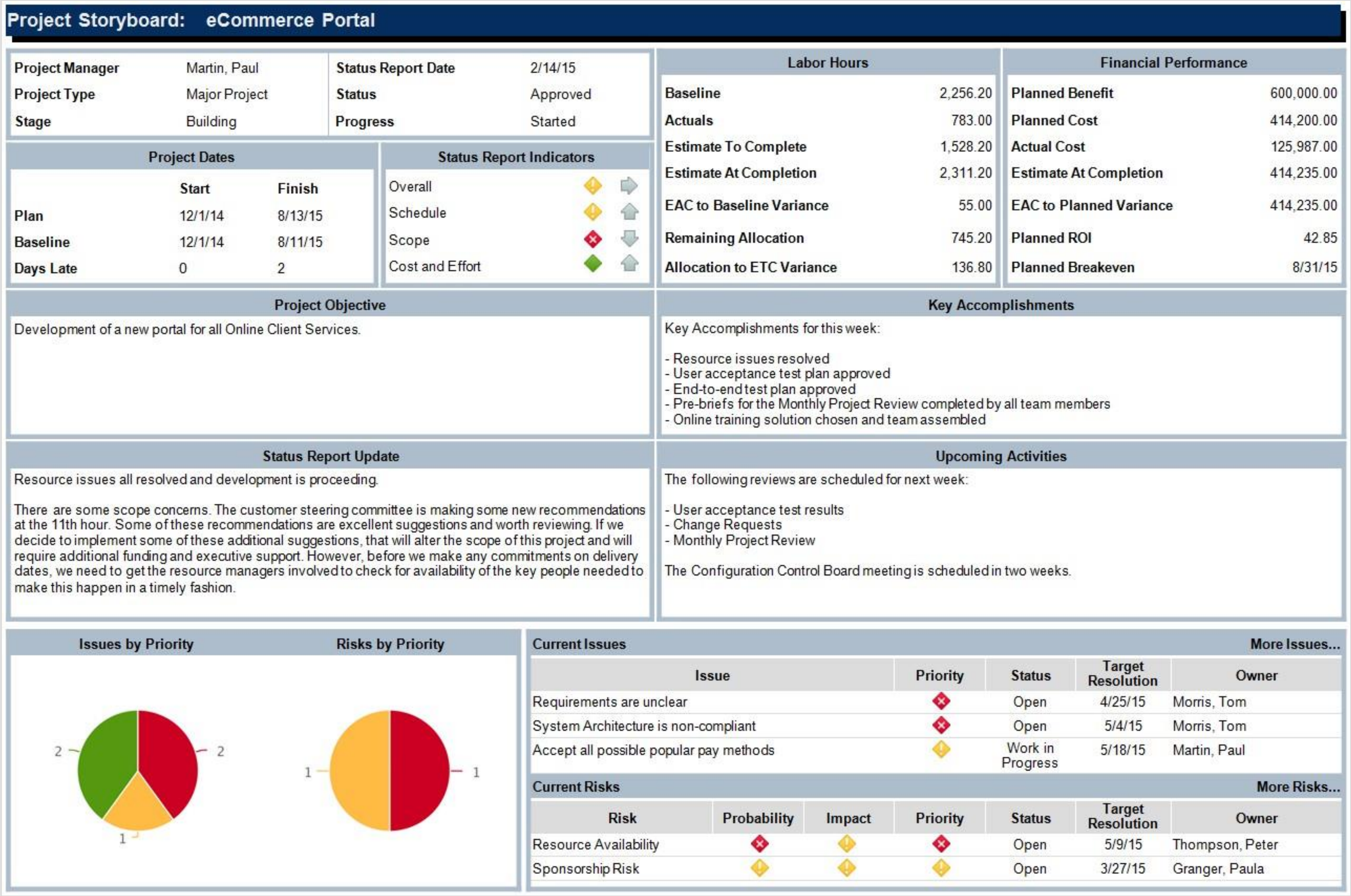
Top 50 Project Watchlist

KPIs
0
25
50
75
100
36
Status
60
-36
-12
12
36
60
23
Schedule
0
25
50
75
100
58
Alignment
0
25
50
75
100
40
Risk
Issues
25
18
34
High
Medium
Low
Change Requests
2
1
3
High
Medium
Low

#	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

Jaspersoft Studio



Project Storyboard: eCommerce Portal

Project Manager	Martin, Paul	**Status Report Date**	2/14/15
Project Type	Major Project	**Status**	Approved
Stage	Building	**Progress**	Started

Labor Hours

Baseline	2,256.20
Actuals	783.00
Estimate To Complete	1,528.20
Estimate At Completion	2,311.20
EAC to Baseline Variance	55.00
Remaining Allocation	745.20
Allocation to ETC Variance	136.80

Financial Performance

Planned Benefit	600,000.00
Planned Cost	414,200.00
Actual Cost	125,987.00
Estimate At Completion	414,235.00
EAC to Planned Variance	414,235.00
Planned ROI	42.85
Planned Breakeven	8/31/15

Project Dates

	Start	**Finish**
Plan	12/1/14	8/13/15
Baseline	12/1/14	8/11/15
Days Late	0	2

Status Report Indicators

Overall	◆	➡
Schedule	◆	⬆
Scope	✖	⬇
Cost and Effort	◆	⬆

Project Objective

Development of a new portal for all Online Client Services.

Key Accomplishments

Key Accomplishments for this week:

- Resource issues resolved
- User acceptance test plan approved
- End-to-end test plan approved
- Pre-briefs for the Monthly Project Review completed by all team members
- Online training solution chosen and team assembled

Status Report Update

Resource issues all resolved and development is proceeding.

There are some scope concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. However, before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.

Upcoming Activities

The following reviews are scheduled for next week:

- User acceptance test results
- Change Requests
- Monthly Project Review

The Configuration Control Board meeting is scheduled in two weeks.

Issues by Priority **Risks by Priority**

Current Issues More Issues...

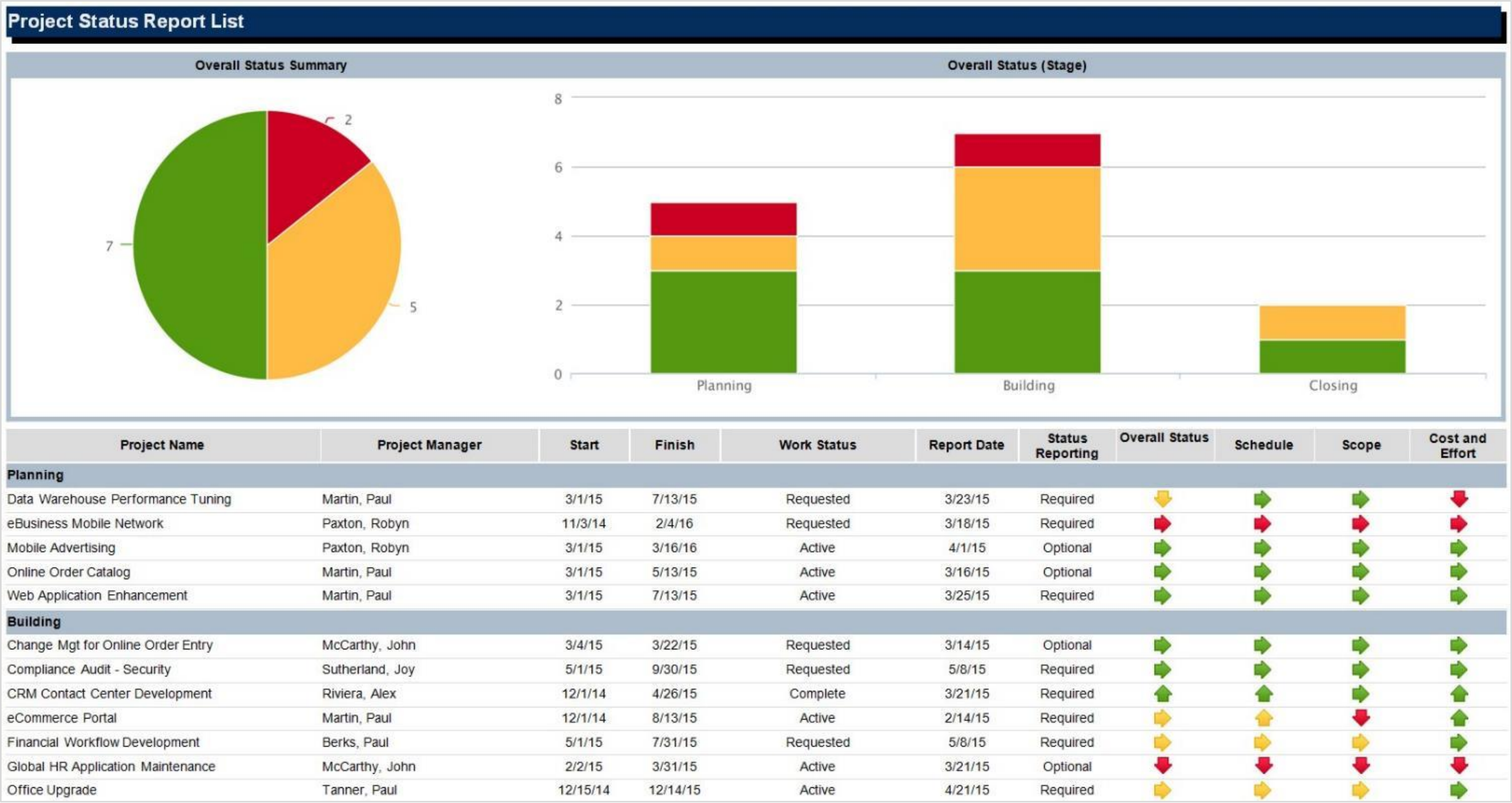
Issue	Priority	Status	Target Resolution	Owner
Requirements are unclear	✖	Open	4/25/15	Morris, Tom
System Architecture is non-compliant	✖	Open	5/4/15	Morris, Tom
Accept all possible popular pay methods	◆	Work in Progress	5/18/15	Martin, Paul

Current Risks More Risks...

Risk	Probability	Impact	Priority	Status	Target Resolution	Owner
Resource Availability	✖	◆	✖	Open	5/9/15	Thompson, Peter
Sponsorship Risk	◆	◆	◆	Open	3/27/15	Granger, Paula

OOTB Metrics – Project/Program – Health

Jaspersoft Studio



Project Status Report List

Project Name	Project Manager	Start	Finish	Work Status	Report Date	Status Reporting	Overall Status	Schedule	Scope	Cost and Effort
Planning										
Data Warehouse Performance Tuning	Martin, Paul	3/1/15	7/13/15	Requested	3/23/15	Required	🟨⬇	🟩➡	🟩➡	🟥⬇
eBusiness Mobile Network	Paxton, Robyn	11/3/14	2/4/16	Requested	3/18/15	Required	🟥➡	🟥➡	🟥➡	🟥➡
Mobile Advertising	Paxton, Robyn	3/1/15	3/16/16	Active	4/1/15	Optional	🟩➡	🟩➡	🟩➡	🟩➡
Online Order Catalog	Martin, Paul	3/1/15	5/13/15	Active	3/16/15	Optional	🟩➡	🟩➡	🟩➡	🟩➡
Web Application Enhancement	Martin, Paul	3/1/15	7/13/15	Active	3/25/15	Required	🟩➡	🟩➡	🟩➡	🟩➡
Building										
Change Mgt for Online Order Entry	McCarthy, John	3/4/15	3/22/15	Requested	3/14/15	Optional	🟩➡	🟩➡	🟩➡	🟩➡
Compliance Audit - Security	Sutherland, Joy	5/1/15	9/30/15	Requested	5/8/15	Required	🟩➡	🟩➡	🟩➡	🟩➡
CRM Contact Center Development	Riviera, Alex	12/1/14	4/26/15	Complete	3/21/15	Required	🟩⬆	🟩⬆	🟩➡	🟩⬆
eCommerce Portal	Martin, Paul	12/1/14	8/13/15	Active	2/14/15	Required	🟨➡	🟨⬆	🟥⬇	🟩⬆
Financial Workflow Development	Berks, Paul	5/1/15	7/31/15	Requested	5/8/15	Required	🟨➡	🟨➡	🟨➡	🟩➡
Global HR Application Maintenance	McCarthy, John	2/2/15	3/31/15	Active	3/21/15	Optional	🟥⬇	🟥⬇	🟥⬇	🟥⬇
Office Upgrade	Tanner, Paul	12/15/14	12/14/15	Active	4/21/15	Required	🟨➡	🟨➡	🟨➡	🟩➡

OOTB Metrics – Project/Program – Health

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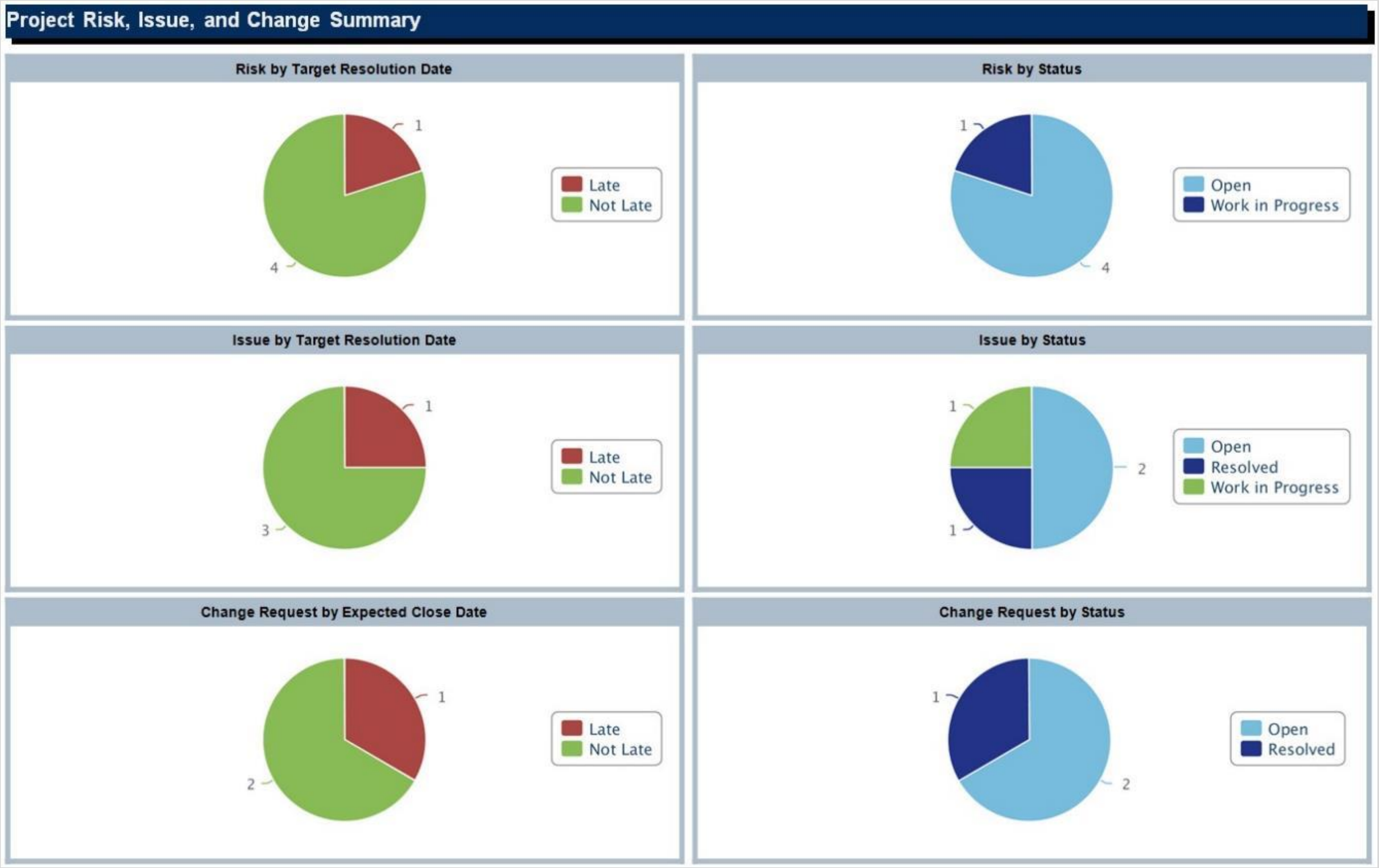
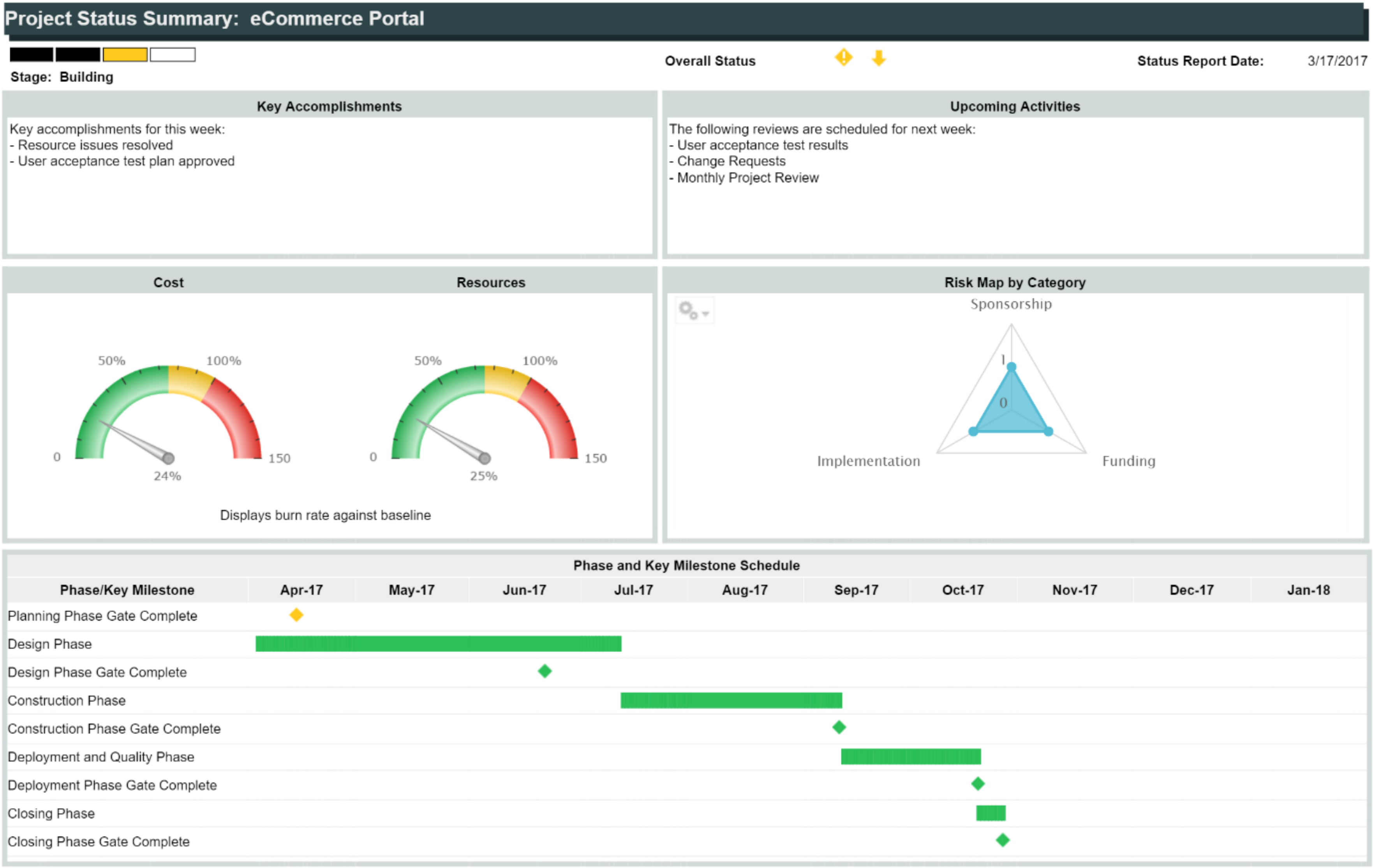


OOTB Metrics – Project/Program – Health

Jaspersoft Dashboard



Project Status Summary: eCommerce Portal

Stage: Building

Overall Status

Status Report Date: 3/17/2017

Key Accomplishments

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

Upcoming Activities

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

Cost
50%
100%
0
150
24%
Resources
50%
100%
0
150
25%

Displays burn rate against baseline

Risk Map by Category
Sponsorship
1
0
Implementation
Funding

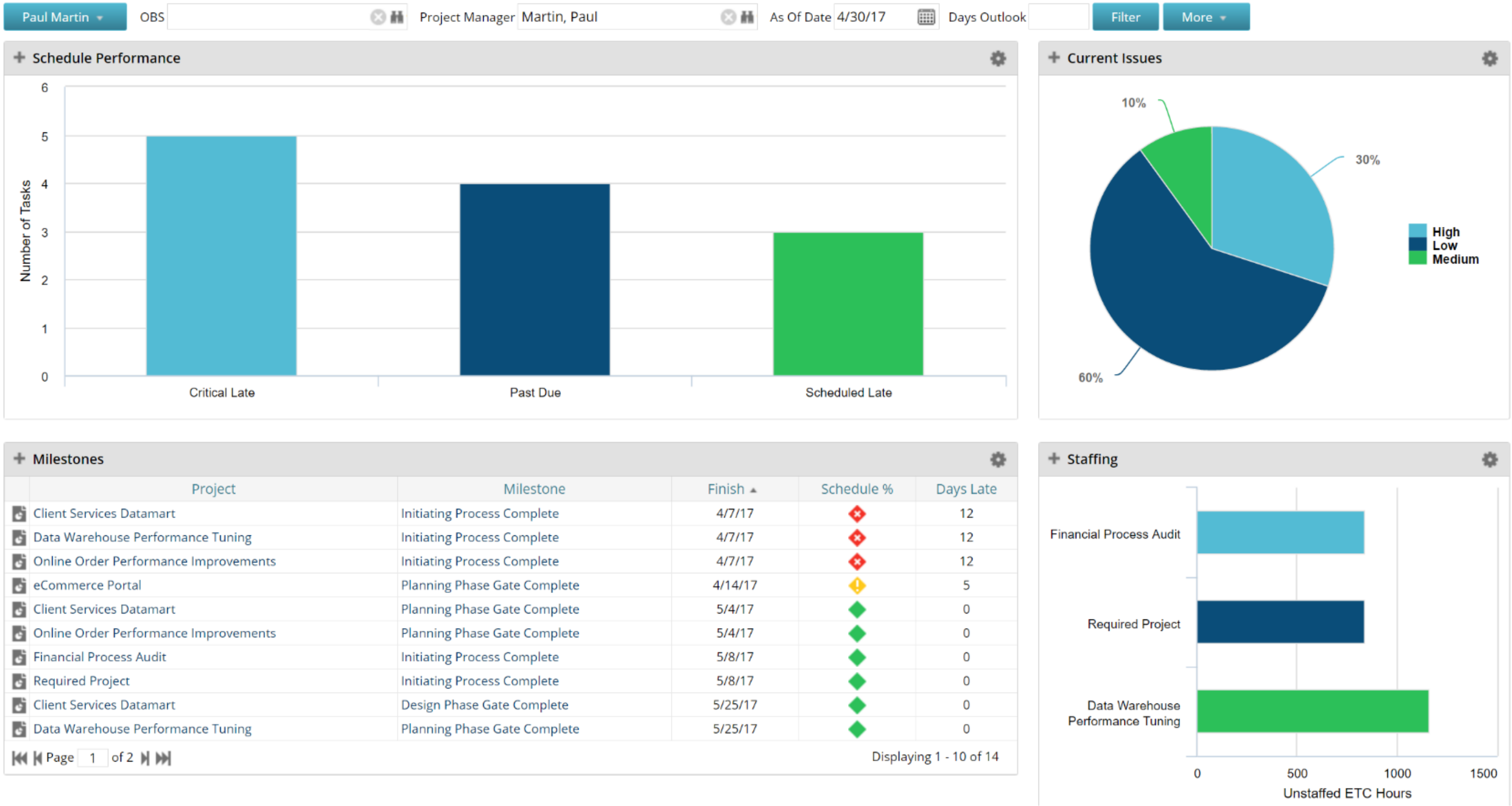
Phase and Key Milestone Schedule

Phase/Key Milestone
Apr-17
May-17
Jun-17
Jul-17
Aug-17
Sep-17
Oct-17
Nov-17
Dec-17
Jan-18

Planning Phase Gate Complete
Design Phase
Design Phase Gate Complete
Construction Phase
Construction Phase Gate Complete
Deployment and Quality Phase
Deployment Phase Gate Complete
Closing Phase
Closing Phase Gate Complete

OOTB Metrics – Project/Program – Health

Portlet


Paul Martin ▾
Filter
More ▾
Schedule Performance
Number of Tasks
0
1
2
3
4
5
6
Critical Late
Past Due
Scheduled Late
Current Issues
10%
30%
60%
High
Low
Medium
Staffing
Financial Process Audit
Required Project
Data Warehouse Performance Tuning
0
500
1000
1500
Unstaffed ETC Hours

OBS

Project Manager Martin, Paul

As Of Date 4/30/17

Days Outlook

Milestones

Project	Milestone	Finish ▲	Schedule %	Days Late
Client Services Datamart	Initiating Process Complete	4/7/17	✖	12
Data Warehouse Performance Tuning	Initiating Process Complete	4/7/17	✖	12
Online Order Performance Improvements	Initiating Process Complete	4/7/17	✖	12
eCommerce Portal	Planning Phase Gate Complete	4/14/17	⚠	5
Client Services Datamart	Planning Phase Gate Complete	5/4/17	◆	0
Online Order Performance Improvements	Planning Phase Gate Complete	5/4/17	◆	0
Financial Process Audit	Initiating Process Complete	5/8/17	◆	0
Required Project	Initiating Process Complete	5/8/17	◆	0
Client Services Datamart	Design Phase Gate Complete	5/25/17	◆	0
Data Warehouse Performance Tuning	Planning Phase Gate Complete	5/25/17	◆	0

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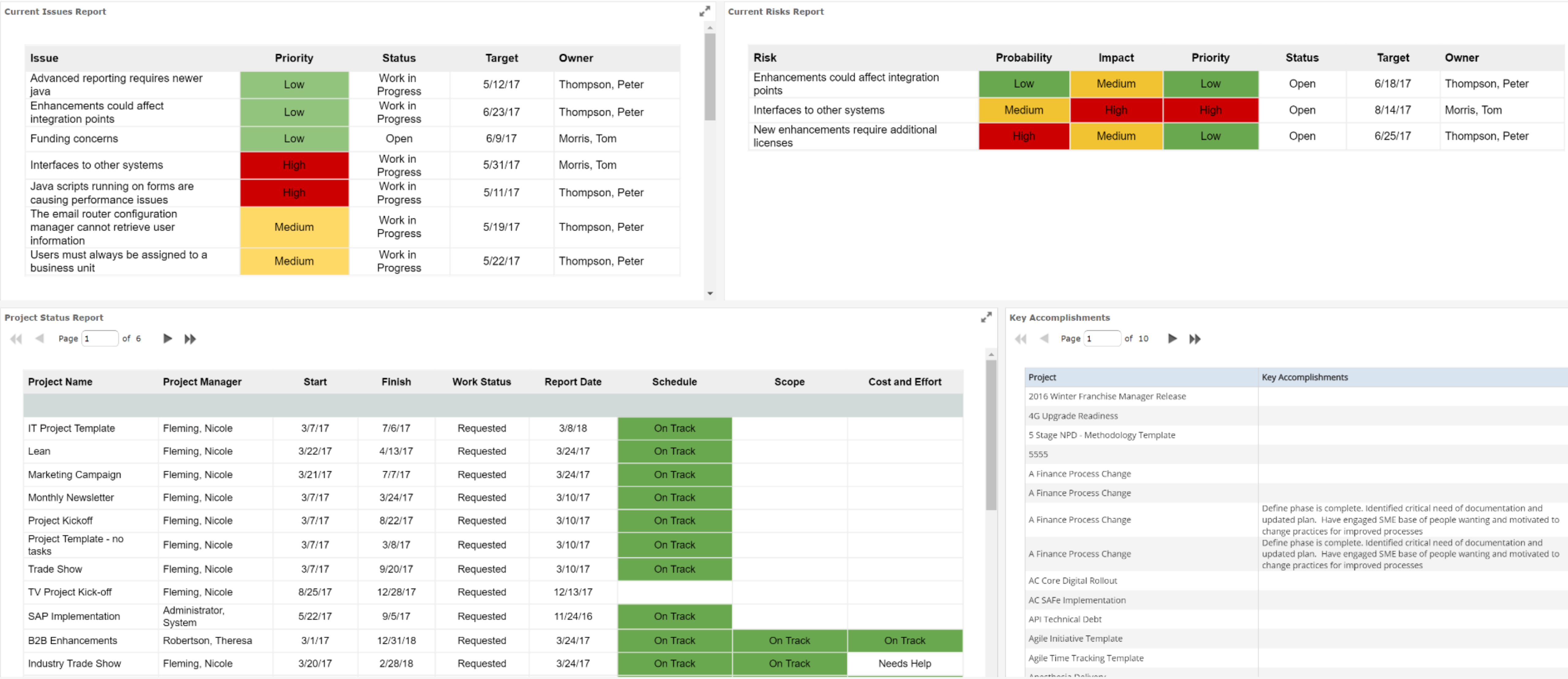
Displaying 1 - 10 of 14

OOTB Metrics – Project/Program – Health

Jaspersoft Dashboard



Current Issues Report

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

Current Risks Report

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

Project Status Report

Page 1 of 6

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

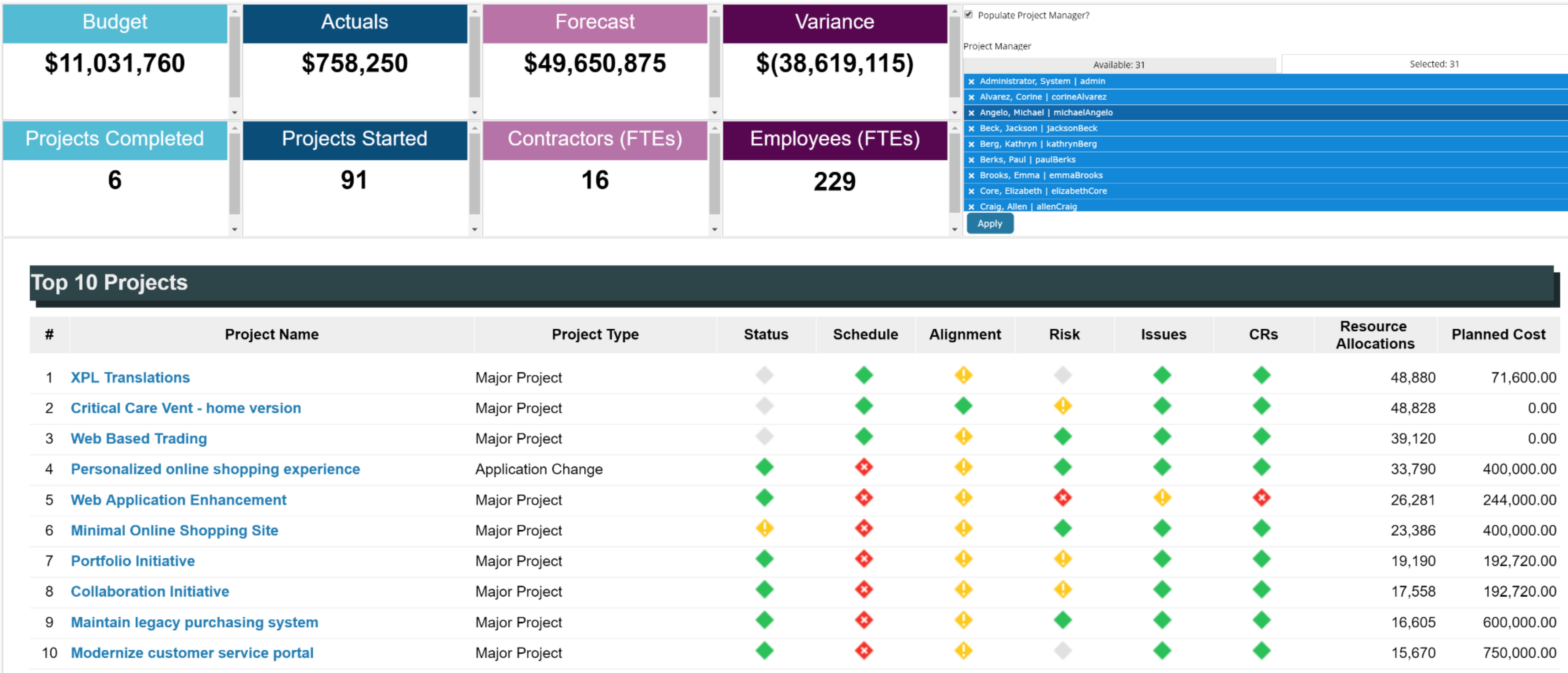
Key Accomplishments

Page 1 of 10

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

OOTB Metrics – Project/Program – Health

Jaspersoft
Dashboard



Budget	Actuals	Forecast	Variance
$11,031,760	$758,250	$49,650,875	$(38,619,115)

Projects Completed	Projects Started	Contractors (FTEs)	Employees (FTEs)
6	91	16	229

☑ Populate Project Manager?

Project Manager

Available: 31 | Selected: 31

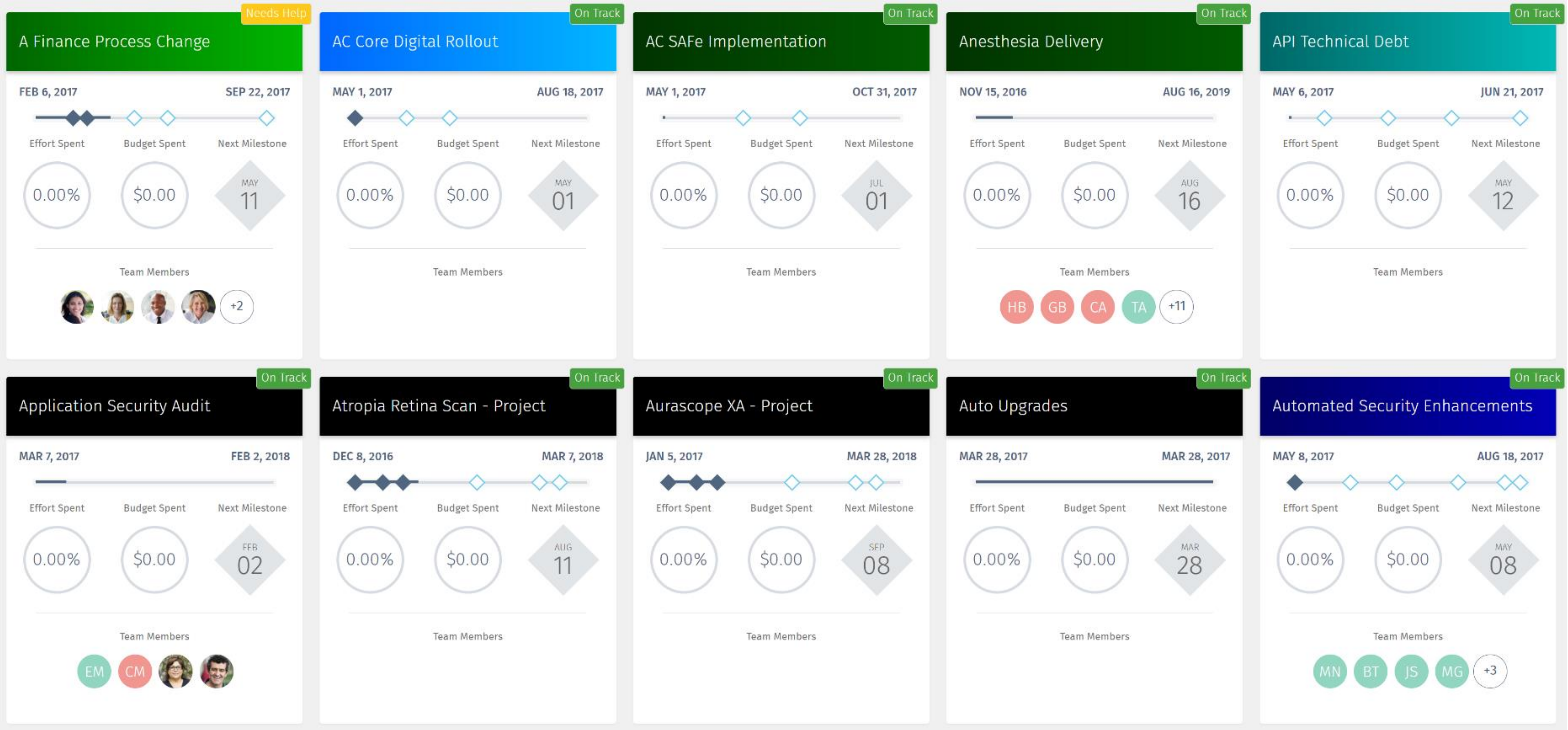
- × Administrator, System | admin
- × Alvarez, Corine | corineAlvarez
- × Angelo, Michael | michaelAngelo
- × Beck, Jackson | jacksonBeck
- × Berg, Kathryn | kathrynBerg
- × Berks, Paul | paulBerks
- × Brooks, Emma | emmaBrooks
- × Core, Elizabeth | elizabethCore
- × Craig, Allen | allenCraig

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

Portlet



A Finance Process Change
Needs Help
FEB 6, 2017
SEP 22, 2017
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
MAY 11
Team Members
+2

AC Core Digital Rollout
On Track
MAY 1, 2017
AUG 18, 2017
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
MAY 01
Team Members

AC SAFe Implementation
On Track
MAY 1, 2017
OCT 31, 2017
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
JUL 01
Team Members

Anesthesia Delivery
On Track
NOV 15, 2016
AUG 16, 2019
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
AUG 16
Team Members
HB GB CA TA +11

API Technical Debt
On Track
MAY 6, 2017
JUN 21, 2017
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
MAY 12
Team Members

Application Security Audit
On Track
MAR 7, 2017
FEB 2, 2018
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
FEB 02
Team Members
EM CM

Atropia Retina Scan - Project
On Track
DEC 8, 2016
MAR 7, 2018
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
AUG 11
Team Members

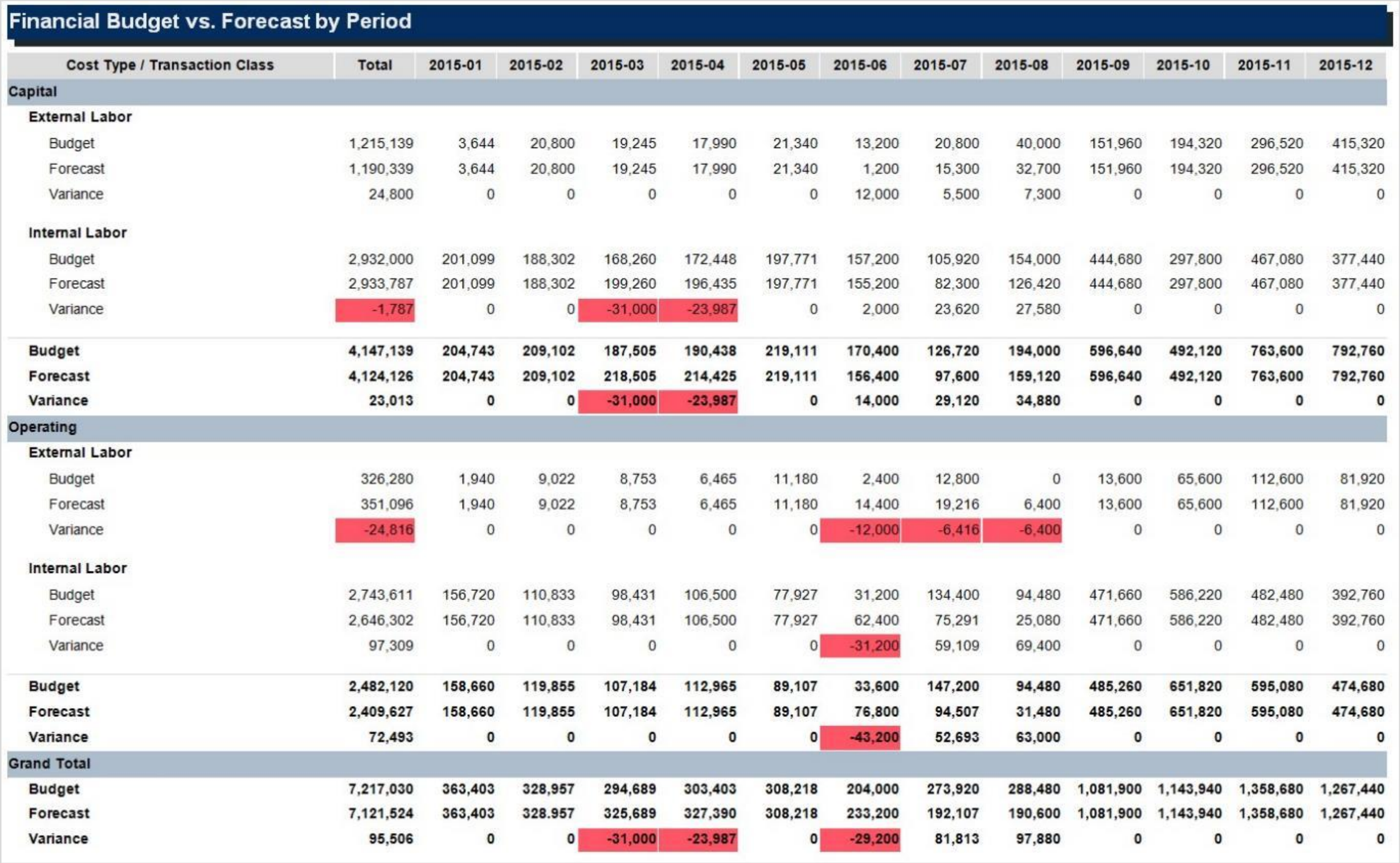
Aurascope XA - Project
On Track
JAN 5, 2017
MAR 28, 2018
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
SEP 08
Team Members

Auto Upgrades
On Track
MAR 28, 2017
MAR 28, 2017
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
MAR 28
Team Members

Automated Security Enhancements
On Track
MAY 8, 2017
AUG 18, 2017
Effort Spent
Budget Spent
Next Milestone
0.00%
$0.00
MAY 08
Team Members
MN BT JS MG +3

OOTB Metrics – Financial

Jaspersoft
Studio

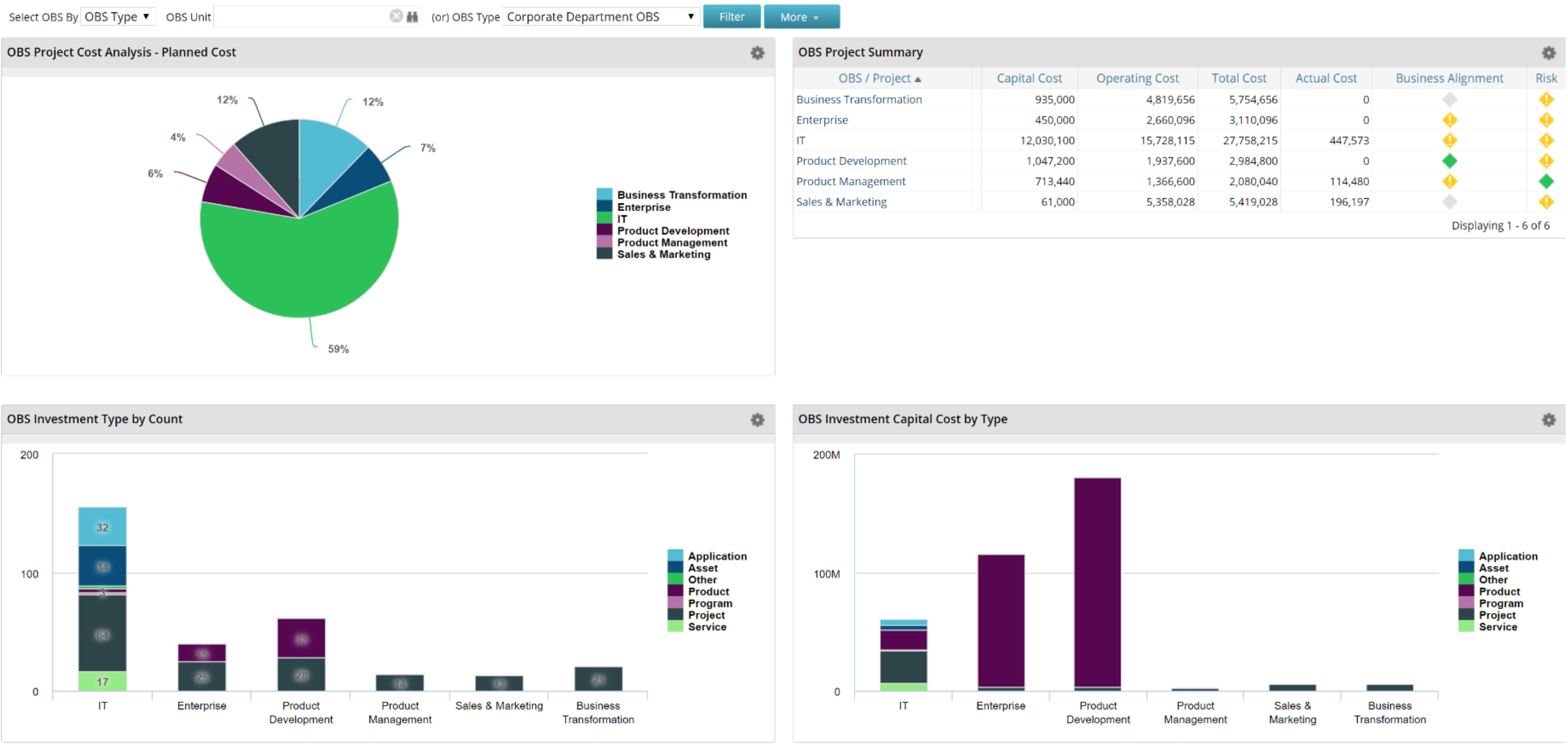


Financial Budget vs. Forecast by Period

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

Portlet


Select OBS By
OBS Type
OBS Unit
(or) OBS Type
Corporate Department OBS
Filter
More
OBS Project Cost Analysis - Planned Cost
12%
12%
7%
4%
6%
59%
Business Transformation
Enterprise
IT
Product Development
Product Management
Sales & Marketing
OBS Investment Type by Count
200
100
0
32
34
3
64
17
15
25
33
28
14
13
21
IT
Enterprise
Product Development
Product Management
Sales & Marketing
Business Transformation
Application
Asset
Other
Product
Program
Project
Service
OBS Investment Capital Cost by Type
200M
100M
0
IT
Enterprise
Product Development
Product Management
Sales & Marketing
Business Transformation
Application
Asset
Other
Product
Program
Project
Service

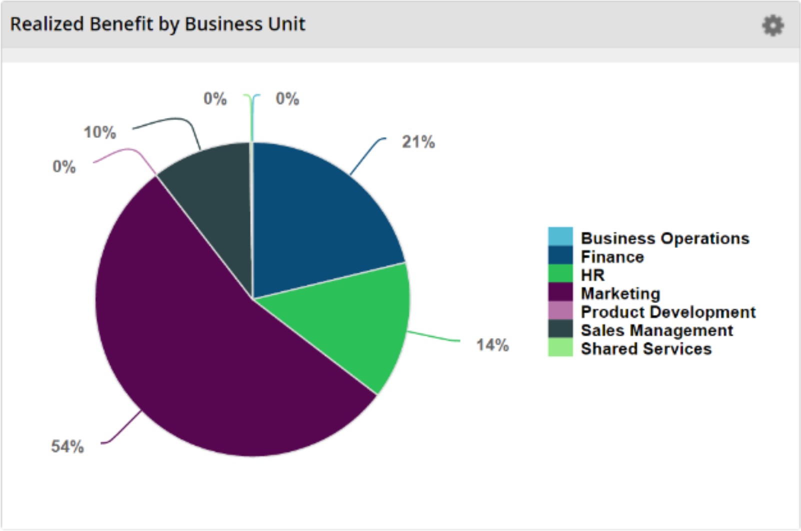
OBS Project Summary

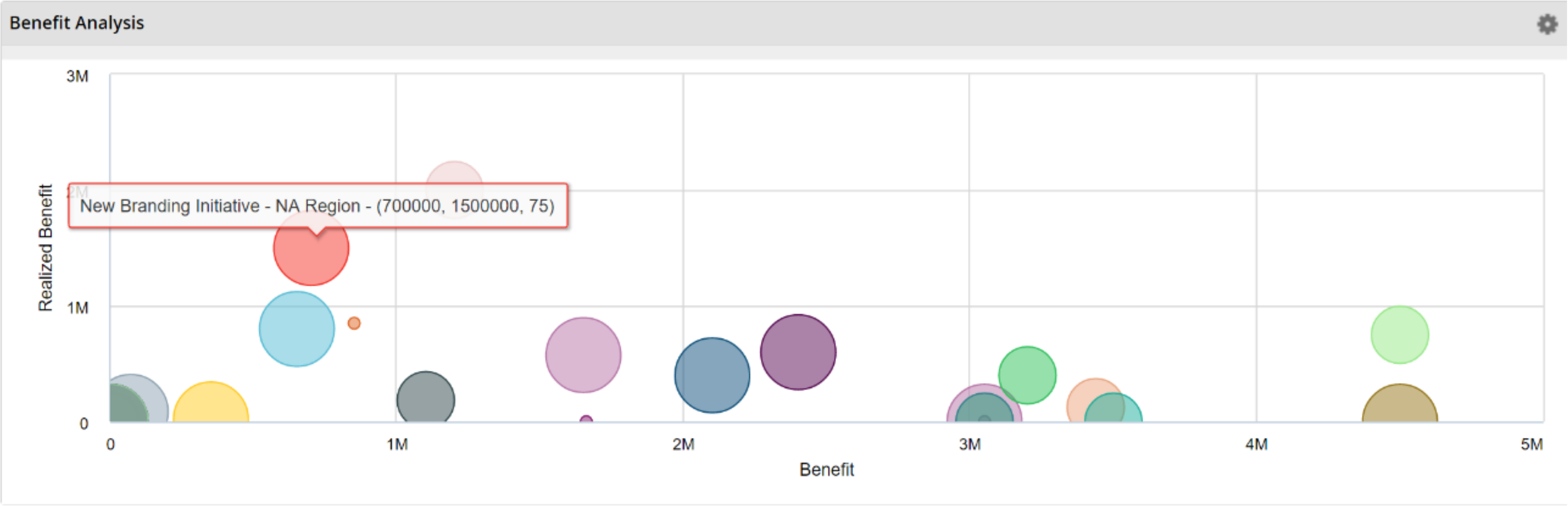
OBS / Project ▲	Capital Cost	Operating Cost	Total Cost	Actual Cost	Business Alignment	Risk
Business Transformation	935,000	4,819,656	5,754,656	0	◇	⚠
Enterprise	450,000	2,660,096	3,110,096	0	⚠	⚠
IT	12,030,100	15,728,115	27,758,215	447,573	⚠	⚠
Product Development	1,047,200	1,937,600	2,984,800	0	◆	⚠
Product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

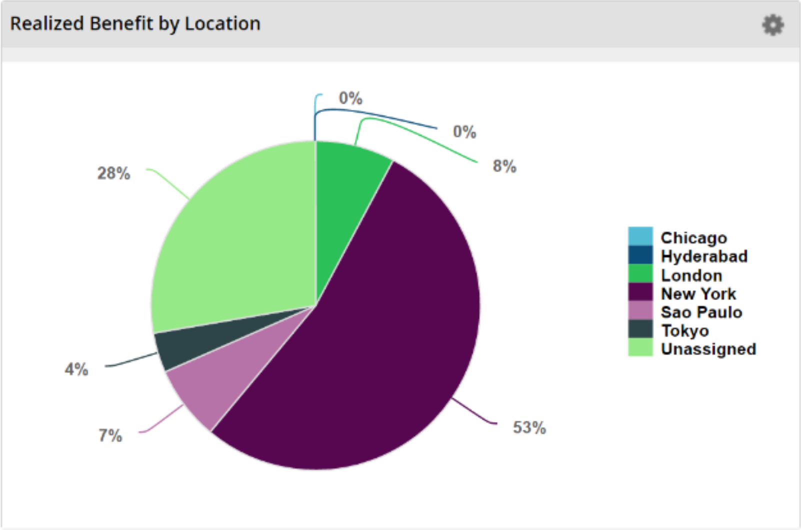
Displaying 1 - 6 of 6

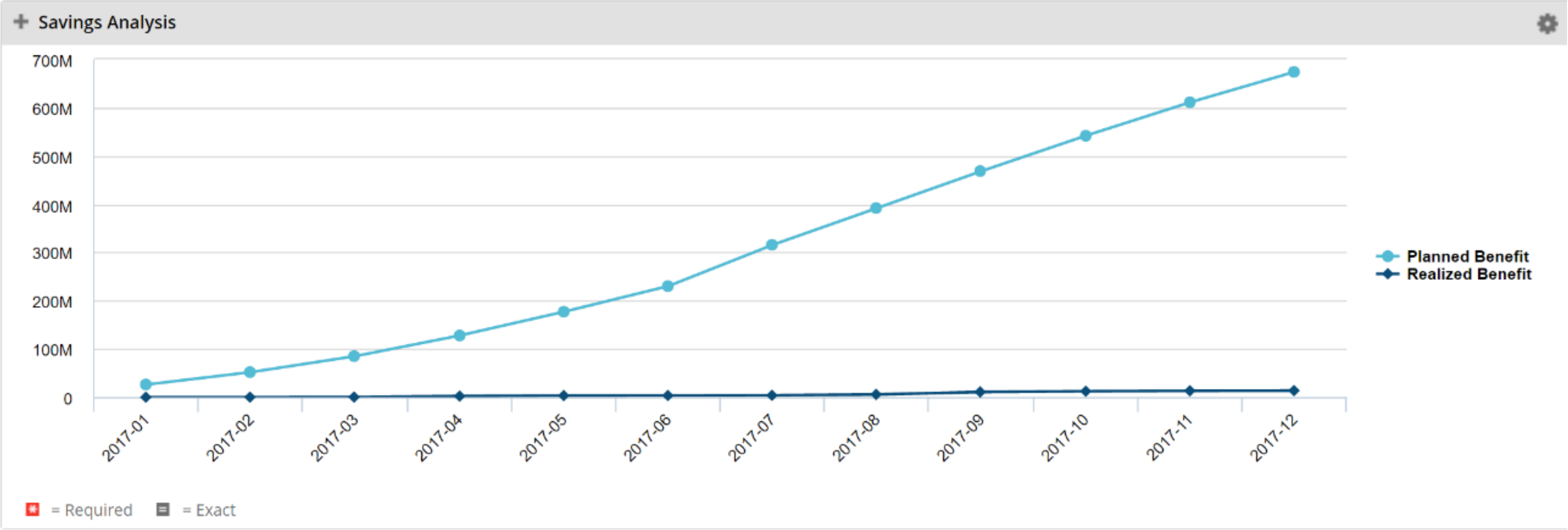
OOTB Metrics – Financial

Portlet


Realized Benefit by Business Unit
0%
0%
10%
21%
0%
14%
54%
Business Operations
Finance
HR
Marketing
Product Development
Sales Management
Shared Services

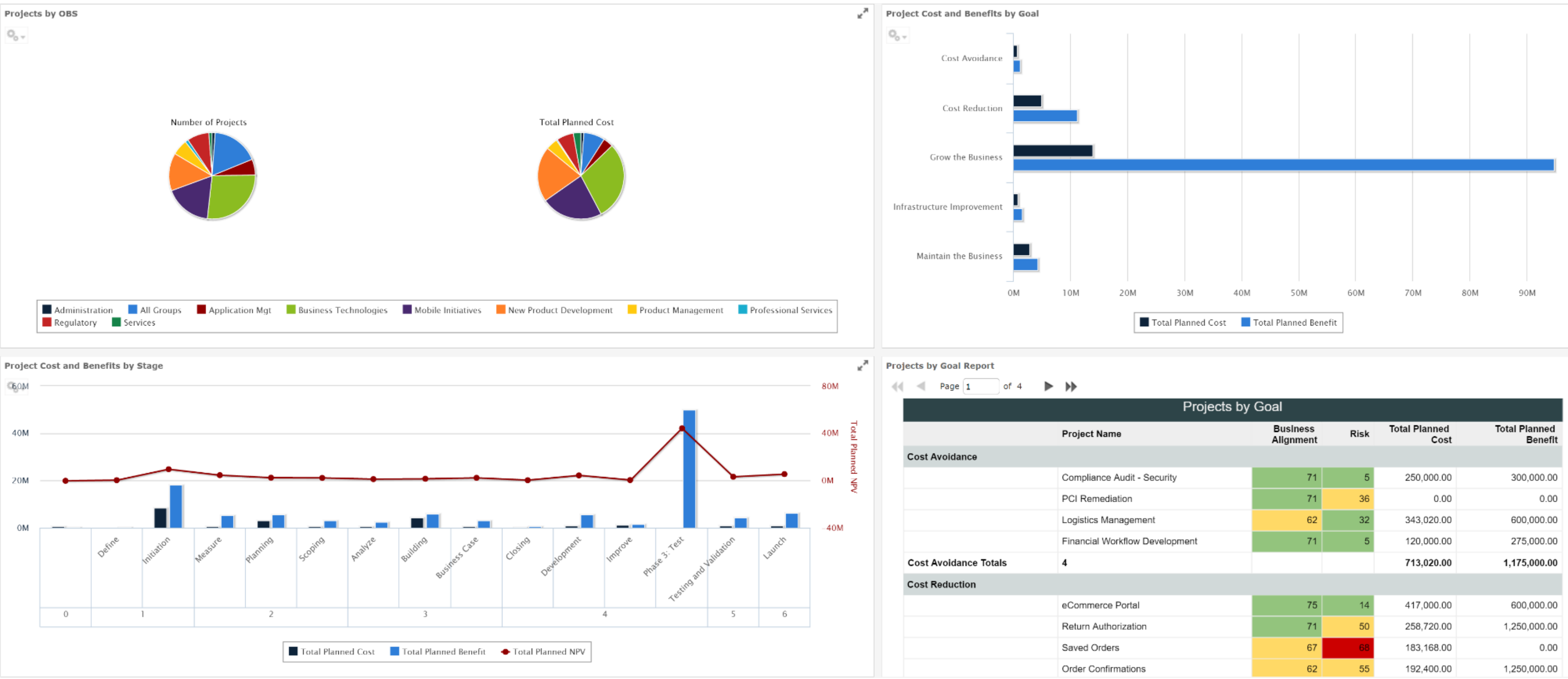

New Branding Initiative - NA Region - (700000, 1500000, 75)
Benefit Analysis
3M
2M
1M
0
Realized Benefit
0
1M
2M
3M
4M
5M
Benefit


Realized Benefit by Location
0%
0%
28%
8%
4%
7%
53%
Chicago
Hyderabad
London
New York
Sao Paulo
Tokyo
Unassigned


Savings Analysis
700M
600M
500M
400M
300M
200M
100M
0
2017-01
2017-02
2017-03
2017-04
2017-05
2017-06
2017-07
2017-08
2017-09
2017-10
2017-11
2017-12
Planned Benefit
Realized Benefit
= Required
= Exact

OOTB Metrics – Financial

Jaspersoft Dashboard

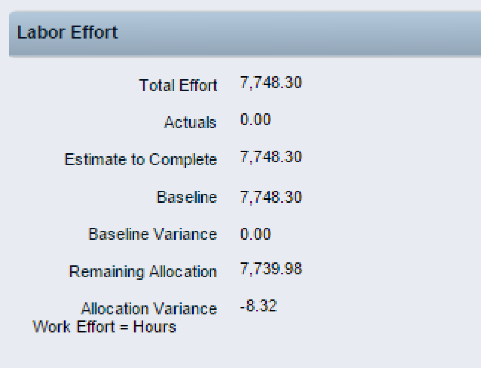

Projects by OBS
Number of Projects
Total Planned Cost
Administration
All Groups
Application Mgt
Business Technologies
Mobile Initiatives
New Product Development
Product Management
Professional Services
Regulatory
Services
Project Cost and Benefits by Goal
Cost Avoidance
Cost Reduction
Grow the Business
Infrastructure Improvement
Maintain the Business
0M
10M
20M
30M
40M
50M
60M
70M
80M
90M
Total Planned Cost
Total Planned Benefit
Project Cost and Benefits by Stage
60M
40M
20M
0M
80M
40M
0M
-40M
Total Planned NPV
Define
Initiation
Measure
Planning
Scoping
Analyze
Building
Business Case
Closing
Development
Improve
Phase 3: Test
Testing and Validation
Launch
0
1
2
3
4
5
6
Total Planned Cost
Total Planned Benefit
Total Planned NPV
Projects by Goal Report
Page 1 of 4

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

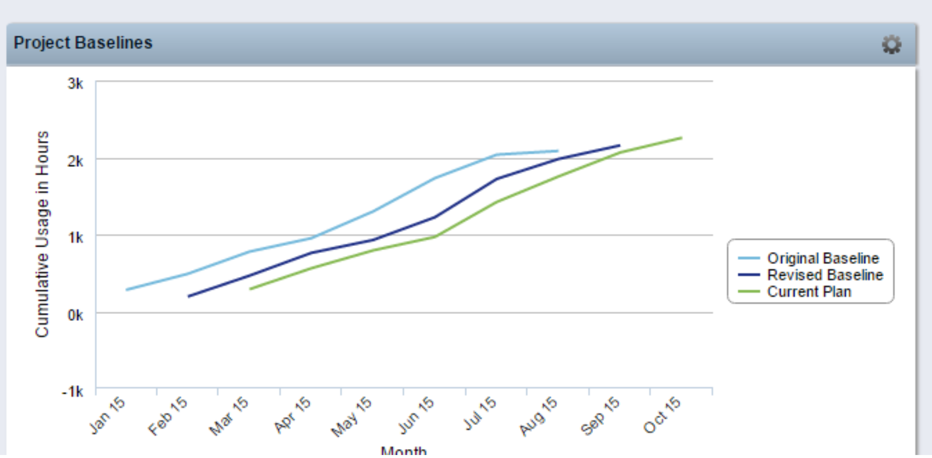
Portlet



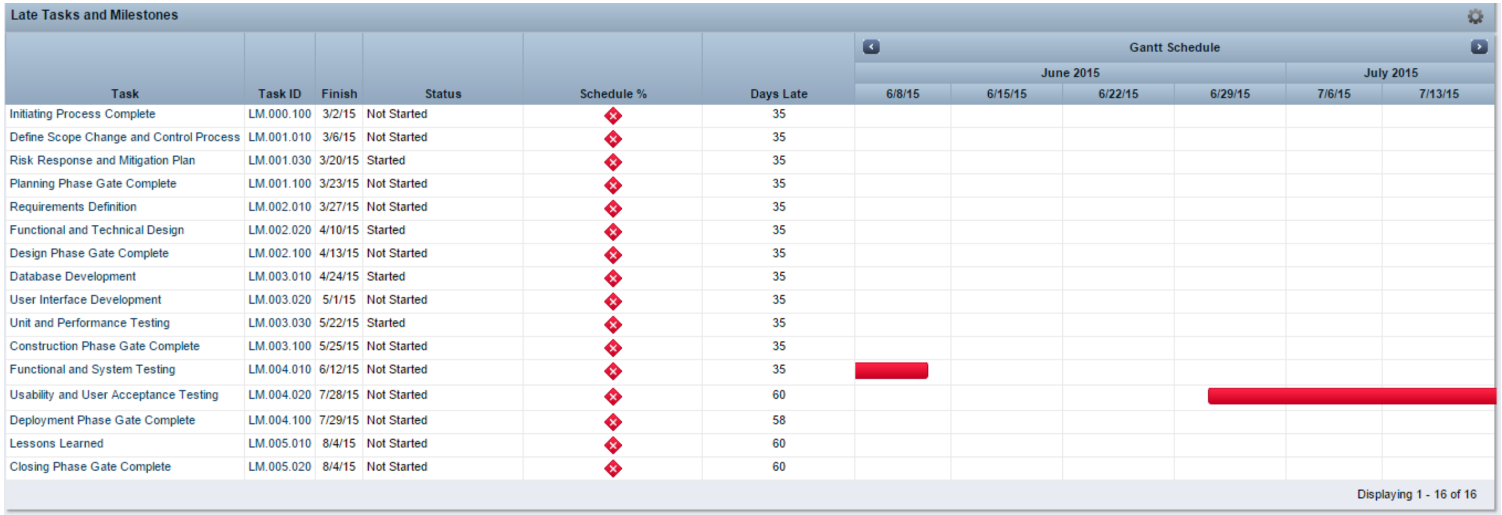
Labor Effort

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



Project Baselines



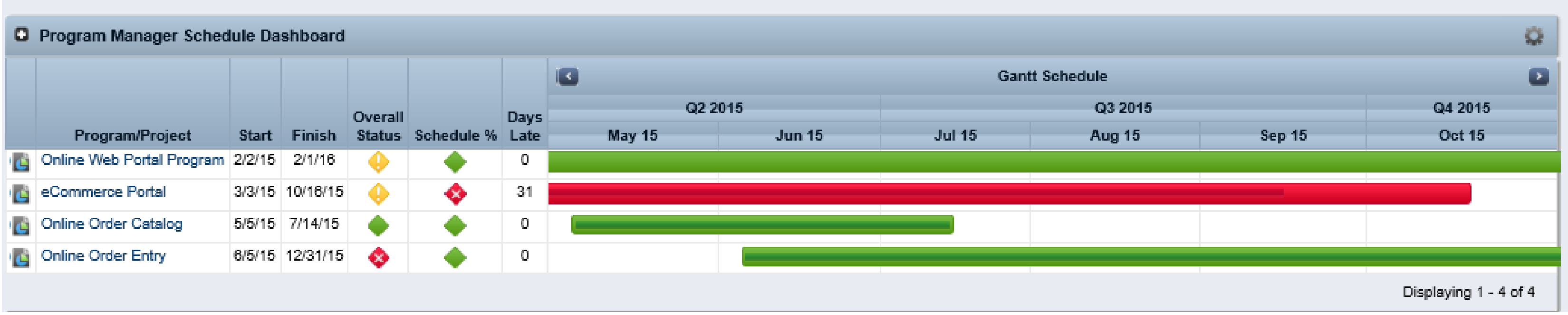
Late Tasks and Milestones

Task	Task ID	Finish	Status	Schedule %	Days Late
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

Displaying 1 - 16 of 16

OOTB Metrics – Project/Program

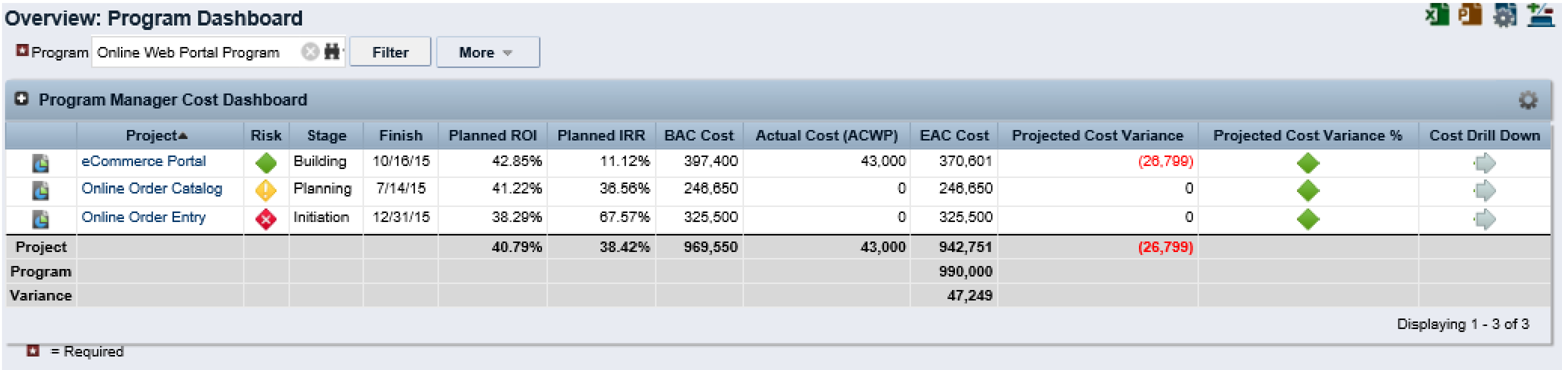
Portlet



Program Manager Schedule Dashboard

	Program/Project	Start	Finish	Overall Status	Schedule %	Days Late
	Online Web Portal Program	2/2/15	2/1/16	⚠	◆	0
	eCommerce Portal	3/3/15	10/16/15	⚠	✖	31
	Online Order Catalog	5/5/15	7/14/15	◆	◆	0
	Online Order Entry	6/5/15	12/31/15	✖	◆	0

Displaying 1 - 4 of 4



Overview: Program Dashboard

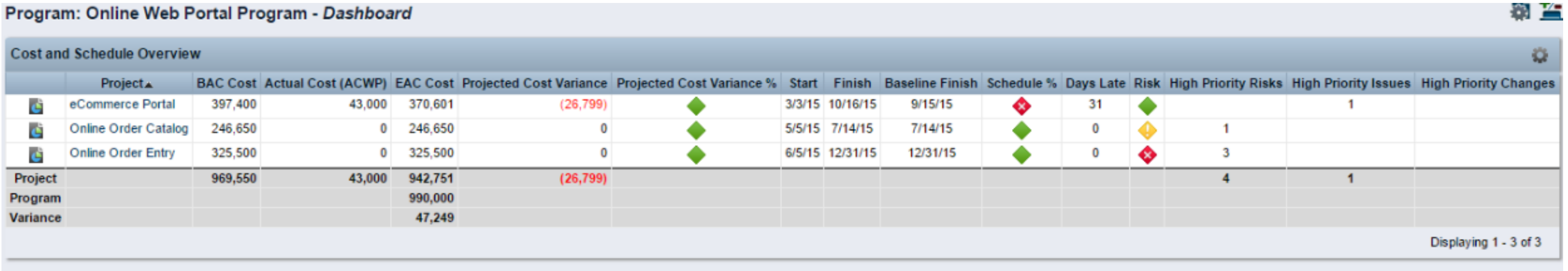
Program: Online Web Portal Program

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%	36.56%	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**			

Displaying 1 - 3 of 3

■ = Required



Program: Online Web Portal Program - *Dashboard*

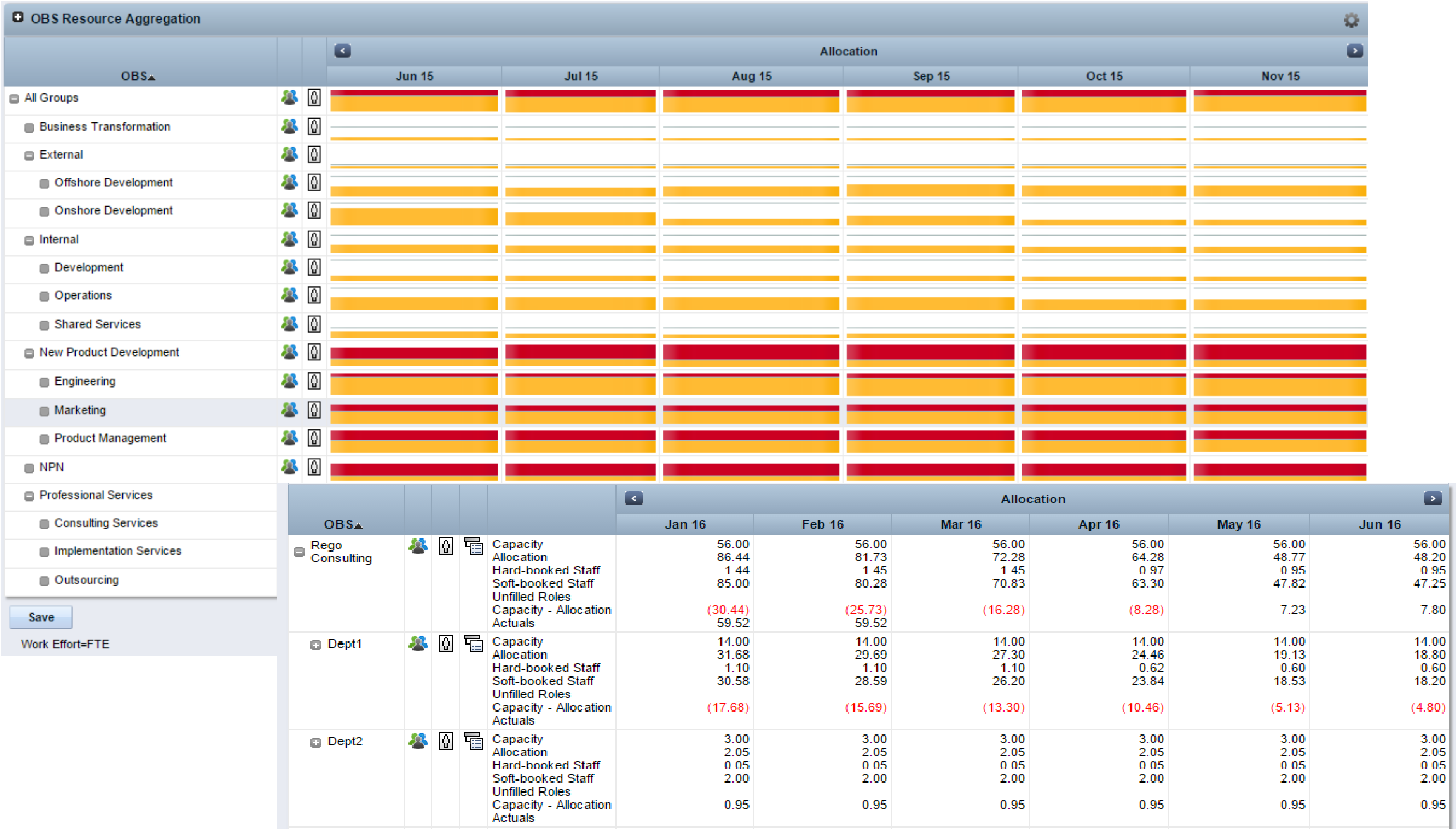
Cost and Schedule Overview

	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	
	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

Portlet



- 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

Work Effort=FTE

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

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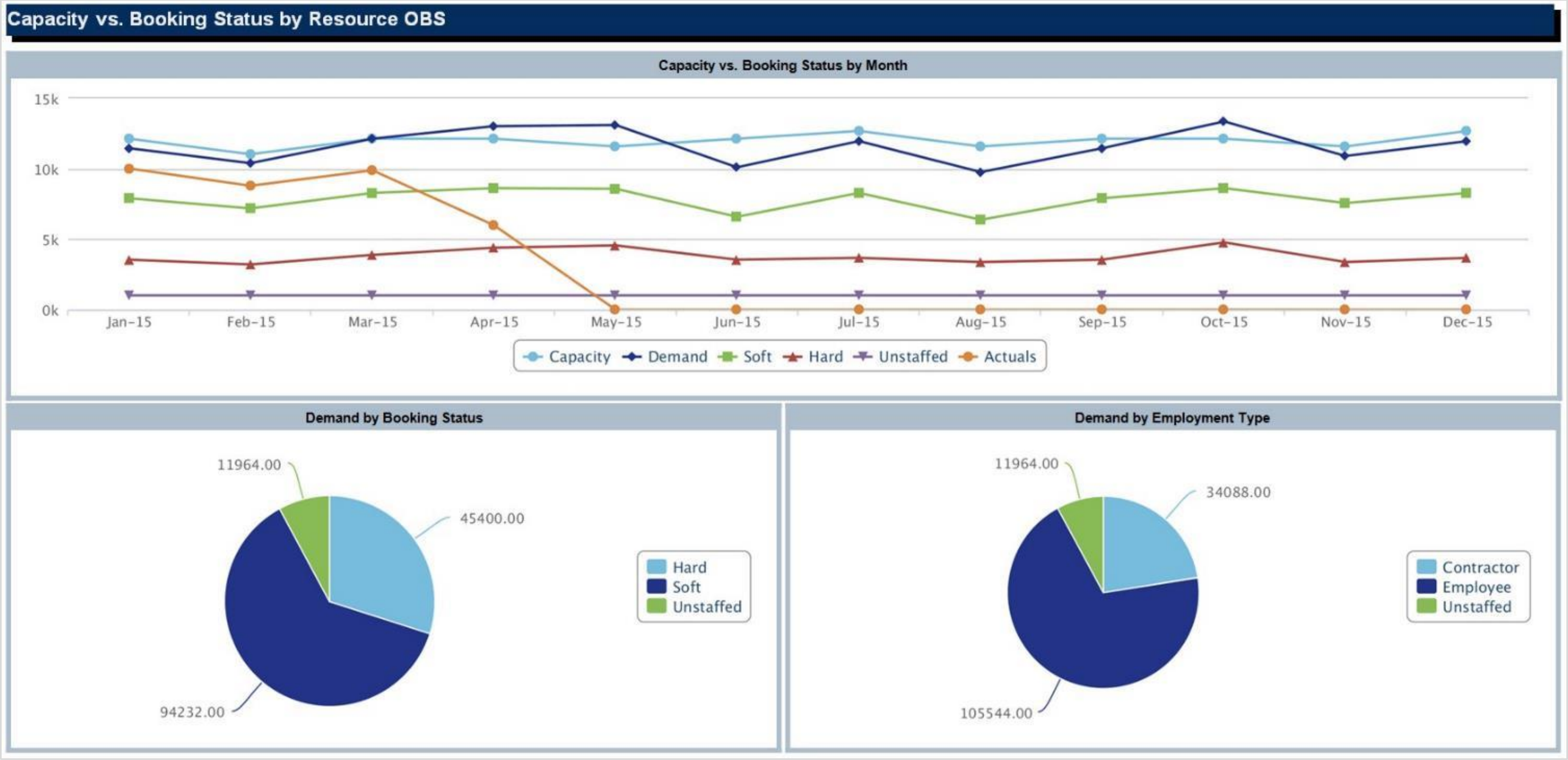
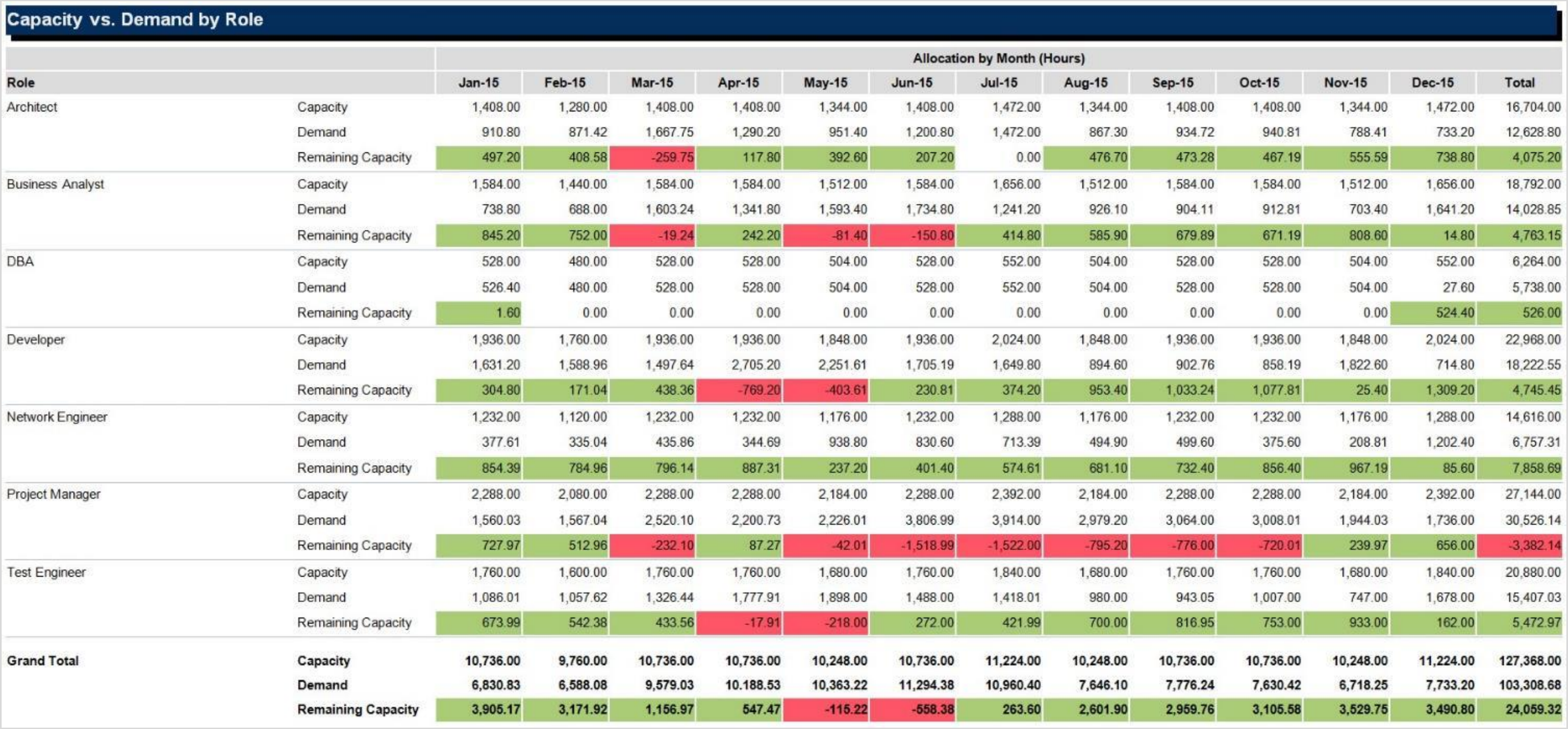

Capacity vs. Booking Status by Resource OBS
Capacity vs. Booking Status by Month
15k
10k
5k
0k
Jan-15
Feb-15
Mar-15
Apr-15
May-15
Jun-15
Jul-15
Aug-15
Sep-15
Oct-15
Nov-15
Dec-15
Capacity
Demand
Soft
Hard
Unstaffed
Actuals
Demand by Booking Status
11964.00
45400.00
94232.00
Hard
Soft
Unstaffed
Demand by Employment Type
11964.00
34088.00
105544.00
Contractor
Employee
Unstaffed

OOTB Metrics – Resource

Jaspersoft Studio

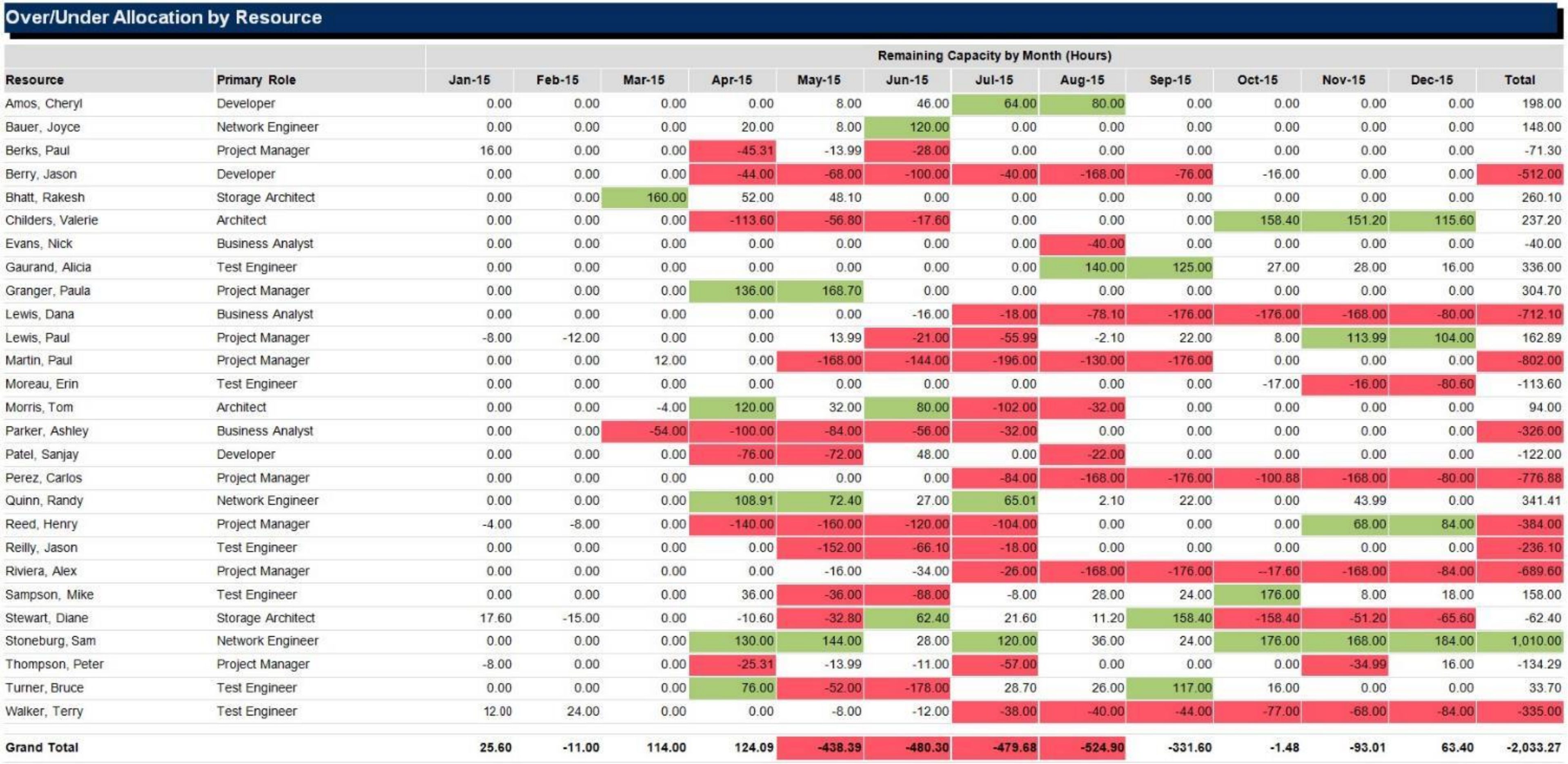


Capacity vs. Demand by Role

		Allocation by Month (Hours)												
Role		**Jan-15**	**Feb-15**	**Mar-15**	**Apr-15**	**May-15**	**Jun-15**	**Jul-15**	**Aug-15**	**Sep-15**	**Oct-15**	**Nov-15**	**Dec-15**	**Total**
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	1,086.01	1,057.62	1,326.44	1,777.91	1,898.00	1,488.00	1,418.01	980.00	943.05	1,007.00	747.00	1,678.00	15,407.03
	Remaining Capacity	673.99	542.38	433.56	-17.91	-218.00	272.00	421.99	700.00	816.95	753.00	933.00	162.00	5,472.97
Grand Total	**Capacity**	**10,736.00**	**9,760.00**	**10,736.00**	**10,736.00**	**10,248.00**	**10,736.00**	**11,224.00**	**10,248.00**	**10,736.00**	**10,736.00**	**10,248.00**	**11,224.00**	**127,368.00**
	Demand	**6,830.83**	**6,588.08**	**9,579.03**	**10.188.53**	**10,363.22**	**11,294.38**	**10,960.40**	**7,646.10**	**7,776.24**	**7,630.42**	**6,718.25**	**7,733.20**	**103,308.68**
	Remaining Capacity	**3,905.17**	**3,171.92**	**1,156.97**	**547.47**	**-115.22**	**-558.38**	**263.60**	**2,601.90**	**2,959.76**	**3,105.58**	**3,529.75**	**3,490.80**	**24,059.32**

OOTB Metrics – Resource

Jaspersoft Studio

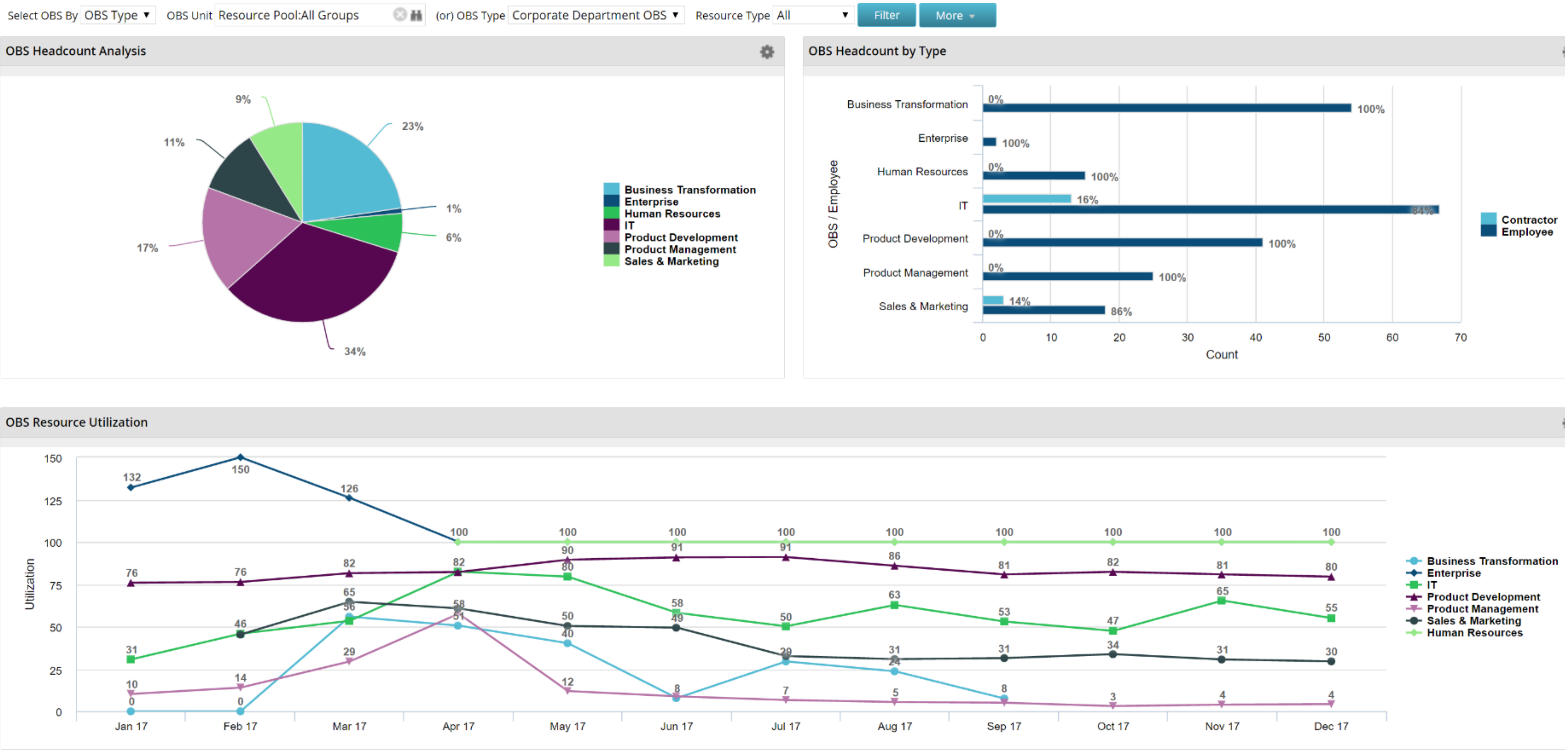


Over/Under Allocation by Resource

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

Portlet



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
9%
23%
11%
1%
6%
17%
34%
Business Transformation
Enterprise
Human Resources
IT
Product Development
Product Management
Sales & Marketing
OBS Headcount by Type
Business Transformation
Enterprise
Human Resources
IT
Product Development
Product Management
Sales & Marketing
0%
100%
100%
0%
100%
16%
84%
0%
100%
0%
100%
14%
86%
OBS / Employee
0
10
20
30
40
50
60
70
Count
Contractor
Employee
OBS Resource Utilization
Utilization
150
125
100
75
50
25
0
Jan 17
Feb 17
Mar 17
Apr 17
May 17
Jun 17
Jul 17
Aug 17
Sep 17
Oct 17
Nov 17
Dec 17
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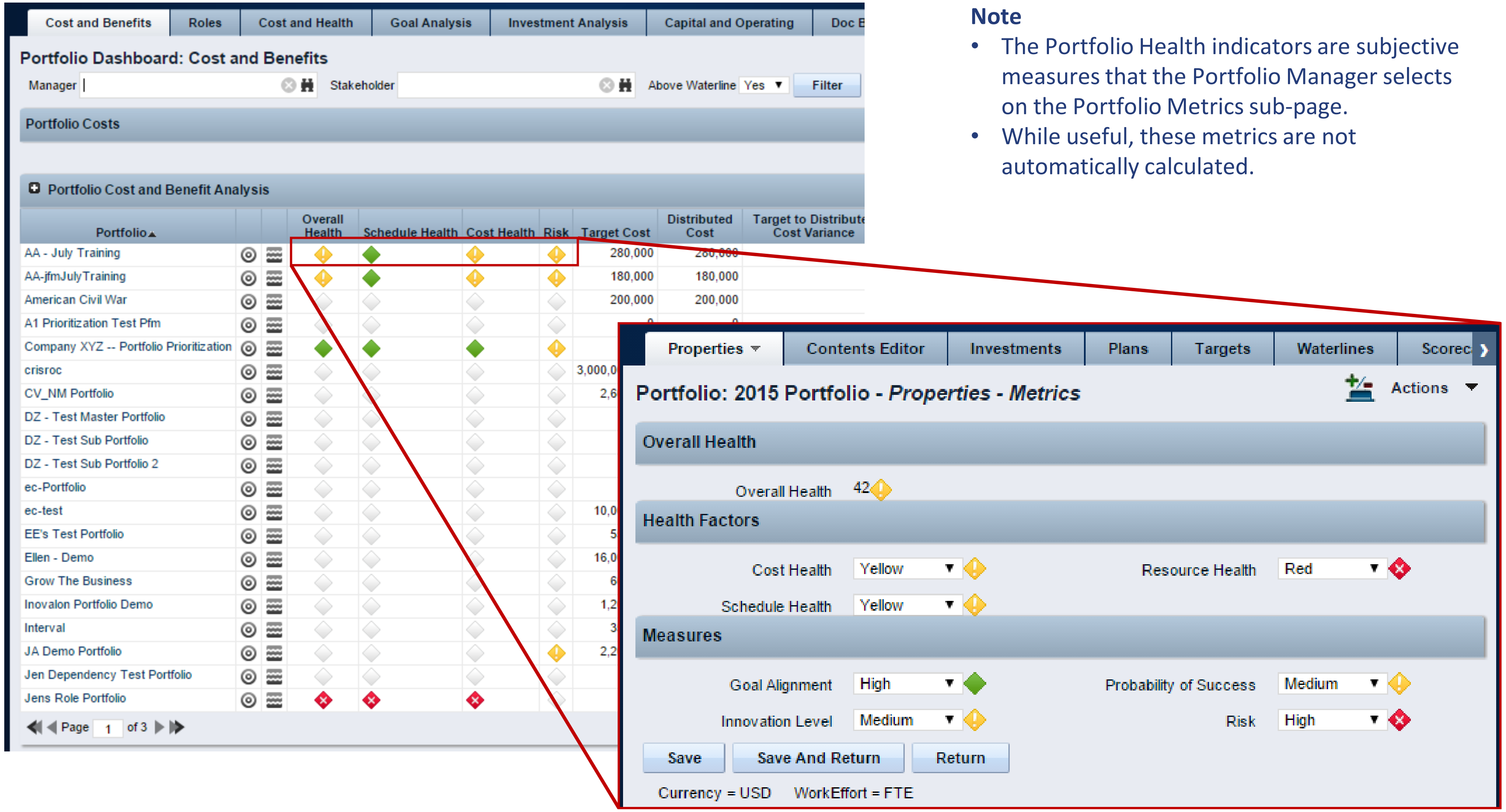
4
4
Business Transformation
Enterprise
IT
Product Development
Product Management
Sales & Marketing
Human Resources

OOTB Metrics – Portfolio

“Show me the health of my portfolios.”



Cost and Benefits | Roles | Cost and Health | Goal Analysis | Investment Analysis | Capital and Operating | Doc E

Portfolio Dashboard: Cost and Benefits

Manager | Stakeholder | Above Waterline: Yes | Filter

Portfolio Costs

Portfolio Cost and Benefit Analysis

Portfolio▲			Overall Health	Schedule Health	Cost Health	Risk	Target Cost	Distributed Cost	Target to Distribute Cost Variance
AA - July Training	◎	☰	🟨	🟩	🟨	🟨	280,000	280,000	
AA-jfmJulyTraining	◎	☰	🟨	🟩	🟨	🟨	180,000	180,000	
American Civil War	◎	☰	◇	◇	◇	◇	200,000	200,000	
A1 Prioritization Test Pfm	◎	☰	◇	◇	◇	◇	0	0	
Company XYZ -- Portfolio Prioritization	◎	☰	🟩	🟩	🟩	🟨			
crisroc	◎	☰	◇	◇	◇	◇	3,000,0		
CV_NM Portfolio	◎	☰	◇	◇	◇	◇	2,6		
DZ - Test Master Portfolio	◎	☰	◇	◇	◇	◇			
DZ - Test Sub Portfolio	◎	☰	◇	◇	◇	◇			
DZ - Test Sub Portfolio 2	◎	☰	◇	◇	◇	◇			
ec-Portfolio	◎	☰	◇	◇	◇	◇			
ec-test	◎	☰	◇	◇	◇	◇	10,0		
EE's Test Portfolio	◎	☰	◇	◇	◇	◇	5		
Ellen - Demo	◎	☰	◇	◇	◇	◇	16,0		
Grow The Business	◎	☰	◇	◇	◇	◇	6		
Inovalon Portfolio Demo	◎	☰	◇	◇	◇	◇	1,2		
Interval	◎	☰	◇	◇	◇	◇	3		
JA Demo Portfolio	◎	☰	◇	◇	◇	🟨	2,2		
Jen Dependency Test Portfolio	◎	☰	◇	◇	◇	◇			
Jens Role Portfolio	◎	☰	🟥	🟥	🟥	◇			

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Properties | Contents Editor | Investments | Plans | Targets | Waterlines | Scorec

Portfolio: 2015 Portfolio - *Properties - Metrics*

Actions

Overall Health

Overall Health: 42 🟨

Health Factors

Cost Health: Yellow 🟨
Resource Health: Red 🟥
Schedule Health: Yellow 🟨

Measures

Goal Alignment: High 🟩
Probability of Success: Medium 🟨
Innovation Level: Medium 🟨
Risk: High 🟥

Save | Save And Return | Return

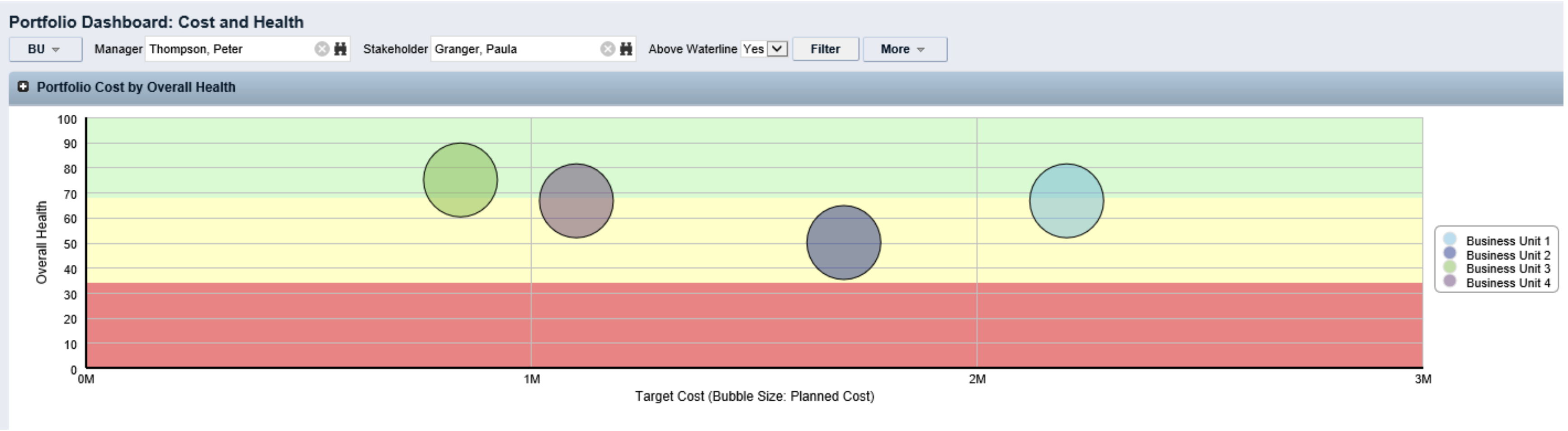
Currency = USD   WorkEffort = FTE

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.

OOTB Metrics – Portfolio

Portlet



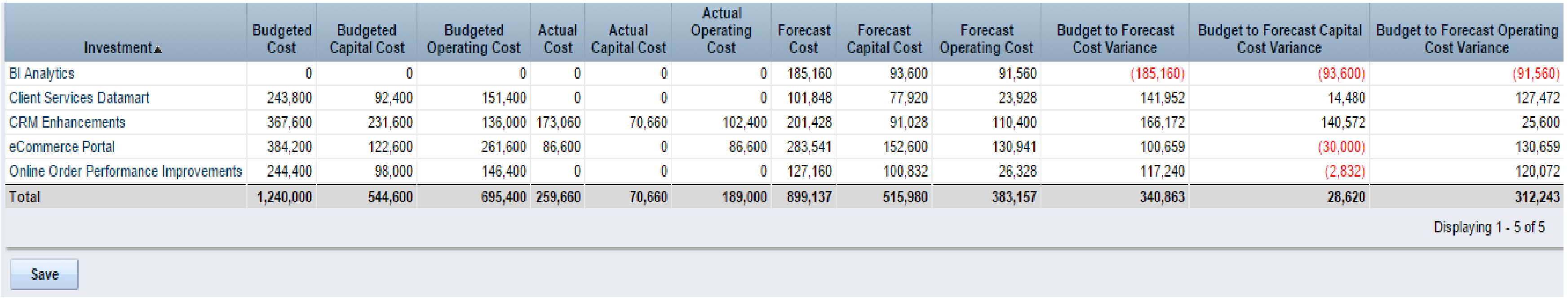
Portfolio Dashboard: Cost and Health

Manager Thompson, Peter

Stakeholder Granger, Paula

Above Waterline Yes

BU
Filter
More
Portfolio Cost by Overall Health
Overall Health
100
90
80
70
60
50
40
30
20
10
0
0M
1M
2M
3M
Target Cost (Bubble Size: Planned Cost)
Business Unit 1
Business Unit 2
Business Unit 3
Business Unit 4



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

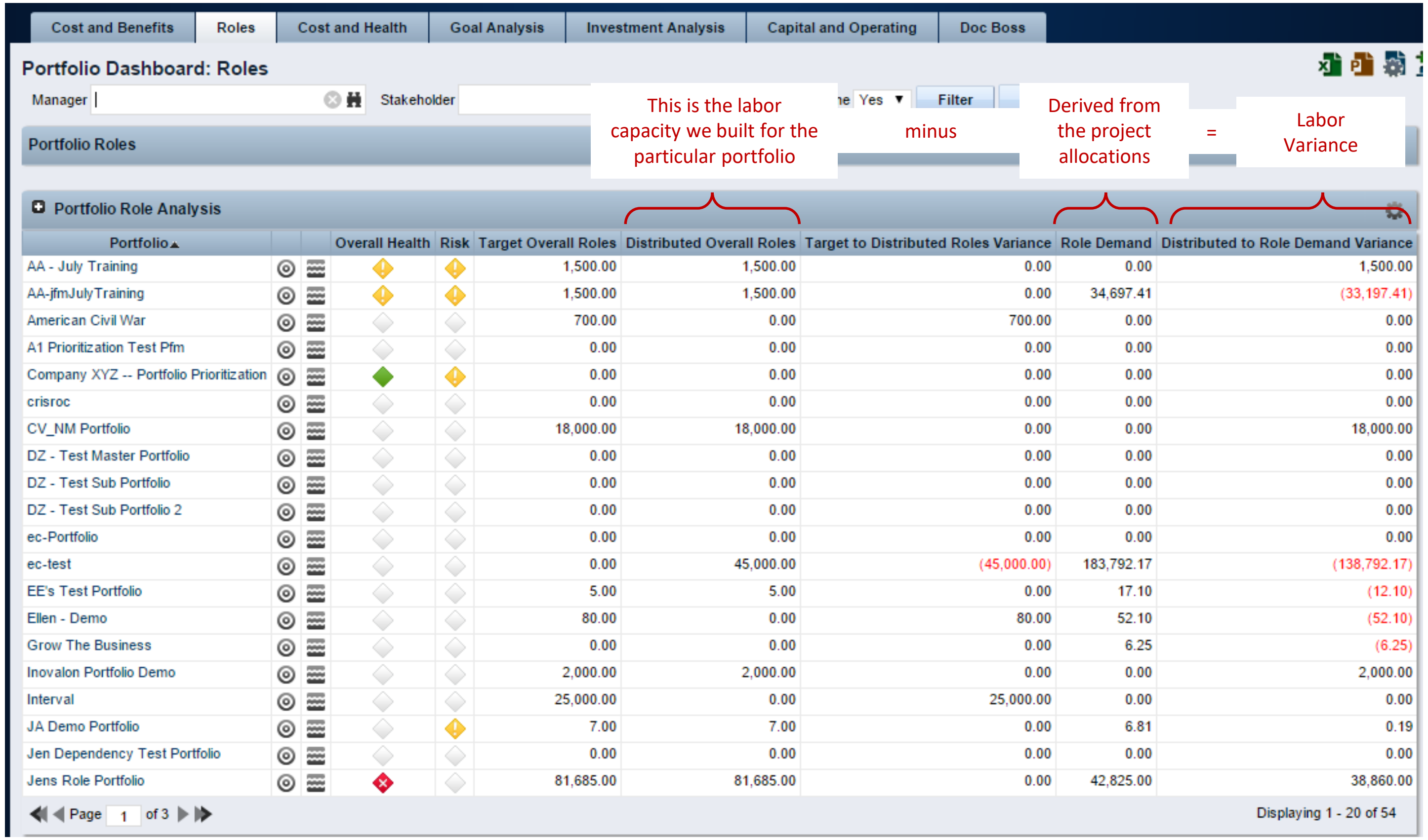
Let Rego be your guide.

regoUniversity2021

OOTB Metrics – Portfolio

Portlet

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


Cost and Benefits
Roles
Cost and Health
Goal Analysis
Investment Analysis
Capital and Operating
Doc Boss
Portfolio Dashboard: Roles
Manager
Stakeholder
Yes
Filter
Portfolio Roles

This is the labor capacity we built for the particular portfolio

minus

Derived from the project allocations

=

Labor Variance

Portfolio Role Analysis

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

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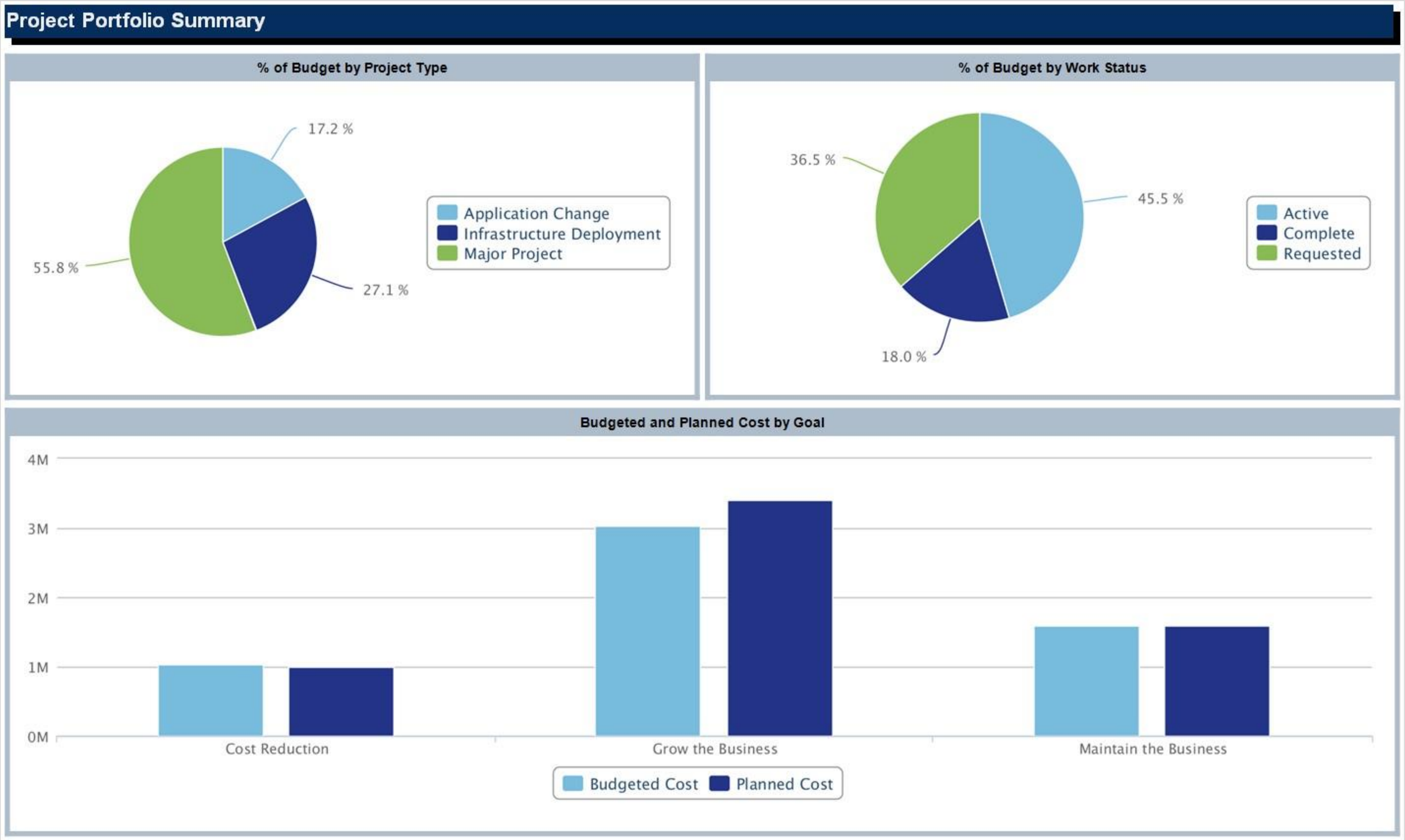
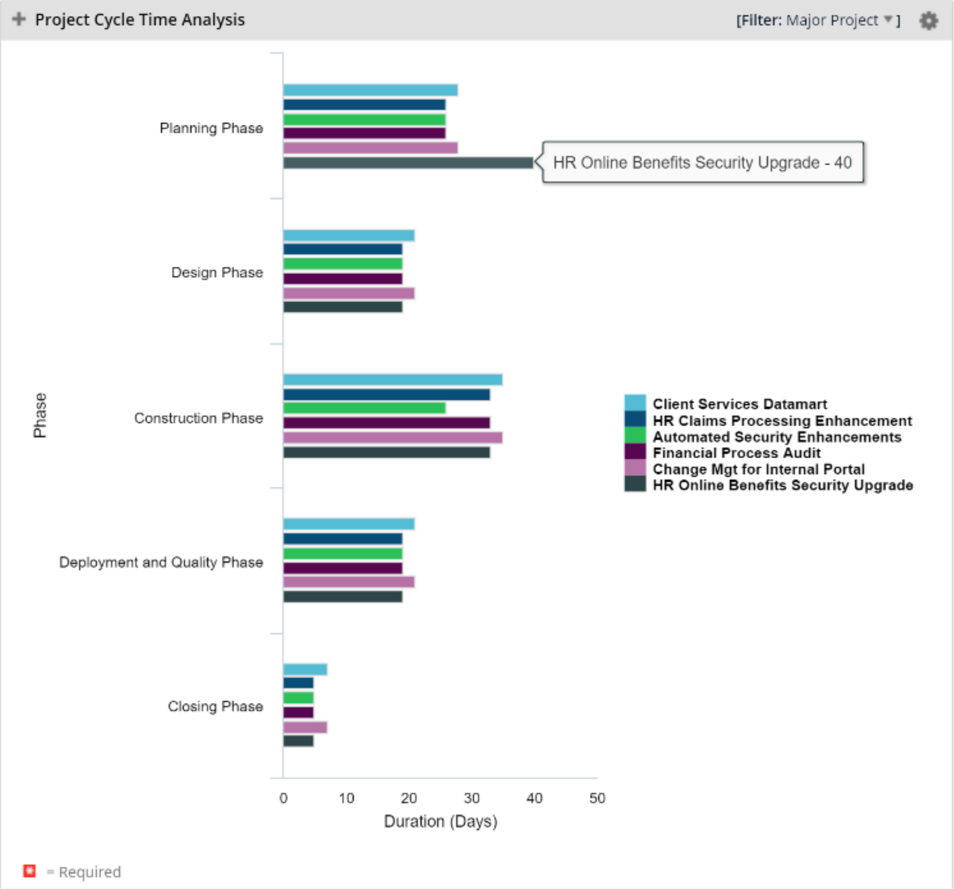
OOTB Metrics – Portfolio

Jaspersoft Studio



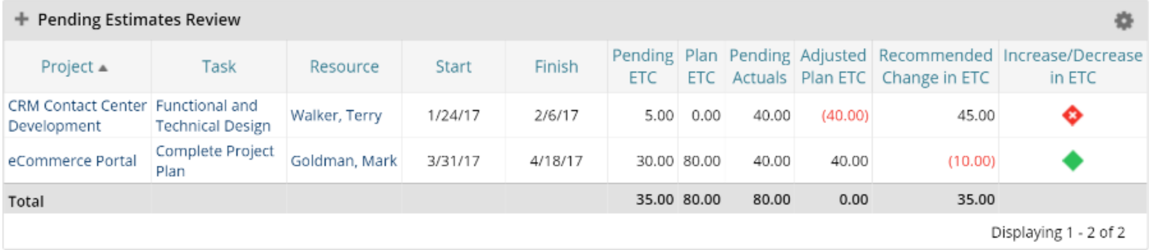
OOTB Metrics – Portfolio

Portlet



Project Cycle Time Analysis [Filter: Major Project ▾]

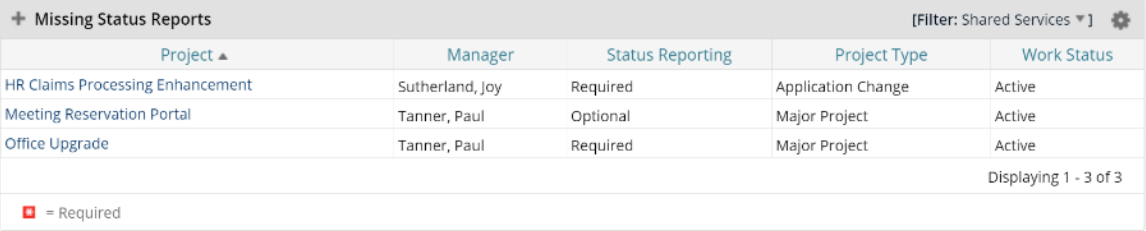
🟥 = Required



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

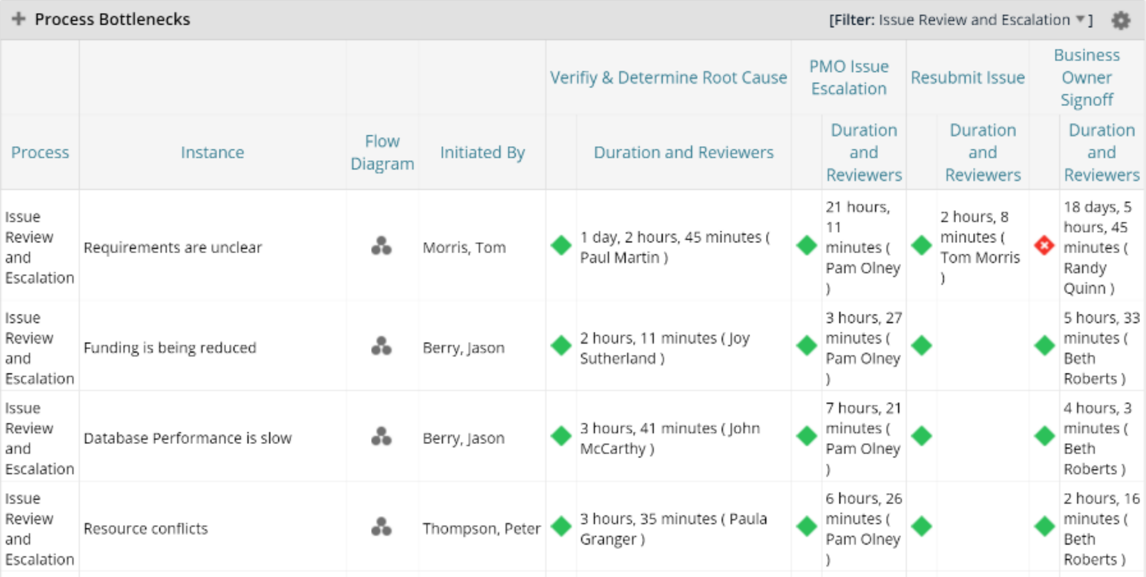


Missing Status Reports [Filter: Shared Services ▾]

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

Displaying 1 - 3 of 3

🟥 = Required

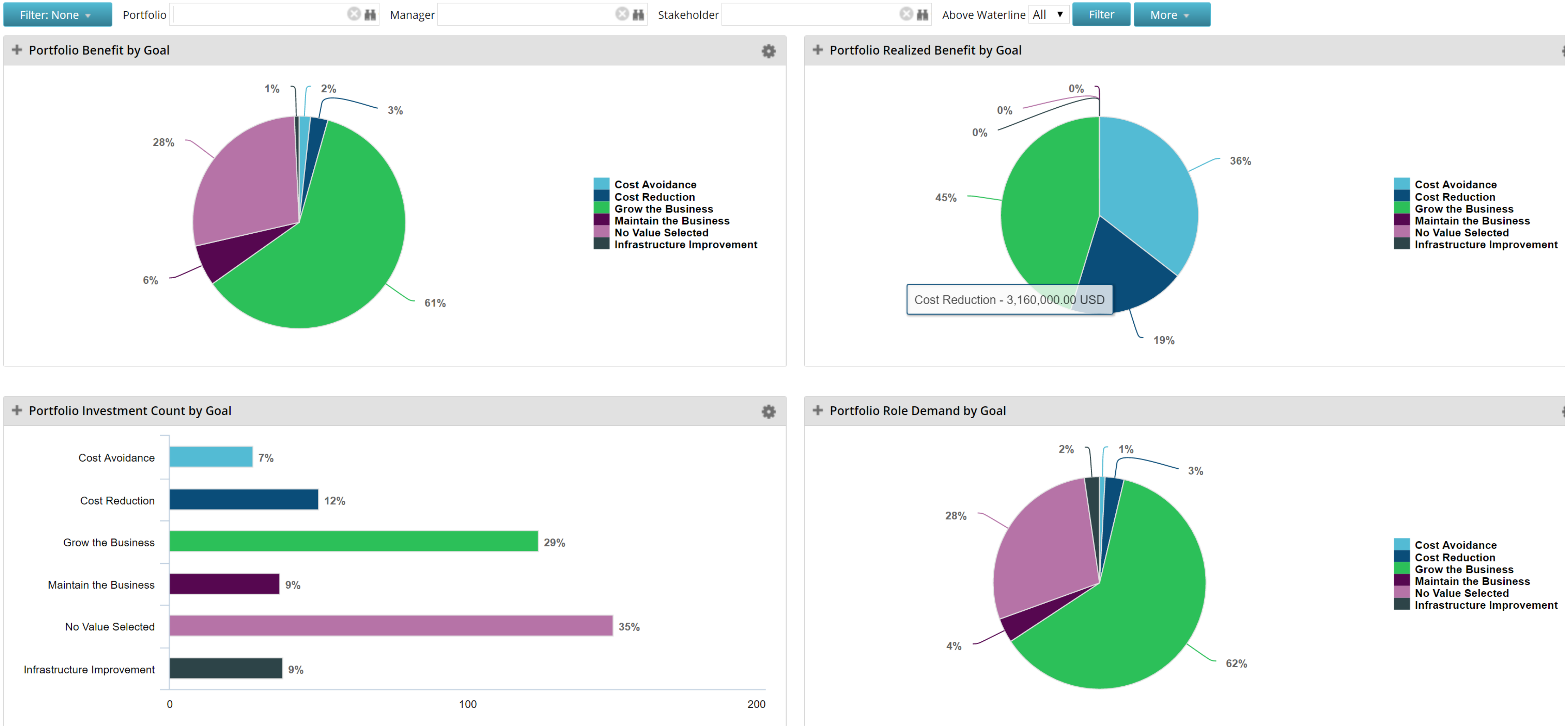


Process Bottlenecks [Filter: Issue Review and Escalation ▾]

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

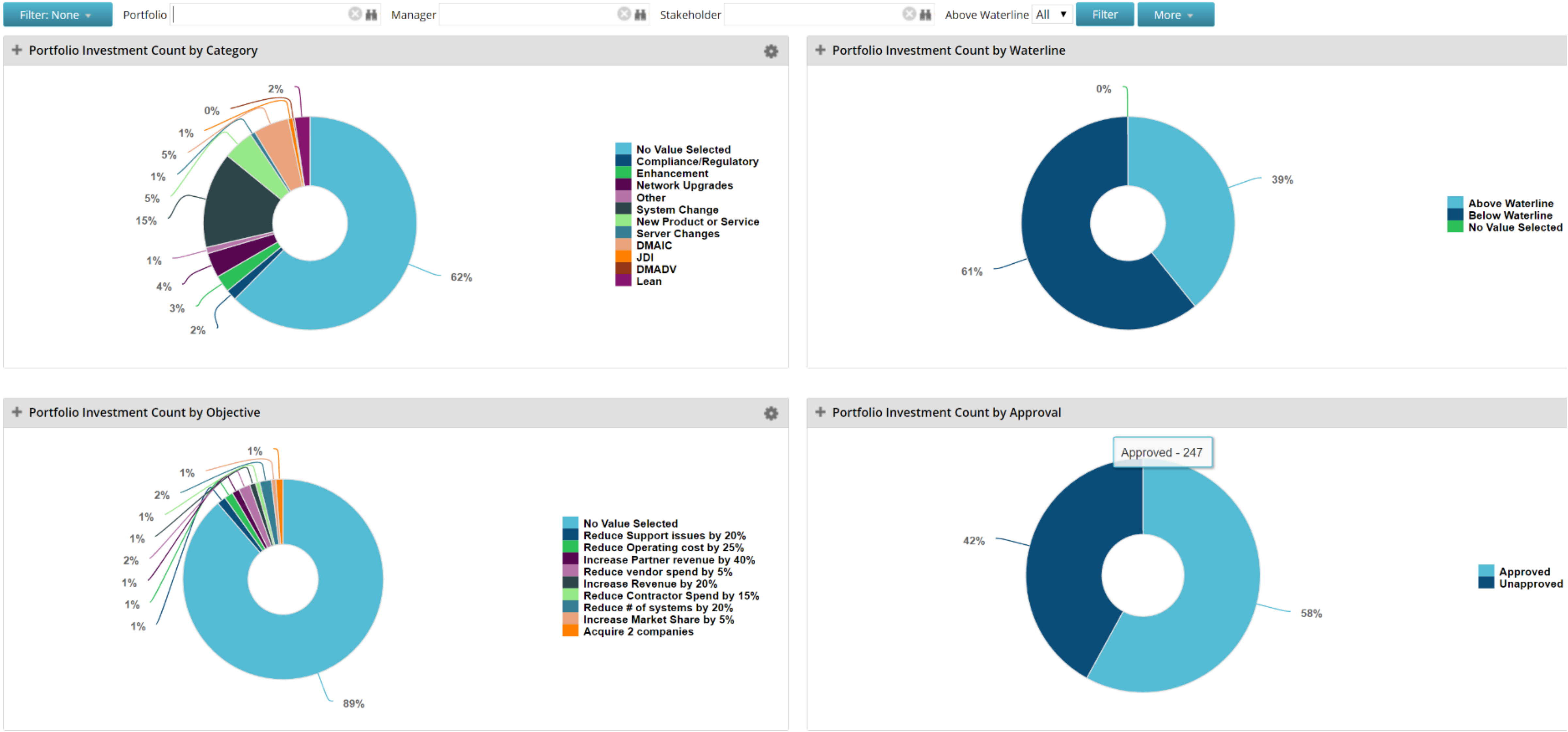
OOTB Metrics – Portfolio

Portlet


Filter: None
Portfolio
Manager
Stakeholder
Above Waterline
All
Filter
More
Portfolio Benefit by Goal
1%
2%
3%
28%
6%
61%
Cost Avoidance
Cost Reduction
Grow the Business
Maintain the Business
No Value Selected
Infrastructure Improvement
Portfolio Realized Benefit by Goal
0%
0%
0%
36%
45%
19%
Cost Reduction - 3,160,000.00 USD
Cost Avoidance
Cost Reduction
Grow the Business
Maintain the Business
No Value Selected
Infrastructure Improvement
Portfolio Investment Count by Goal
Cost Avoidance
7%
Cost Reduction
12%
Grow the Business
29%
Maintain the Business
9%
No Value Selected
35%
Infrastructure Improvement
9%
0
100
200
Portfolio Role Demand by Goal
2%
1%
3%
28%
4%
62%
Cost Avoidance
Cost Reduction
Grow the Business
Maintain the Business
No Value Selected
Infrastructure Improvement

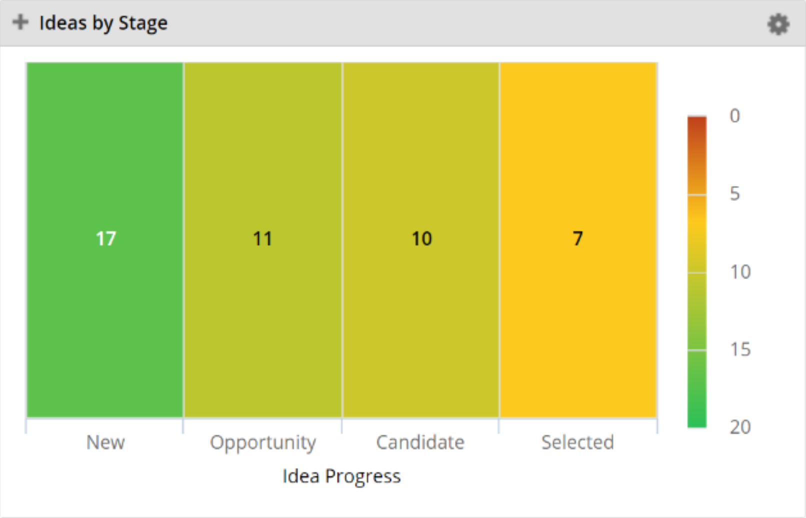
OOTB Metrics – Portfolio

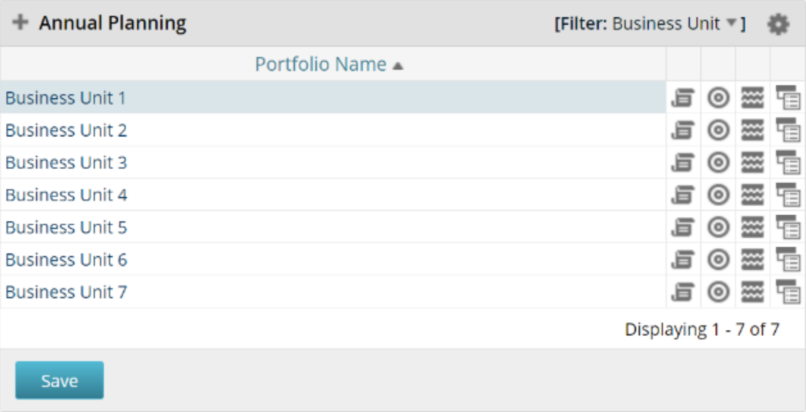
Portlet


Filter: None
Portfolio
Manager
Stakeholder
Above Waterline
All
Filter
More
Portfolio Investment Count by Category
2%
0%
1%
5%
1%
5%
15%
1%
4%
3%
2%
62%
No Value Selected
Compliance/Regulatory
Enhancement
Network Upgrades
Other
System Change
New Product or Service
Server Changes
DMAIC
JDI
DMADV
Lean
Portfolio Investment Count by Waterline
0%
39%
61%
Above Waterline
Below Waterline
No Value Selected
Portfolio Investment Count by Objective
1%
1%
2%
1%
1%
2%
1%
1%
1%
89%
No Value Selected
Reduce Support issues by 20%
Reduce Operating cost by 25%
Increase Partner revenue by 40%
Reduce vendor spend by 5%
Increase Revenue by 20%
Reduce Contractor Spend by 15%
Reduce # of systems by 20%
Increase Market Share by 5%
Acquire 2 companies
Portfolio Investment Count by Approval
Approved - 247
42%
58%
Approved
Unapproved

OOTB Metrics – Portfolio

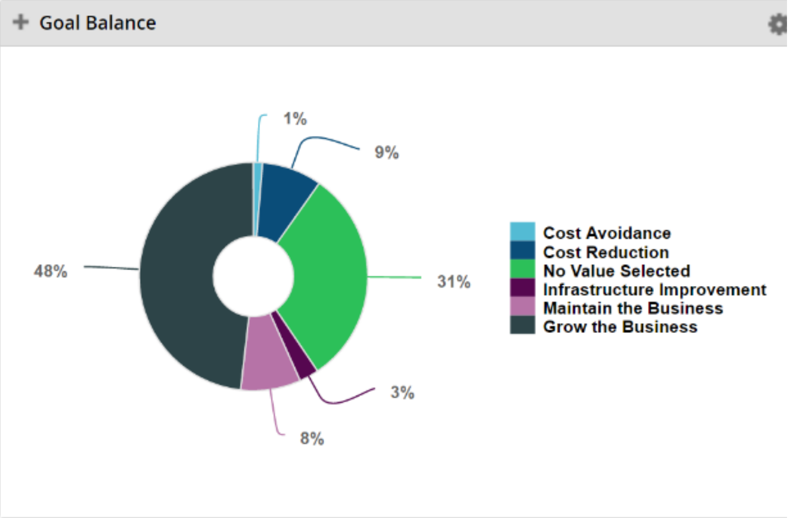
Portlet

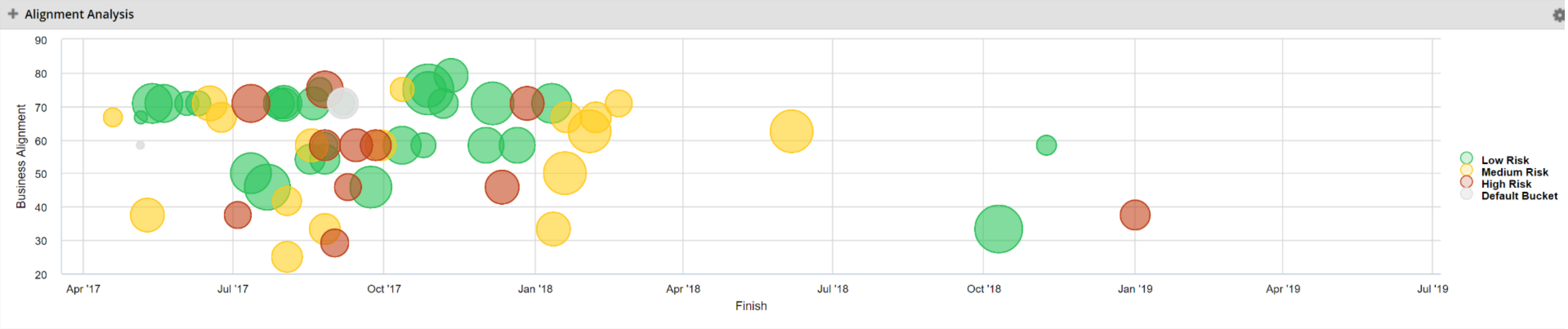



Annual Planning [Filter: Business Unit ▾]

Portfolio Name ▲
Business Unit 1
Business Unit 2
Business Unit 3
Business Unit 4
Business Unit 5
Business Unit 6
Business Unit 7

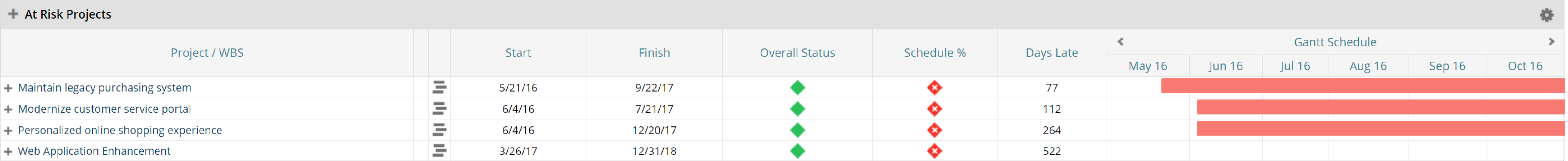
Displaying 1 - 7 of 7





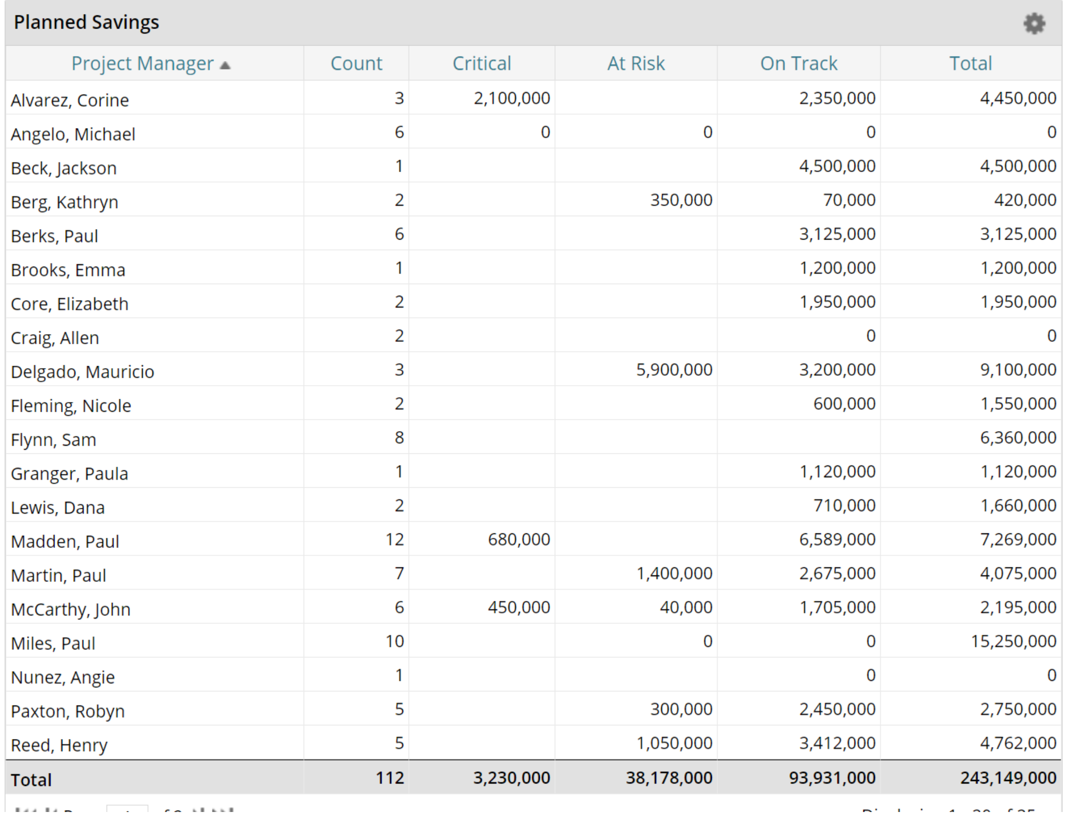
OOTB Metrics – Portfolio

Portlet



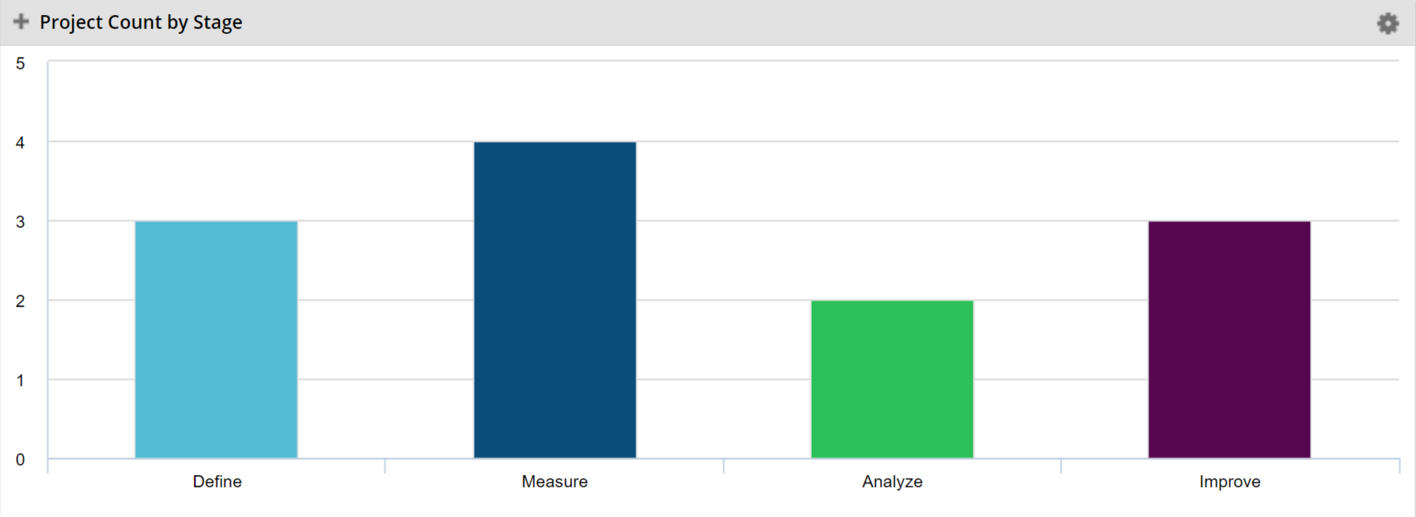
At Risk Projects

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



Planned Savings

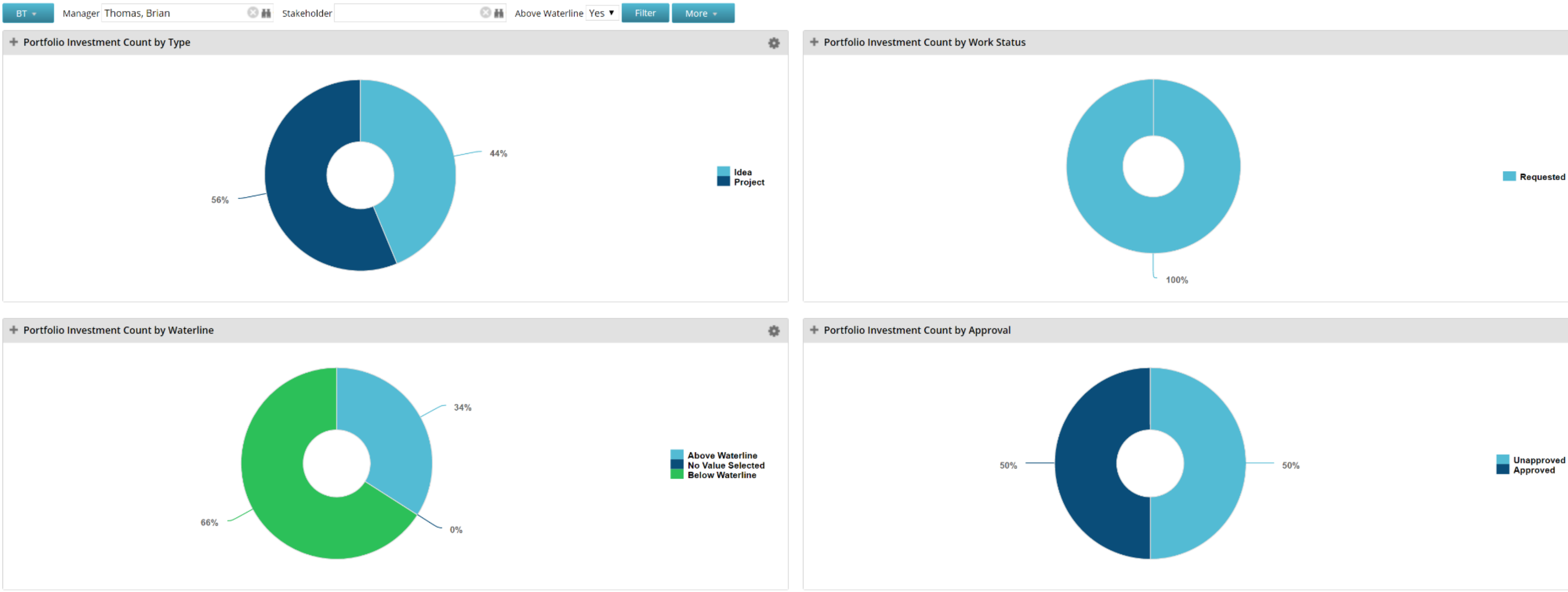
Project Manager ▲	Count	Critical	At Risk	On Track	Total
Alvarez, Corine	3	2,100,000		2,350,000	4,450,000
Angelo, Michael	6	0	0	0	0
Beck, Jackson	1			4,500,000	4,500,000
Berg, Kathryn	2		350,000	70,000	420,000
Berks, Paul	6			3,125,000	3,125,000
Brooks, Emma	1			1,200,000	1,200,000
Core, Elizabeth	2			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**



Project Count by Stage

OOTB Metrics – Portfolio

Portlet



Manager: Thomas, Brian

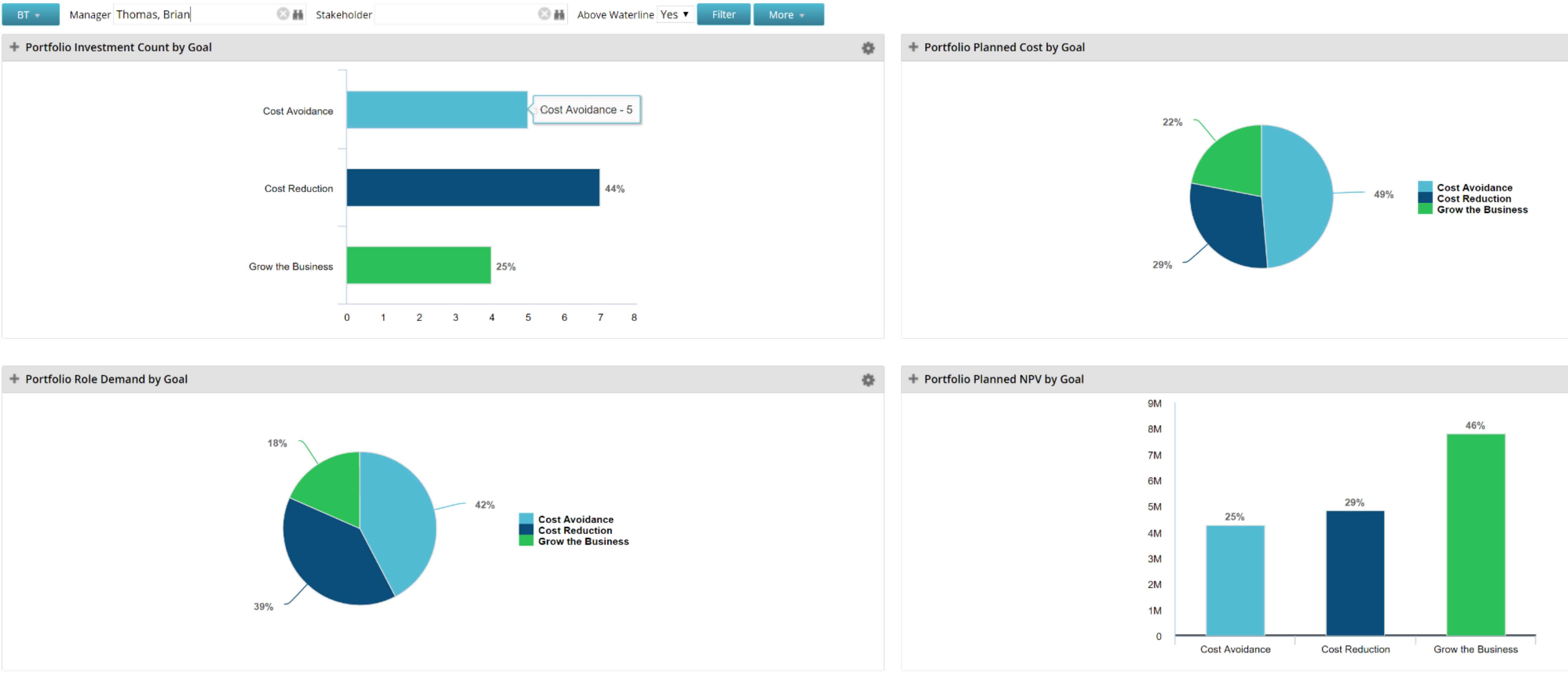
Stakeholder:

Above Waterline: Yes

BT
Filter
More
Portfolio Investment Count by Type
44%
56%
Idea
Project
Portfolio Investment Count by Work Status
100%
Requested
Portfolio Investment Count by Waterline
34%
66%
0%
Above Waterline
No Value Selected
Below Waterline
Portfolio Investment Count by Approval
50%
50%
Unapproved
Approved

OOTB Metrics – Portfolio

Portlet



Manager Thomas, Brian

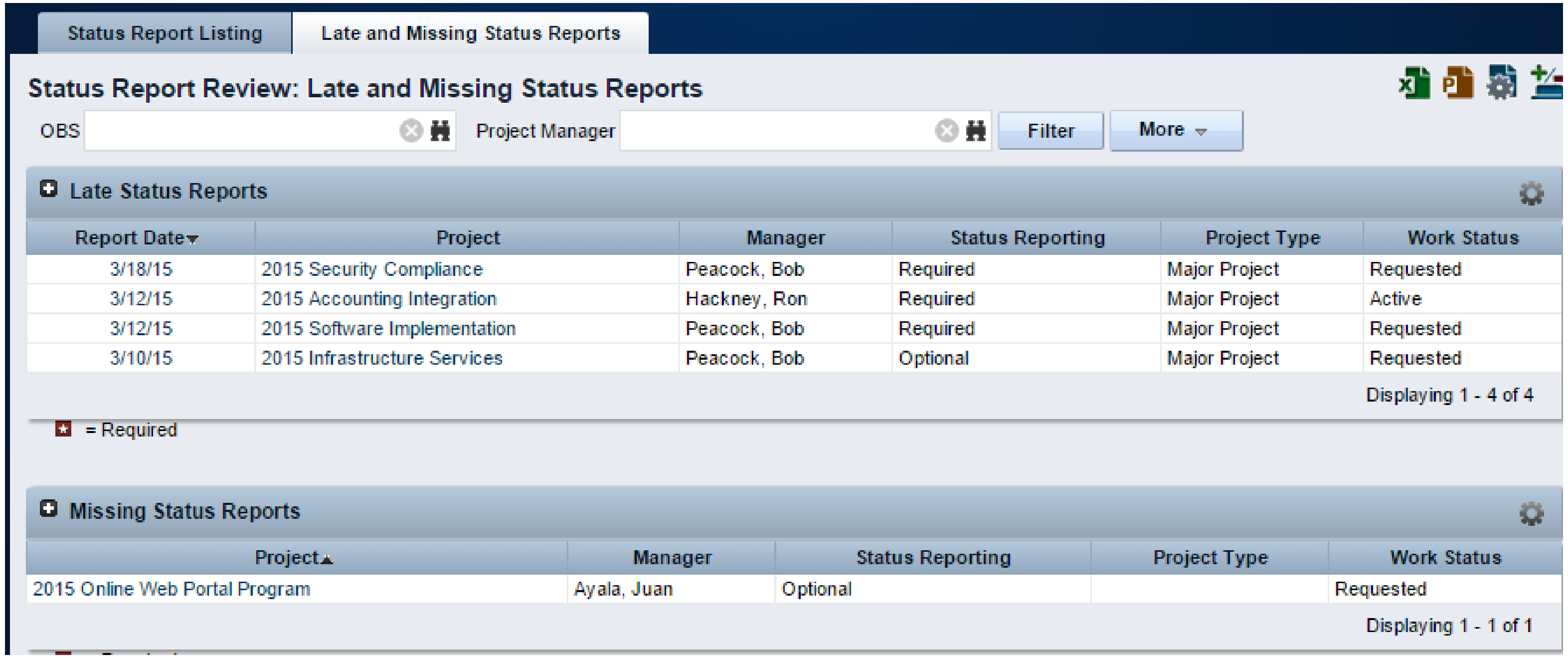
Stakeholder

Above Waterline Yes

BT
Filter
More
Portfolio Investment Count by Goal
Cost Avoidance
Cost Avoidance - 5
Cost Reduction
44%
Grow the Business
25%
0
1
2
3
4
5
6
7
8
Portfolio Planned Cost by Goal
22%
49%
29%
Cost Avoidance
Cost Reduction
Grow the Business
Portfolio Role Demand by Goal
18%
42%
39%
Cost Avoidance
Cost Reduction
Grow the Business
Portfolio Planned NPV by Goal
9M
8M
7M
6M
5M
4M
3M
2M
1M
0
25%
29%
46%
Cost Avoidance
Cost Reduction
Grow the Business

OOTB Metrics – Compliance

Portlet



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

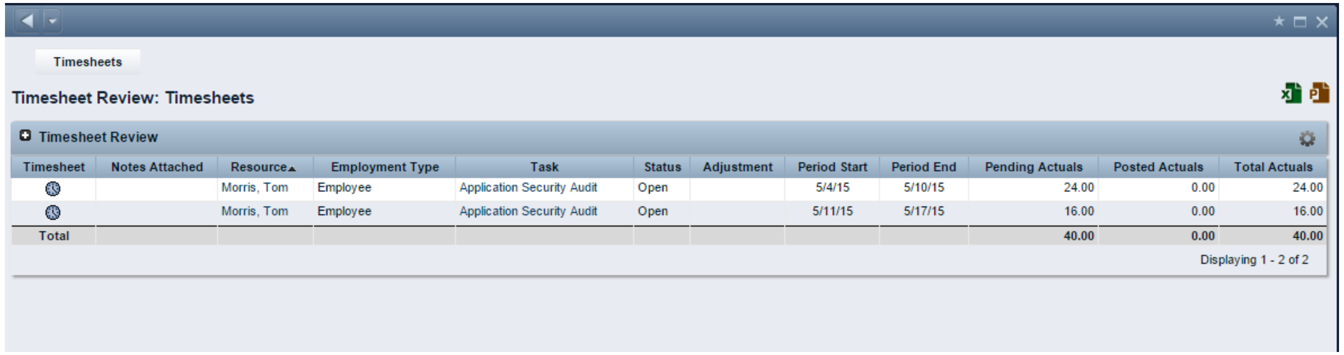
Displaying 1 - 4 of 4

■ = Required

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



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