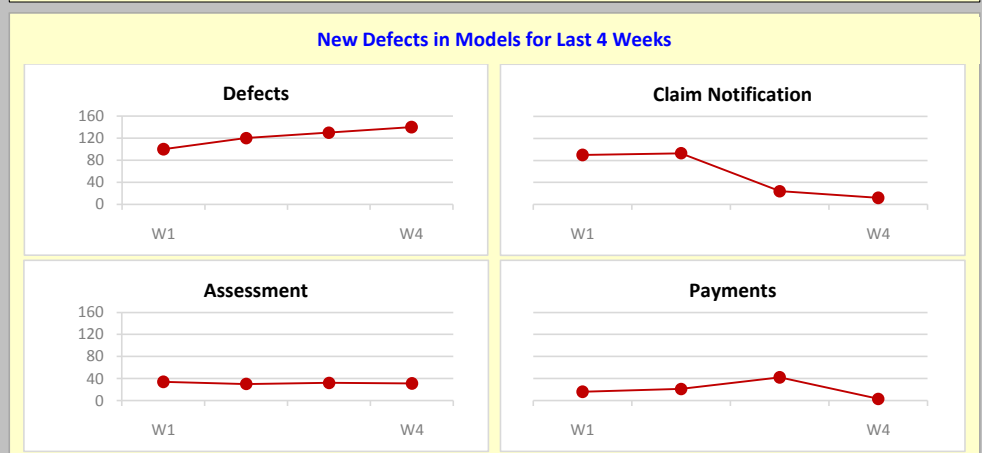
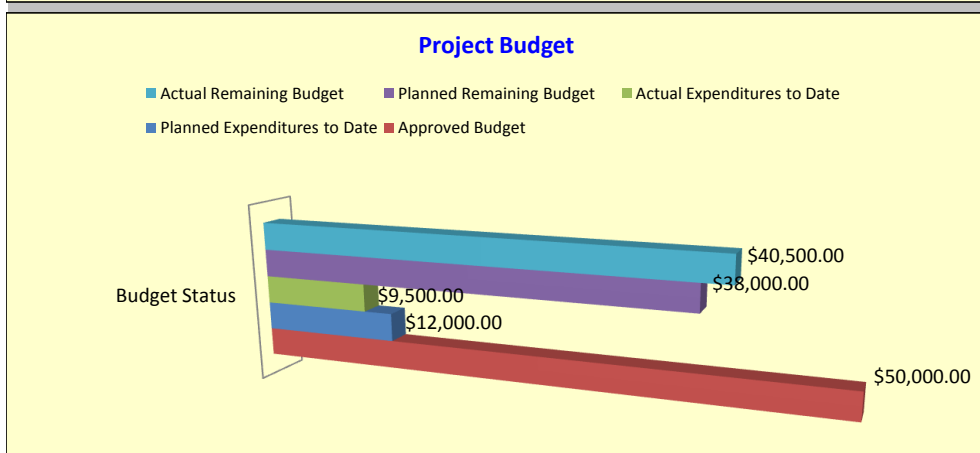
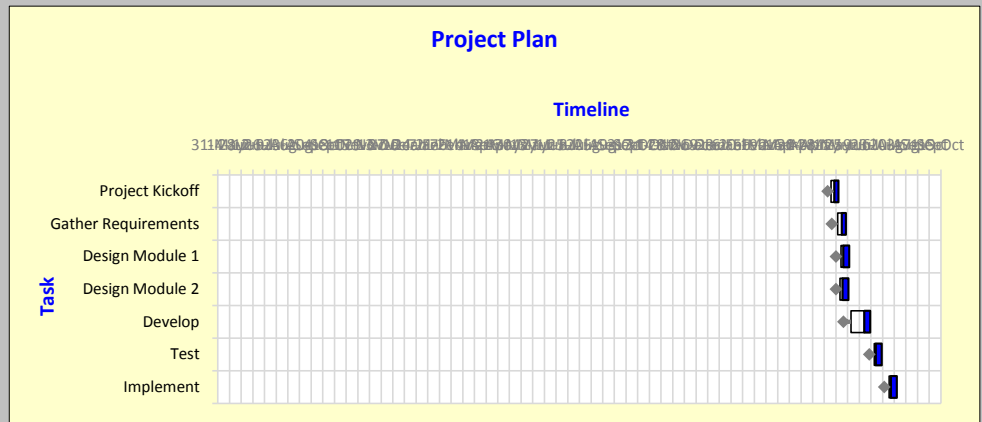
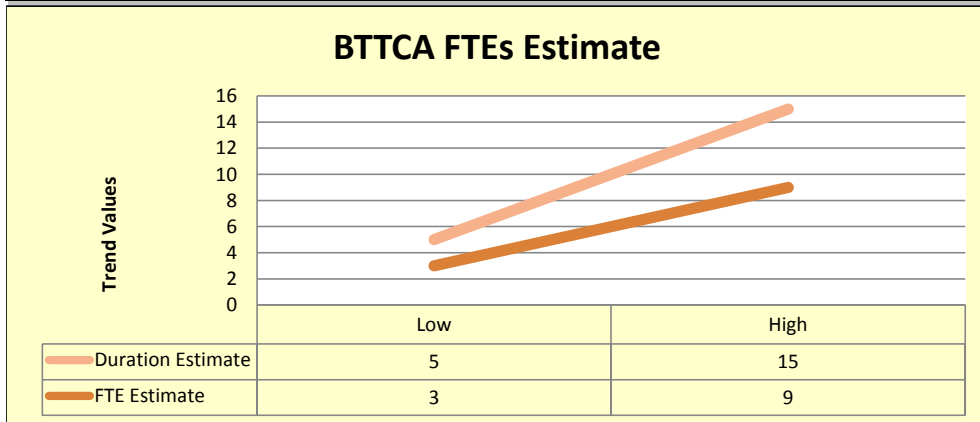
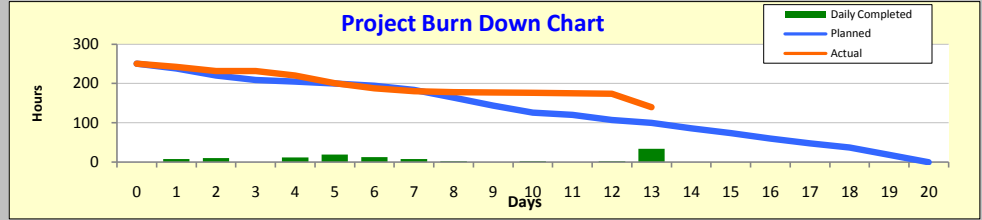


Dashboard

| | |
|---------------------------|------------------------------------|
| Project: | Project Title Here |
| Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here |
| Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here |
| Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 |



| Business Transition & Technology Complexity Assessment (BTCA) Model | | | |
|---|-------------------------------|--------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| Business Transition Complexity Criteria Table | | | | | | | | | |
|---|-----------------------|----|---|---|---|---|---|-------------------------|------------------|
| | | NA | 1 | 2 | 3 | 4 | 5 | | Comments/Details |
| Categories | Low Complexity | | | | | | | High Complexity | |
| Sponsor | One | | | | | | | None/Many | |
| Objectives | Clear | | | | | | | Vague | |
| Goals | Clearly Defined | | | | | | | Not Clearly Defined | |
| Business Processes | Clearly Defined | | | | | | | Not Clearly Defined | |
| Business Rules | Few - Known | | | | | | | Many - Unknown | |
| Business Location | One | | | | | | | Many | |
| Federal/State Mandate | Few Business Changes | | | | | | | Many Business Changes | |
| Other Key Drivers (Audit Findings, Sanctions, Lawsuits) | Simple | | | | | | | Complex | |
| Stakeholder Impact | Low | | | | | | | High | |
| Duration of Effort | 3 Months or less | | | | | | | More than 3 years | |
| Contract Need | None | | | | | | | Significant/Complex | |
| Conflicting Projects | None | | | | | | | Many | |
| Cross Departmental Involvement | None | | | | | | | Many | |
| Critical Business Processes Affected | One | | | | | | | Many | |
| Level of Training Effort Required | Informal | | | | | | | Formal/Classroom | |
| Number of Internal Users | 20 or Less | | | | | | | More than 2000 | |
| Number of External Users | 20 or Less | | | | | | | More than 2000 | |
| Delivery Schedule | Compressed | | | | | | | Flexible | |
| Funding Source | Non-Constrained | | | | | | | Grant /Time Constrained | |
| Human Resources Staffing Impact | Low | | | | | | | High | |

Business Complexity Trend: 0 0 0 0 0

Business Transition & Technology Complexity Assessment (BTCA) Model

| | | | |
|---------------------------|-------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Technical Complexity Criteria Table

| | | NA | 1 | 2 | 3 | 4 | 5 | | Comments/Details |
|---|-----------------------|----|---|---|---|---|------------------------|---------------------|------------------|
| Categories | Low Complexity | | | | | | High Complexity | | |
| Technology/Platform | DHS Standard | | | | | | | New Technology | |
| Development Locations | One | | | | | | | Many | |
| System Platform | One | | | | | | | Many | |
| Amount of Integration | Simple | | | | | | | Complex | |
| Number of Users | Less than 20 | | | | | | | Greater than 2000 | |
| System Availability | 8-5, M-F | | | | | | | 24-Hrs, 7 Days | |
| Internal Technical Resources | Experienced | | | | | | | Inexperienced | |
| External Maintenance Technical Experience | Experienced | | | | | | | Inexperienced | |
| Fed/State Mandate | Few Changes | | | | | | | Many Changes | |
| Conflicting Projects | None | | | | | | | Many | |
| Rough Estimate | Under \$75,000 | | | | | | | Over \$1,000,000 | |
| Contract Need | None | | | | | | | Significant/Complex | |
| Multiple IT Group Involvement | No Other | | | | | | | More than 5 Other | |
| Security/Roles | Low (Less than 3) | | | | | | | High (More than 6) | |
| Co-Location of Technical Team | Local | | | | | | | Outside Oregon | |
| Data Conversion | One system | | | | | | | Multiple Systems | |
| Hosting | Internal | | | | | | | External | |

Technical Complexity Trend: 0 0 0 0 0

Business Transition Criteria Table

| | | NA | 1 | 2 | 3 | 4 | 5 | | Comments/Details |
|--------------------------------------|-----------------------|----|---|---|---|---|------------------------|------------------------|------------------|
| Categories | Low Complexity | | | | | | High Complexity | | |
| Cross Departmental Involvement | One | | | | | | | Many | |
| Critical Business Processes Affected | One | | | | | | | Many | |
| Level of Training Effort Required | Informal | | | | | | | Formal/Classroom | |
| Business Processes | Defined/Familiar | | | | | | | Undefined/Unfamiliar | |
| Business Rules | Defined/Established | | | | | | | Undefined/Non-Existent | |
| Business Location | One | | | | | | | Many | |
| Number of Users Impacted | 50 or Less | | | | | | | More than 50 | |
| End User Impact | Low | | | | | | | High | |
| Duration of Effort | 3 Months or Less | | | | | | | More than 3 Months | |
| Technical Complexity Criteria | Low | | 1 | | | | | High | |

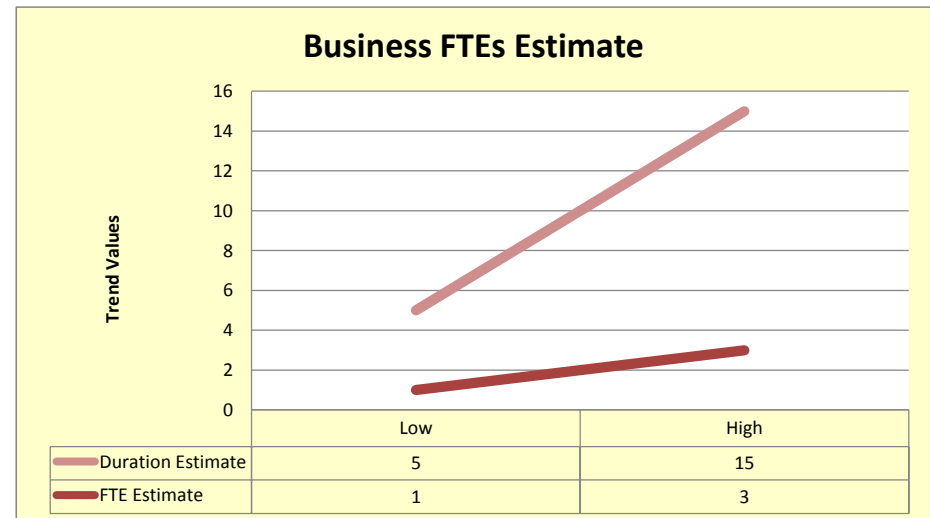
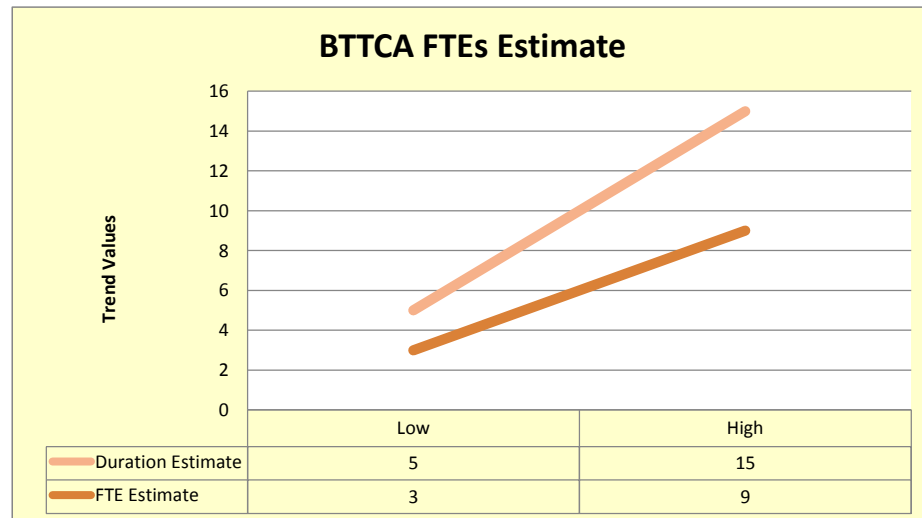
Business Complexity Trend: 1 0 0 0 0

| Business Transition & Technology Complexity Assessment (BTCA) Model | | | |
|---|-------------------------------|--------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

For Business Transition Criteria determinations assume that the Technical Complexity Level will always be scored as a 1.

Rough Order of Magnitude (ROM)

| | BTTCA | Business Transition Trend | Combined Totals |
|-----------------------------|-----------|---------------------------|-----------------|
| Combined Trend Here: | ## 3,3 | ## 1,1 | |
| Cost Estimate | \$\$\$ | \$\$\$ | \$\$\$ |
| Low | \$234,476 | \$7,535 | \$242,011 |
| High | \$703,427 | \$22,605 | \$726,032 |
| Duration Estimate | mths. | mths. | mths. |
| Low | 5 | 1 | 5 |
| High | 15 | 3 | 15 |
| FTE Estimate | # of FTE | # of FTE | # of FTE |
| Low | 3 | 1 | 3 |
| High | 9 | 3 | 9 |



Complexity Assessment

| Business Transition & Technology Complexity Assessment (BTCA) Model | | | |
|---|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Business Complexity

Instructions: On a scale of .5 - low to 4-high (0 = N/A), rate each applicable attribute and compute the Business Complexity by dividing the total by the number of items rated above zero. [Notes: Business and technical complexity will be computed automatically in this worksheet, using the ratings you enter. Move your pointer over each attribute cell, marked with a red triangle, to see a definition of the attribute.]

| Low Complexity | Business Attribute | High Complexity | Rating |
|------------------------|--|------------------------|--------|
| 0 | 1 | 2 | 3 |
| Static | Business rules | Changing | |
| Static | Current Business Systems | Changing | |
| Known and Followed | Decision Making Process | Not Known | |
| Low | Financial Risk to Organization | High | |
| Local | Geography | Company Wide | |
| Clear and Stable | High Level Requirements | Vague | |
| Few & Routine | Interaction with Other Departments and Entities | Many and New | |
| None | Impact to Business Process | High | |
| Few & Straight Forward | Issues | Multiple & Contentious | |
| High | Level of Authority | Low | |
| Clear | Objectives | Vague | |
| Established | Policies | Non-existent | |
| Minimal | Politics | High | |
| Familiar | Target Users | Unfamiliar | |
| Experienced | Project Manager's Experience | Inexperienced | |
| Experienced | Team | Inexperienced | |
| Loose | Time Scale | Tight | |
| Low | Visibility | High | |
| | | | |
| | | | |
| | | | |
| | | Total: | 0 |
| | | Complexity: | 0.0 |

Complexity Assessment

| Business Transition & Technology Complexity Assessment (BTCA) Model | | | |
|---|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Technical Complexity

Instructions: On a scale of 0-low to 4-high, rate each applicable attribute and compute the Technical Complexity by dividing the total by the number of items rated above zero. Use the definitions in the student notebook for clarity.

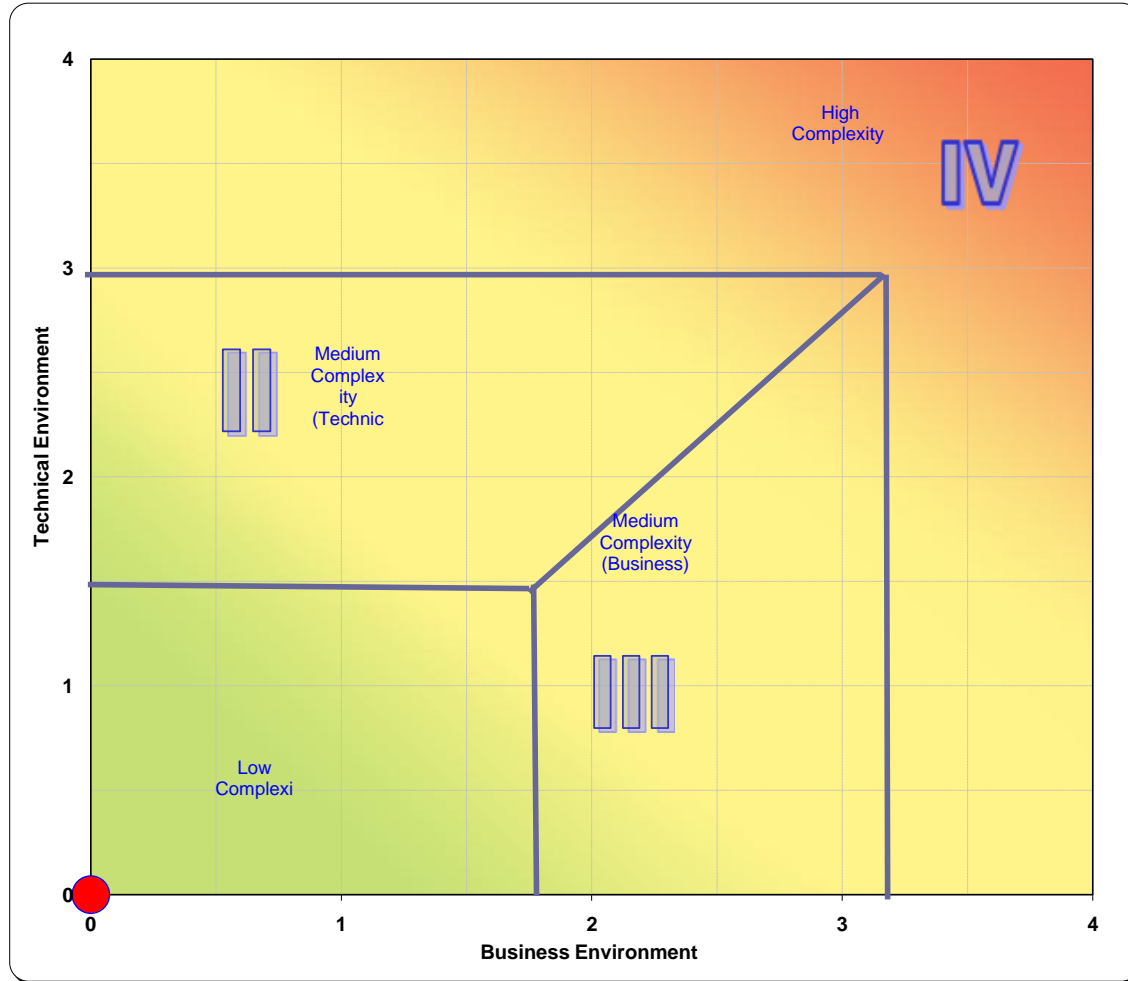
| Low Complexity | Technical Attribute | High Complexity | Rating |
|------------------------|------------------------------------|--------------------|--------|
| 0 | 1 | 2 | 3 |
| Local | Communications | Company wide | |
| Established | Delivery Mechanism | New | |
| Local | Geography | Company wide | |
| Proven | Hardware | New | |
| Stand-alone | Level Of Integration | Tightly Integrated | |
| Proven/Stable | Networks (L/W) | New | |
| In place | New Technology Architecture | Not in place | |
| 9-5, Mon-Fri | Operations | 24-hour, 7-day | |
| Expert | PM Technical Experience | Novice | |
| Established and in use | Scope Management Process | None | |
| Light | Security | Tight | |
| Proven | Software | New | |
| Established and In Use | Standards And Methods | None | |
| Experienced | Team | Inexperienced | |
| High | Tolerance To Fault | Low | |
| Low | Transaction Volume | High | |
| | | | |
| | | | |
| | | | |
| Total: | | | 0 |
| Complexity: | | | 0.0 |

Complexity Assessment

| Business Transition & Technology Complexity Assessment (BTCA) Model | | | |
|---|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Complexity Diagram

Instructions: Plot your project in the appropriate complexity zone.
 [Note: Your project will be plotted automatically in this worksheet, using the values computed in the previous tables.]



Scores

| | |
|-----------------------------|-----|
| Business Complexity | 0.0 |
| Technical Complexity | 0.0 |

Complexity Assessment

| Business Transition & Technology Complexity Assessment (BTCA) Model | | | |
|---|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Suggested Project Manager Skill Set Guidelines

| Complexity | | Duration | | Budget | | Resources | |
|----------------------------------|-------------------------------------|----------------------------------|---------------------|----------------------------------|----------------|----------------------------------|---------|
| <input checked="" type="radio"/> | Zone 1 | <input checked="" type="radio"/> | < 6 months | <input checked="" type="radio"/> | <\$500K | <input checked="" type="radio"/> | < 5 |
| <input type="radio"/> | Zone II, Medium Zone III, Medium | <input type="radio"/> | < 1 year | <input type="radio"/> | <\$1M | <input type="radio"/> | <10 |
| <input type="radio"/> | Zone II, High Zone III, High | <input type="radio"/> | >1 year; < 3 years | <input type="radio"/> | >\$1M; <\$5M | <input type="radio"/> | 11 – 20 |
| <input type="radio"/> | Zone IV | <input type="radio"/> | >3 years; <10 years | <input type="radio"/> | >\$5M; <\$100M | <input type="radio"/> | 21 – 40 |
| | | <input type="radio"/> | >10 years | <input type="radio"/> | >\$100M | <input type="radio"/> | 40+ |

PM Level: Novice Experience: Minimum 1 year working as a key team member on an IT project. Technical experience commensurate with the proposed technology.

Professional Knowledge: Understands the PMO and department's methodology.

| |
|--|
| For Oversight Purposes: |
| Zone I = Low Criticality/Risk |
| Zones II and III = Medium Criticality/Risk |
| Zone IV = High Criticality/Risk |

Assess the complexity of the project periodically: every two - three months and/or at the conclusion of each phase

Project Minicharter

| | | | |
|--|--------------------------------------|---------------------|-------------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |
| Background | | | |
| Business need and business benefits | | | |
| Objectives | | | |
| Scope | In Scope | Out of Scope | |
| | | | |
| | | | |
| Deliverables | Deliverable | Due Date | |
| | | | |
| | | | |
| Flexibility matrix | Scope | | |
| | Schedule | | |
| | Cost | | |
| Key considerations | Assumptions & Constraints | Risks | |
| | | Category | Risk Description |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Project Minicharter

| | | | |
|-------------------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |
| Success criteria | 1 - | | |
| | 2 - | | |
| | 3 - | | |
| | 4 - | | |
| | 5 - | | |
| Signatures Sponsor | | | |
| | Signature | | |
| | Printed name | | |
| | Date | | |
| | | | |
| Project Manager | | | |
| | Signature | | |
| | Printed name | | |
| | Date | | |

Stoplight Report

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| Deliverables | | | | | | | | | | |
|--------------------|---|---|---|---|---|---|---|---|---|----|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Schedule | | | | | | | | | | |
| Scope | | | | | | | | | | |
| Cost | | | | | | | | | | |
| Risk | | | | | | | | | | |
| Issues | | | | | | | | | | |
| Planned completion | | | | | | | | | | |
| Est. Completion | | | | | | | | | | |

Management Alert

| ID | Situation Requiring Management Attention | Action Plan | Owner |
|----|--|-------------|-------|
| | | | |
| | | | |
| | | | |

Accomplishments During Reporting Period

| ID | Description of Accomplishment | Planned Completion | Date Completed | Owner | Comments |
|----|-------------------------------|--------------------|----------------|-------|----------|
| | | | | | |
| | | | | | |
| | | | | | |

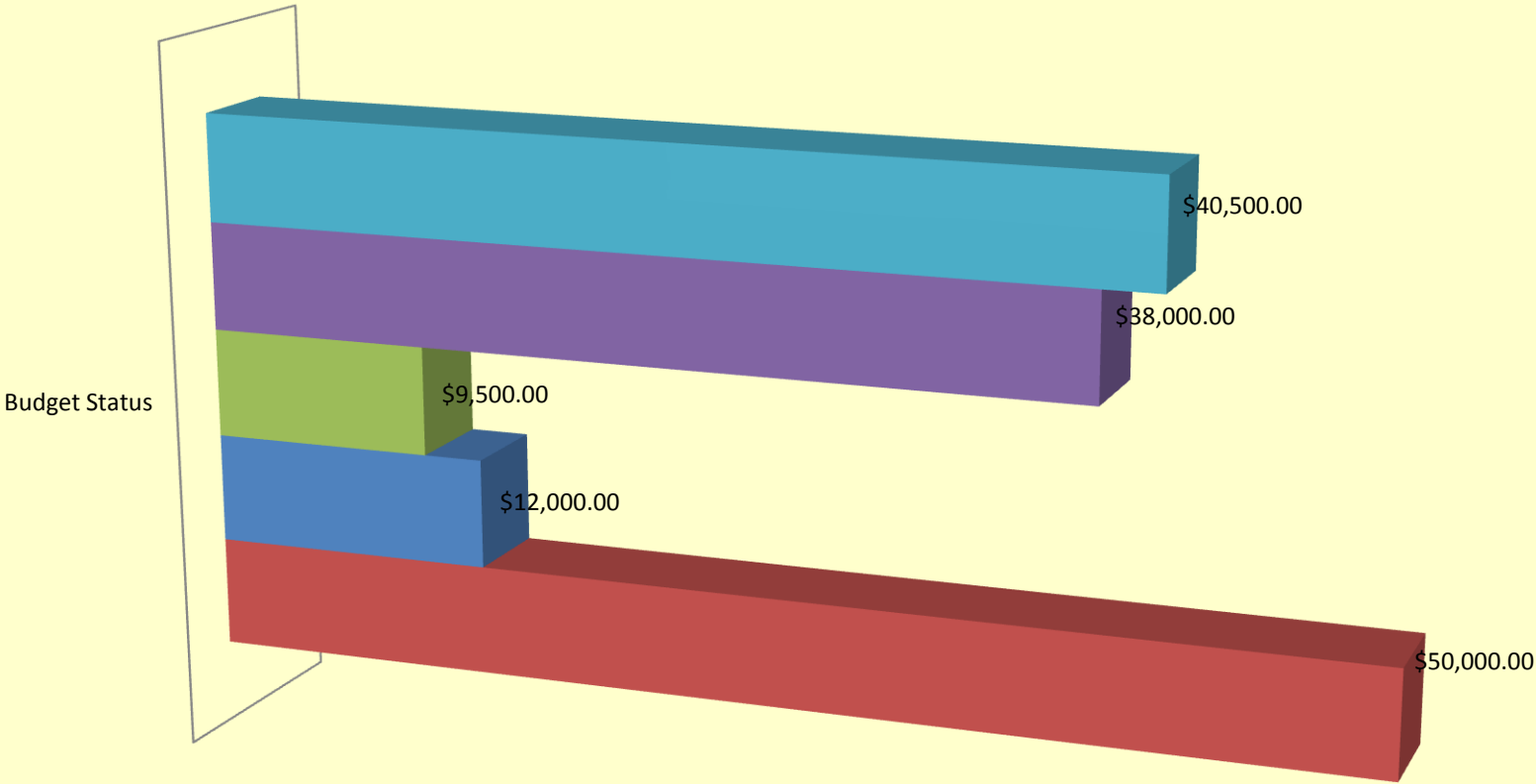
| Deliverables | Title/Description | | Title/Description |
|--------------|-------------------|----|-------------------|
| 1 | | 6 | |
| 2 | | 7 | |
| 3 | | 8 | |
| 4 | | 9 | |
| 5 | | 10 | |

| Budget | | | |
|--------------------------------|-------------------------------------|------------------------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |
| Budget Status | | | |
| Approved Budget | Planned Expenditures to Date | Actual Expenditures to Date | Variance |
| \$50,000.00 | \$12,000.00 | \$9,500.00 | \$2,500.00 |
| | Planned Remaining Budget | Actual Remaining Budget | Variance |
| | \$38,000.00 | \$40,500.00 | -\$2,500.00 |
| Additional \$ needed | | | |
| Budget Details | | | |
| Internal Expenses | | | |
| Salaries | Hourly Rate | # Hours | Total Cost |
| Type of resource | \$0.00 | 0.00 | \$0.00 |
| Type of resource | \$0.00 | 0.00 | \$0.00 |
| Type of resource | \$0.00 | 0.00 | \$0.00 |
| Type of resource | \$0.00 | 0.00 | \$0.00 |
| Type of resource | \$0.00 | 0.00 | \$0.00 |
| Type of resource | \$0.00 | 0.00 | \$0.00 |
| Other Internal Expenses | | | Total Cost |
| Type of expense | | | \$0.00 |
| Type of expense | | | \$0.00 |
| Type of expense | | | \$0.00 |
| Total Internal Expenses | | | \$0.00 |
| External Expenses | | | |
| Consulting Costs | | | Total Cost |
| Type of consulting | | | \$0.00 |
| Type of consulting | | | \$0.00 |
| Type of consulting | | | \$0.00 |
| Capital Expenditures | | | Total Cost |
| Type of expense | | | \$0.00 |
| Type of expense | | | \$0.00 |
| Type of expense | | | \$0.00 |
| Total External Expenses | | | \$0.00 |
| Total Budget | | | \$0.00 |

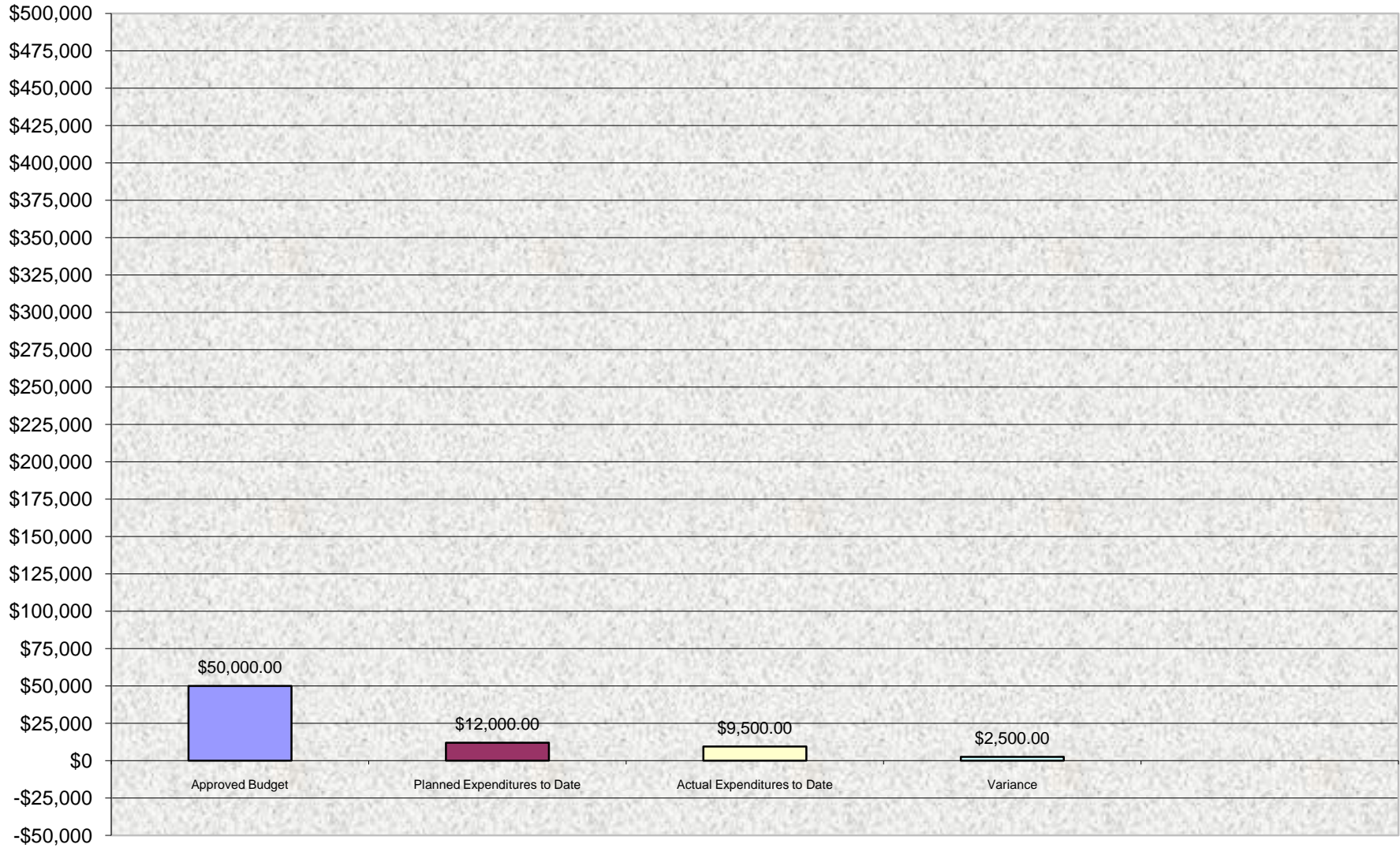
Budget

Project Budget

Actual Remaining Budget Planned Remaining Budget Actual Expenditures to Date Planned Expenditures to Date Approved Budget



Project Name Here



| Cost/Benefit Analysis | | | | | | |
|---|------------------------------------|--------|-----------|--------------|---------------------------------|--------|
| Project: | Project Title Here | | | Project #: | Project Number Here | |
| Project Manager: | Project Manager Name Here | | | Sponsor: | Sponsor Name Here | |
| Project Artifacts: | Location of Project Documents Here | | | Last Update: | Date of Last Update | |
| Accounting Code: | PLCF0011 | | | | | |
| Project Development and Maintenance Costs | | | | | | |
| Description | FY2010 | FY2011 | FY2012 | FY2013 | FY2014 | Total |
| Cost of Project Development | | | | | | |
| Salaries | | | | | | |
| Other internal expenses | | | | | | |
| Consulting costs | | | | | | |
| Capital expenditures | | | | | | |
| Total Project Costs | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Cost of Support | | | | | | |
| Operational Costs | | | | | | |
| Nonrecurring Costs | | | | | | |
| Recurring Costs | | | | | | |
| Total ongoing Support Costs | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Benefits/Savings | | | | | | |
| Current Process | FY2010 | FY2011 | FY2012 | FY2013 | FY2014 | Total |
| Total Annual Price | | | | | | |
| New Process | | | | | | |
| Total Annual Price | | | | | | |
| Annual savings | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Cumulative savings | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Cumulative costs | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Cumulative Total Net Savings | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Future Value | | | | | | |
| Present Value | Interest Rate | | # Periods | | Future Value | |
| | | | | | \$0.00 | |
| | | | | | | |
| Present Value | | | | | | |
| Future Value | Interest Rate | | # Periods | | Present Value | |
| \$0.00 | | | | | \$0.00 | |
| | | | | | | |
| Net Present Value | | | | | | |
| Period | Cash Flow | | | | Present Value | |
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
| Totals | \$0.00 | | | | \$0.00 | |
| | | | | | Project Development Cost | |
| | | | | | \$0.00 | |
| | | | | | Net Present Value (NPV) | |
| | | | | | \$0.00 | |

Risk Management Matrix (Risk Register)

| Project: | | Project Title Here | | | | | Project #: | | Project Number Here | | | | |
|---------------------------|--------------------|------------------------------------|--------|---------------|------------|----------|---|--|--|-------------------------|--------|--------------|----------------|
| Project Manager: | | Project Manager Name Here | | | | | Sponsor: | | Sponsor Name Here | | | | |
| Project Artifacts: | | Location of Project Documents Here | | | | | Last Update: | | Date of Last Update | | | | |
| Accounting Code: | | PLCF0011 | | | | | | | | | | | |
| ID | Risk Description | Probability | Impact | Detectability | Importance | Category | Trigger Event/Indicator | Risk Response and Description | Contingency Plan | Owner | Status | Date Entered | Date to Review |
| 1 | What is this risk? | | | | 0 | | What act or event initiates either the risk occurrence or precipitates the response strategy? | How will you respond to this risk and what actions will you take to match that response? | If the risk becomes a reality, what will you do in response, as a backup, or alternative/workaround? | Who monitors this risk? | | | |
| 2 | | | | | 0 | | | | | | | | |
| 3 | | | | | 0 | | | | | | | | |
| 4 | | | | | 0 | | | | | | | | |
| 5 | | | | | 0 | | | | | | | | |
| 6 | | | | | 0 | | | | | | | | |
| 7 | | | | | 0 | | | | | | | | |
| 8 | | | | | 0 | | | | | | | | |
| 9 | | | | | 0 | | | | | | | | |
| 10 | | | | | 0 | | | | | | | | |
| 11 | | | | | 0 | | | | | | | | |
| 12 | | | | | 0 | | | | | | | | |
| 13 | | | | | 0 | | | | | | | | |
| 14 | | | | | 0 | | | | | | | | |
| 15 | | | | | 0 | | | | | | | | |

Issues Log

| Project: | | Project Title Here | | Project #: | Project Number Here | | | |
|---------------------------|--------------------|--|--|-------------------------|---------------------|--------------|----------------|---------------|
| Project Manager: | | Project Manager Name Here | | Sponsor: | Sponsor Name Here | | | |
| Project Artifacts: | | Location of Project Documents Here | | Last Update: | Date of Last Update | | | |
| Accounting Code: | | PLCF0011 | | | | | | |
| ID | Issue Description | Project Impact | Action Plan/Resolution | Owner | Importance | Date Entered | Date to Review | Date Resolved |
| 1 | What is the issue? | How will this impact scope, schedule & cost? | How do you intend to deal with this issue? | Who manages this issue? | | | | |
| 2 | | | | | | | | |
| 3 | | | | | | | | |
| 4 | | | | | | | | |
| 5 | | | | | | | | |
| 6 | | | | | | | | |
| 7 | | | | | | | | |
| 8 | | | | | | | | |
| 9 | | | | | | | | |
| 10 | | | | | | | | |
| 11 | | | | | | | | |
| 12 | | | | | | | | |
| 13 | | | | | | | | |

| Issues Log | | | | | | | | |
|--------------------|-------------------|------------------------------------|------------------------|-------|--------------|--------------|---------------------|---------------|
| Project: | | Project Title Here | | | Project #: | | Project Number Here | |
| Project Manager: | | Project Manager Name Here | | | Sponsor: | | Sponsor Name Here | |
| Project Artifacts: | | Location of Project Documents Here | | | Last Update: | | Date of Last Update | |
| Accounting Code: | | PLCF0011 | | | | | | |
| ID | Issue Description | Project Impact | Action Plan/Resolution | Owner | Importance | Date Entered | Date to Review | Date Resolved |
| 14 | | | | | | | | |
| 15 | | | | | | | | |
| 16 | | | | | | | | |
| 17 | | | | | | | | |
| 18 | | | | | | | | |
| 19 | | | | | | | | |
| 20 | | | | | | | | |
| 21 | | | | | | | | |
| 22 | | | | | | | | |
| 23 | | | | | | | | |
| 24 | | | | | | | | |
| 25 | | | | | | | | |
| 26 | | | | | | | | |

| Issues Log | | | | | | | | |
|---------------------------|-------------------|------------------------------------|------------------------|-------|---------------------|--------------|---------------------|---------------|
| Project: | | Project Title Here | | | Project #: | | Project Number Here | |
| Project Manager: | | Project Manager Name Here | | | Sponsor: | | Sponsor Name Here | |
| Project Artifacts: | | Location of Project Documents Here | | | Last Update: | | Date of Last Update | |
| Accounting Code: | | PLCF0011 | | | | | | |
| ID | Issue Description | Project Impact | Action Plan/Resolution | Owner | Importance | Date Entered | Date to Review | Date Resolved |
| 27 | | | | | | | | |
| 28 | | | | | | | | |
| 29 | | | | | | | | |
| 30 | | | | | | | | |
| 31 | | | | | | | | |

Action Items

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |

Accounting Code: PLCF0011

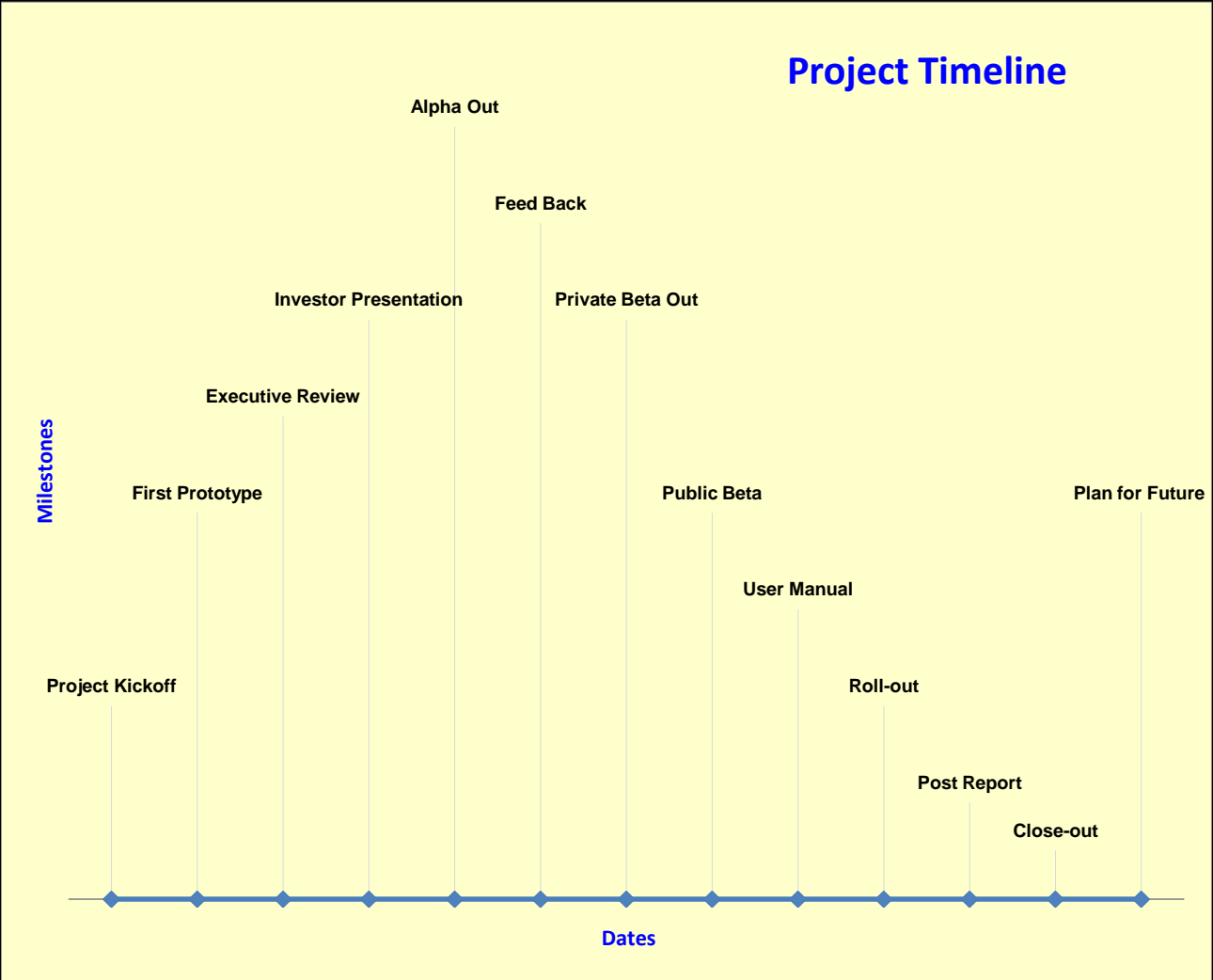
| ID | Action Item | Owner | Status | Date Entered | Planned Completion | Actual Completion | Comments |
|----|-----------------------------------|------------------|--------|--------------|--------------------|-------------------|----------|
| 1 | What is the item to be completed? | Who manages this | | | | | |
| 2 | | | | | | | |
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| 15 | | | | | | | |

Action Items

| Project: | | Project Title Here | | | Project #: | Project Number Here | |
|---------------------------|-------------|------------------------------------|--------|--------------|---------------------|---------------------|----------|
| Project Manager: | | Project Manager Name Here | | | Sponsor: | Sponsor Name Here | |
| Project Artifacts: | | Location of Project Documents Here | | | Last Update: | Date of Last Update | |
| Accounting Code: | | PLCF0011 | | | | | |
| ID | Action Item | Owner | Status | Date Entered | Planned Completion | Actual Completion | Comments |
| 16 | | | | | | | |
| 17 | | | | | | | |
| 18 | | | | | | | |
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| 21 | | | | | | | |
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| 29 | | | | | | | |
| 30 | | | | | | | |

| Deliverable Milestones | | | | | | | | |
|---------------------------|-----------|------------------------------------|--------------------|-------------------|---------------------|-------------|---------------------|--|
| Project: | | Project Title Here | | | Project #: | | Project Number Here | |
| Project Manager: | | Project Manager Name Here | | | Sponsor: | | Sponsor Name Here | |
| Project Artifacts: | | Location of Project Documents Here | | | Last Update: | | Date of Last Update | |
| Accounting Code: | | PLCF0011 | | | | | | |
| ID | Milestone | Description | Planned Completion | Actual Completion | Objectives | Assumptions | Constraints | |
| 1 | | | | | | | | |
| 2 | | | | | | | | |
| 3 | | | | | | | | |
| 4 | | | | | | | | |
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| 14 | | | | | | | | |
| 15 | | | | | | | | |
| 16 | | | | | | | | |

| Project Milestones | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

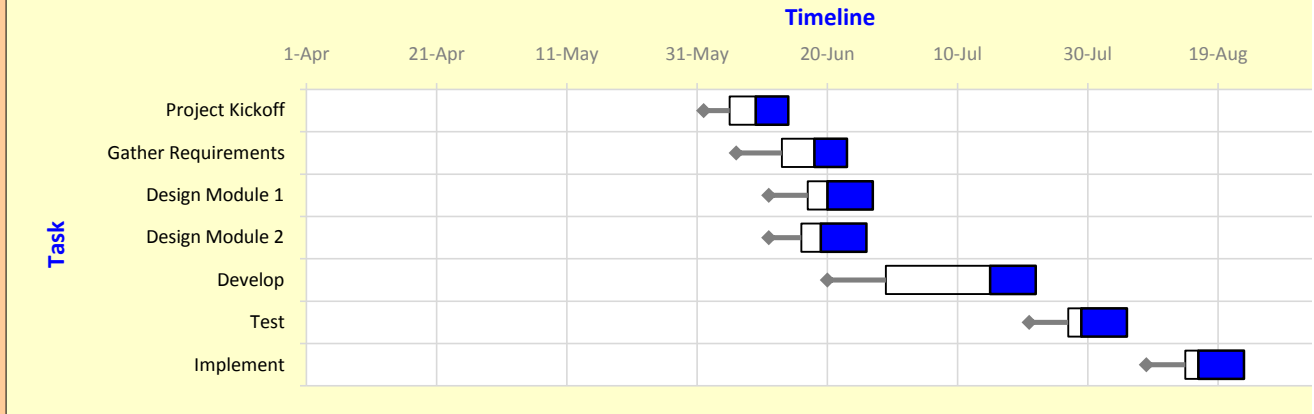


| Date | Milestone if any | Height | Dummy | Milestone |
|--------|-----------------------|--------|-------|-----------------------|
| May-09 | Project Kickoff | 1 | 0 | Project Kickoff |
| Jun-09 | First Prototype | 2 | 0 | First Prototype |
| Jul-09 | Executive Review | 2.5 | 0 | Executive Review |
| Aug-09 | Investor Presentation | 3 | 0 | Investor Presentation |
| Sep-09 | Alpha Out | 4 | 0 | Alpha Out |
| Oct-09 | Feed Back | 3.5 | 0 | Feed Back |
| Nov-09 | Private Beta Out | 3 | 0 | Private Beta Out |
| Dec-09 | Public Beta | 2 | 0 | Public Beta |
| Jan-10 | User Manual | 1.5 | 0 | User Manual |
| Feb-10 | Roll-out | 1 | 0 | Roll-out |
| Mar-10 | Post Report | 0.5 | 0 | Post Report |
| Apr-10 | Close-out | 0.25 | 0 | Close-out |
| May-10 | Plan for Future | 2 | 0 | Plan for Future |

Gantt Box Project Schedule

| | | | |
|---------------------------|------------------------------------|---------------------|----------------|
| Project: | Project Title Here | Project #: | Project Number |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last U |
| Accounting Code: | PLCF0011 | | |

Project Plan

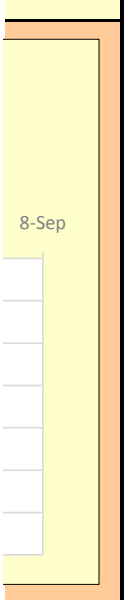


| Task | Start | Best Case | Realistic | Worst Case | Start2 | Realistic3 |
|---------------------|-----------|-----------|-----------|------------|--------|------------|
| Project Kickoff | 1-Jun-12 | 5-Jun-12 | 9-Jun-12 | 14-Jun-12 | 4 | 4 |
| Gather Requirements | 6-Jun-12 | 13-Jun-12 | 18-Jun-12 | 23-Jun-12 | 7 | 5 |
| Design Module 1 | 11-Jun-12 | 17-Jun-12 | 20-Jun-12 | 27-Jun-12 | 6 | 3 |
| Design Module 2 | 11-Jun-12 | 16-Jun-12 | 19-Jun-12 | 26-Jun-12 | 5 | 3 |
| Develop | 20-Jun-12 | 29-Jun-12 | 15-Jul-12 | 22-Jul-12 | 9 | 16 |
| Test | 21-Jul-12 | 27-Jul-12 | 29-Jul-12 | 5-Aug-12 | 6 | 2 |
| Implement | 8-Aug-12 | 14-Aug-12 | 16-Aug-12 | 23-Aug-12 | 6 | 2 |

er Here

e Here

Update



Worst

- 5
- 5
- 7
- 7
- 7
- 7
- 7

Critical Path Method

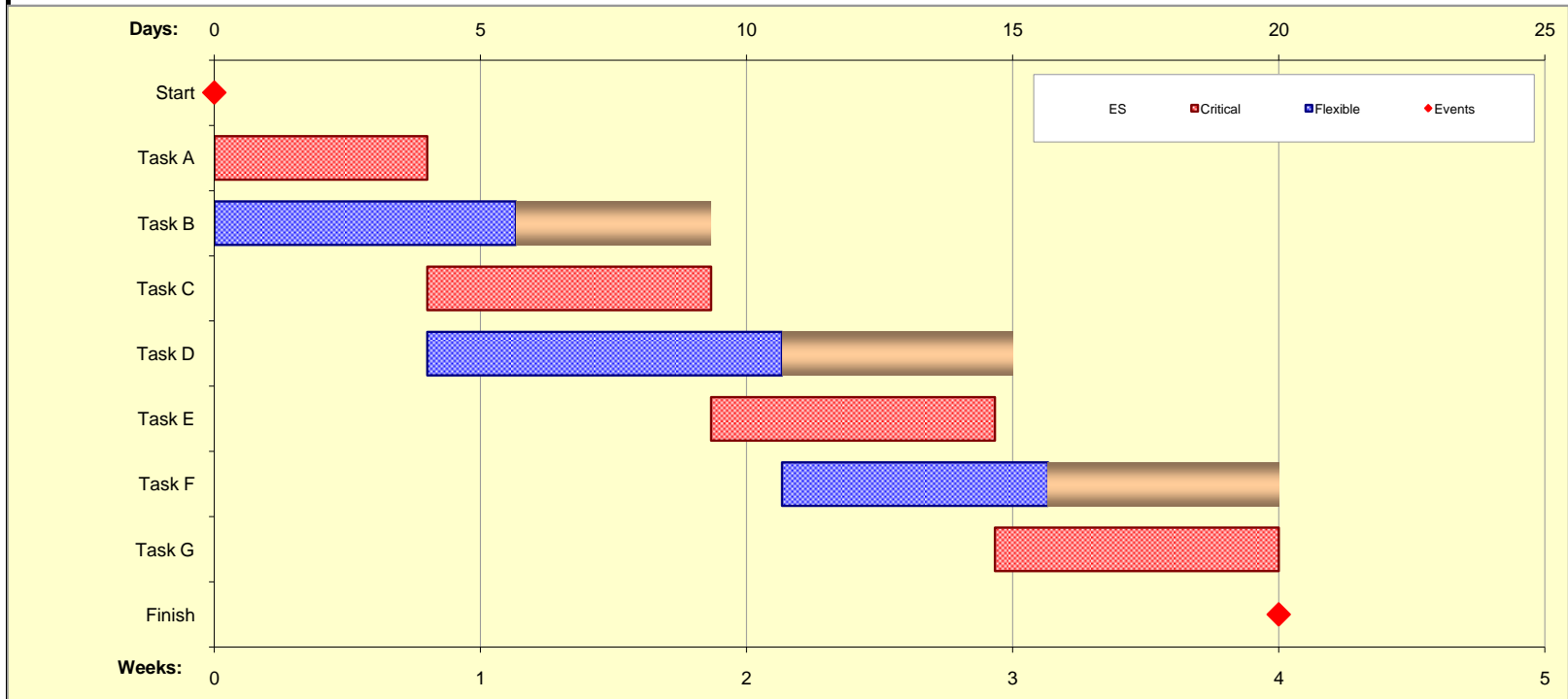
| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| | |
|--------------------|------------------|
| Start Date | Duration |
| 1/11/2010 | 20.0 Days |
| Finish Date | 4.0 Weeks |
| 1/31/2010 | 4.0 Weeks |

Times (in Days)

Time Distribution: Triangular

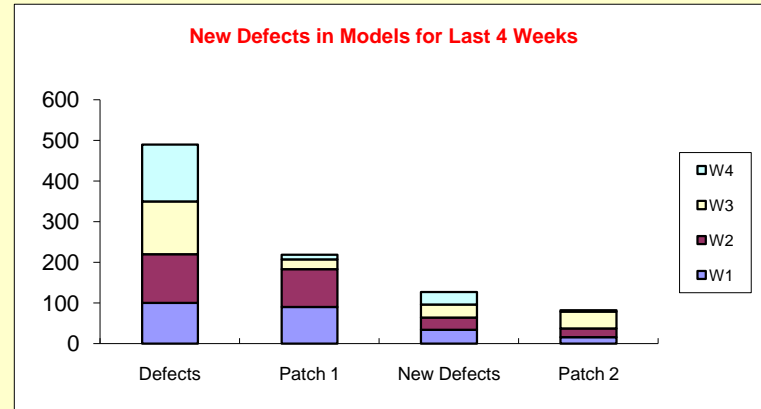
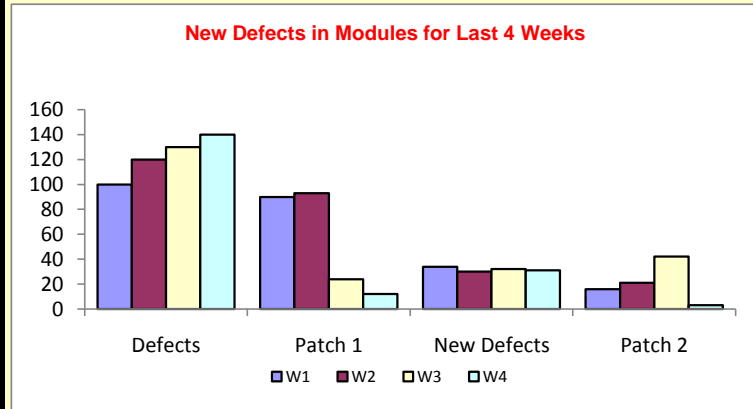
| ID | Task Name | Predecessors <small>(Enter one ID per cell)</small> | | | | O <small>(min)</small> | M <small>(most likely)</small> | P <small>(max)</small> | Duration <small>(exp. time)</small> | ES | EF | LS | LF | Slack |
|----|---------------|--|----|--|--|---------------------------|-----------------------------------|---------------------------|--|------|------|------|------|-------|
| | | | | | | | | | | | | | | |
| 10 | Start | | | | | | | | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| 20 | Task A | 10 | | | | 2 | 4 | 6 | 4.0 | 0.0 | 4.0 | 0.0 | 4.0 | 0.0 |
| 30 | Task B | 10 | | | | 3 | 5 | 9 | 5.7 | 0.0 | 5.7 | 3.7 | 9.3 | 3.7 |
| 40 | Task C | 20 | | | | 4 | 5 | 7 | 5.3 | 4.0 | 9.3 | 4.0 | 9.3 | 0.0 |
| 50 | Task D | 20 | | | | 4 | 6 | 10 | 6.7 | 4.0 | 10.7 | 8.3 | 15.0 | 4.3 |
| 60 | Task E | 30 | 40 | | | 4 | 5 | 7 | 5.3 | 9.3 | 14.7 | 9.3 | 14.7 | 0.0 |
| 70 | Task F | 50 | | | | 3 | 4 | 8 | 5.0 | 10.7 | 15.7 | 15.0 | 20.0 | 4.3 |
| 80 | Task G | 60 | | | | 3 | 5 | 8 | 5.3 | 14.7 | 20.0 | 14.7 | 20.0 | 0.0 |
| 90 | Finish | 70 | 80 | | | | | | 0.0 | 20.0 | 20.0 | 20.0 | 20.0 | 0.0 |



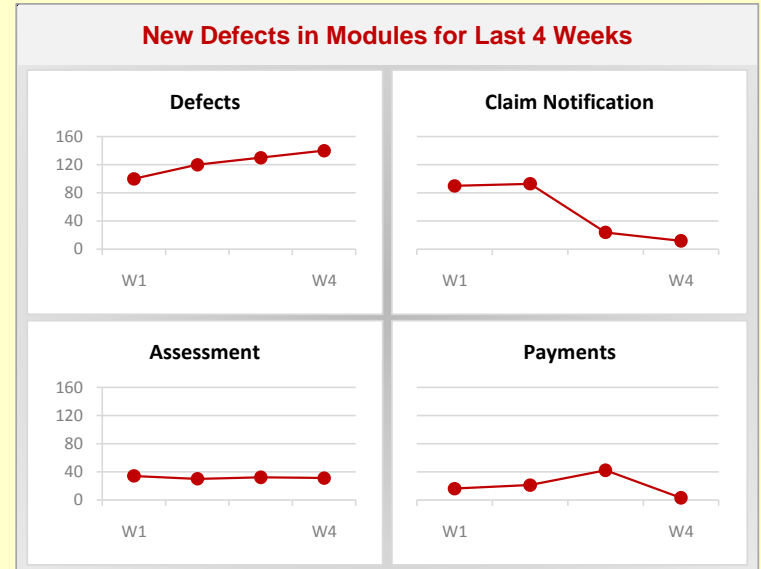
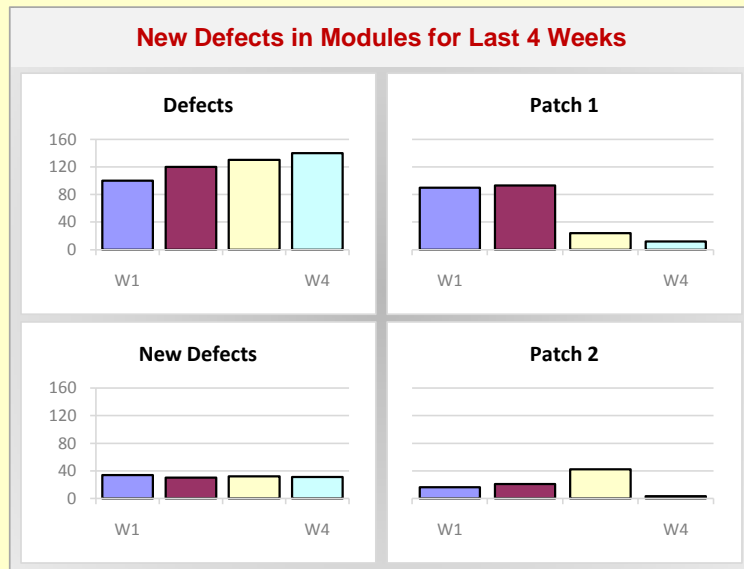
Data Defect Panel Charts

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Regular Charts



Panel Charts



DATA TABLE

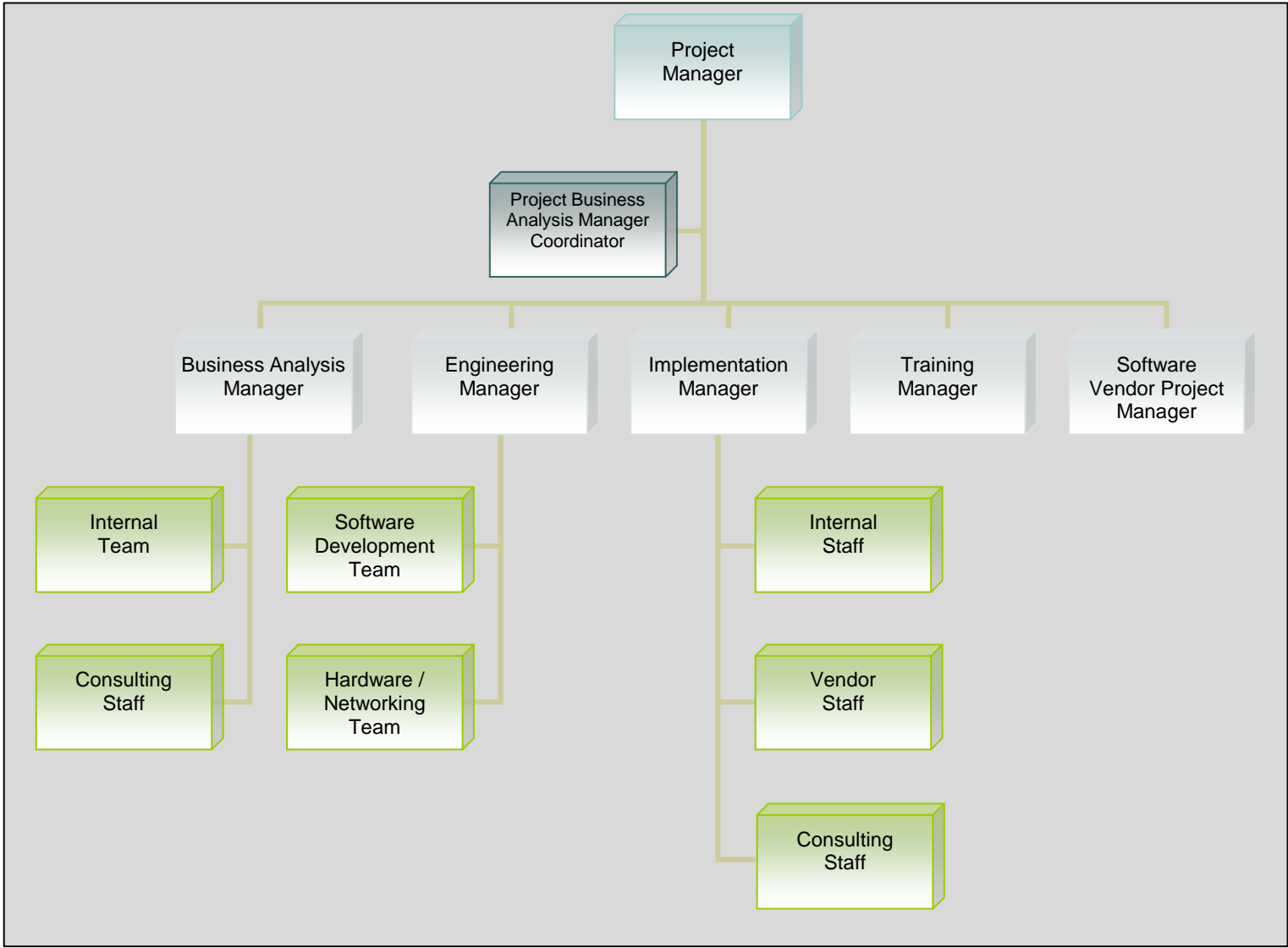
New Defects in Modules for Last 4 Weeks

| Week | Week | Defects | Patch 1 | New Defects | Patch 2 |
|------|------|---------|---------|-------------|---------|
| W1 | W1 | 100 | 90 | 34 | 16 |
| | W2 | 120 | 93 | 30 | 21 |
| | W3 | 130 | 24 | 32 | 42 |
| W4 | W4 | 140 | 12 | 31 | 3 |

Comments

Type in comments here regarding the chart analysis.

| Project/Governance Organizational Chart | | | |
|---|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |



Work Breakdown Structure

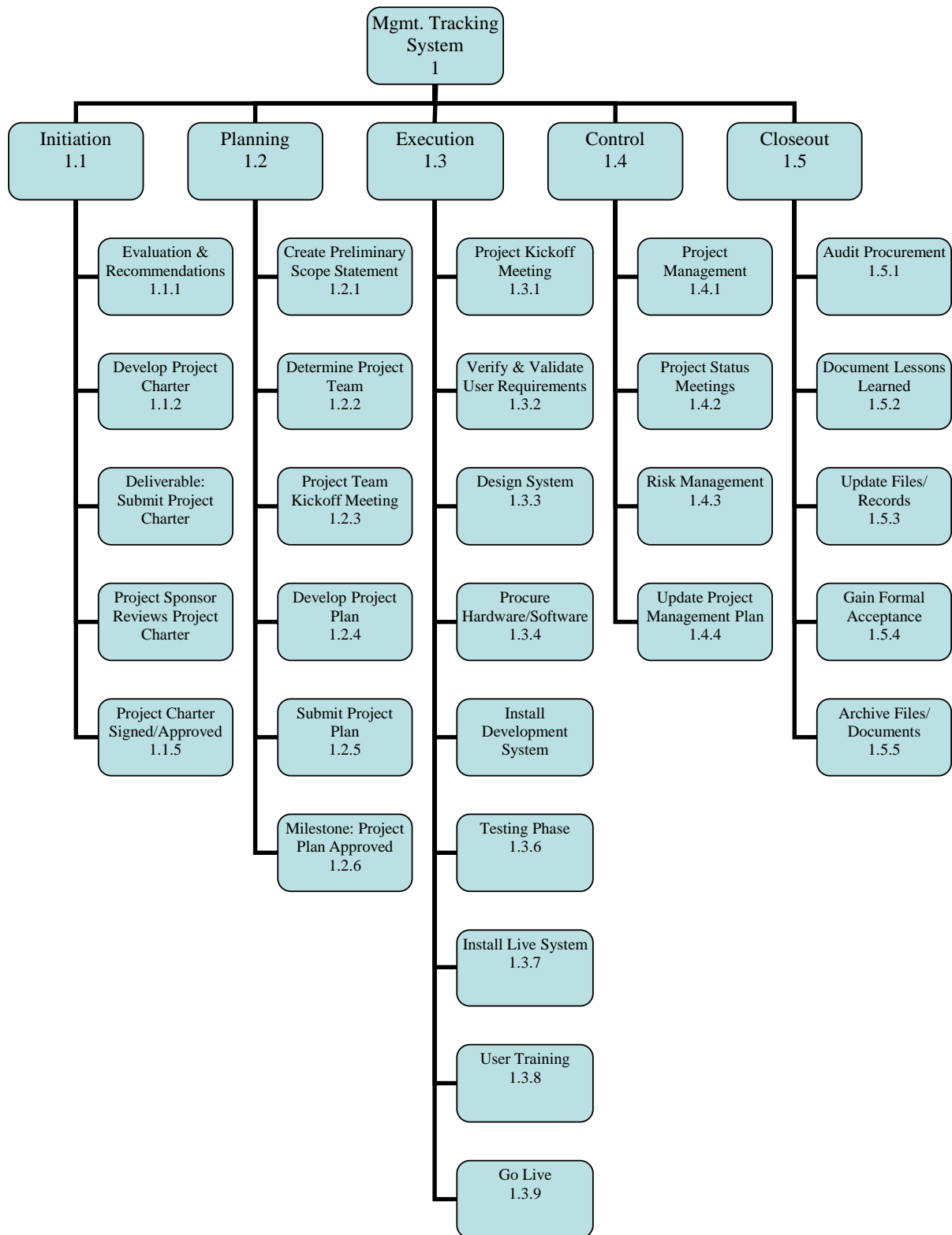
| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| ID | Task | Dependencies | Status | Effort Hours | Cost | Start Date | Planned Completion | Estimate to Completion | Actual Completion | Resource |
|----|------|--------------|--------|--------------|------|------------|--------------------|------------------------|-------------------|----------|
| 1 | | ID # of task | | | | | | | | |
| 2 | | | | | | | | | | |
| 3 | | | | | | | | | | |
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| 14 | | | | | | | | | | |
| 15 | | | | | | | | | | |
| 16 | | | | | | | | | | |

Note: Suggest using Microsoft Project, Visio and other WBS software to replace this form.

Work Breakdown Structure Chart

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |



Roster

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| Name | Core/ Extended Team | Title | Dept. | Phone | Cell Phone | E-Mail | Project Role |
|-------------|------------------------------------|--------------|--------------|--------------|-------------------|---------------|---------------------|
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Roster

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|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |

Accounting Code: PLCF0011

| Name | Core/ Extended Team | Title | Dept. | Phone | Cell Phone | E-Mail | Project Role |
|-------------|------------------------------------|--------------|--------------|--------------|-------------------|---------------|---------------------|
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RASCI Chart

(Responsible, Accountable, Supportive, Consulted, Informed)

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Functional Roles

| Activity | Project Sponsor | Business Project Owner | IT Project Owner | IT Business Partner | Business SME | Business Project Manager | IT Project Manager |
|--------------------------------|-----------------|------------------------|------------------|---------------------|--------------|--------------------------|--------------------|
| Project Proposal Document | A | S | C | R | C | I | I |
| Project Kick Off Meeting | I | I | S | C | I | I | R |
| Business Requirements Document | I | A | C | R | C | S | I |
| Functional Spec Document | I | A | R | S | C | S | I |
| Vendor Recommendation | I | A | R | C | C | I | I |
| Project Charter | I | C | A | C | I | C | R |
| Financial Review & Approval | A | S | R | S | I | I | S |
| Baseline Project Schedule | I | A | S | I | S | S | R |

RASCI Definitions:

- R** - Responsible. Owns the work, process, issues or resource to complete the activity
- A** - Accountable. Approves costs, scope and in some cases the timeline. It is assumed that the Approver has financial authority or prior financial approval.
- S** - Supportive. Provides resources or can play a supporting role in implementation.
- C** - Consulted. Has information and/or capability needed to complete the work.
- I** - Informed. Must be notified on results, but do not need to be involved in the decision-making process.

Stakeholder Definitions:

- Project Sponsor - Person funding the project
- Business Project Owner - Person who owns the implementation of the project or product for the business.
- IT Project Owner - Person who owns the IT implementation of the project and the technical support of the final solution.
- IT Business Partner - Person who liases between the business and IT.
- Business SME - Person who provides expertise in requirements gathering and overall expertise in the product or solution.
- Business Project Manager - Person who coordinates the project deliverables from the business side.
- IT Project Manager - Person who coordinates the IT components of the project.

Responsibility Assignment Matrix

| | | | | | | | | | | | | | | | | | | | |
|---|---|--|---|------------|-----------------|-----------------------|-----------------|-----------------------|--------------|-----|-----------------------|---------|------------------|-------------------------|-------------------------|-------------------------|--------------|------------|--|
| Project: | Project Title Here | Project #: | Project Number Here | | | | | | | | | | | | | | | | |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here | | | | | | | | | | | | | | | | |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update | | | | | | | | | | | | | | | | |
| Accounting Code: | PLCF0011 | | | | | | | | | | | | | | | | | | |
| Legend: A: Approves the deliverable R: Reviews C: Creates and or C1 primary, C2 Backup I: Provides input N: Is notified when deliverable is complete M: Manages the deliverables | | Business End Users | Business Sponsor | IT Sponsor | Business Driver | Business Project Lead | Project Manager | Business Sys. Analyst | Data Modeler | DBA | Data Staging Designer | Trainer | Appl'n Developer | Tech/Security Architect | Tech Support Specialist | Data Staging Programmer | Data Steward | QA Analyst | |
| | | Project Management and Requirements | | | | | | | | | | | | | | | | | |
| | | Project Task | | | | | | | | | | | | | | | | | |
| | | Initiation | | | | | | | | | | | | | | | | | |
| | | 1 | Develop preliminary project scope | | | | | | | | | | | | | | | | |
| | | 2 | Identify business need | | | | | | | | | | | | | | | | |
| | | 3 | Develop preliminary budget | | | | | | | | | | | | | | | | |
| | | 4 | Identify preliminary return on investment | | | | | | | | | | | | | | | | |
| | | 5 | Complete project charter | | | | | | | | | | | | | | | | |
| | | Planning | | | | | | | | | | | | | | | | | |
| | | 1 | Establish project identity | | | | | | | | | | | | | | | | |
| | | 2 | Identify project team/resources | | | | | | | | | | | | | | | | |
| | | 3 | Conduct stakeholder analysis | | | | | | | | | | | | | | | | |
| | | 4 | Prepare draft project schedule | | | | | | | | | | | | | | | | |
| 5 | Conduct project kickoff meeting | | | | | | | | | | | | | | | | | | |
| 6 | Gather detailed user requirements | | | | | | | | | | | | | | | | | | |
| 7 | Define current business processes (as is) | | | | | | | | | | | | | | | | | | |
| 8 | Revise project schedule | | | | | | | | | | | | | | | | | | |
| 9 | Develop project communication plan | | | | | | | | | | | | | | | | | | |
| 10 | Develop project organizational structure | | | | | | | | | | | | | | | | | | |
| 11 | Identify training plan | | | | | | | | | | | | | | | | | | |
| 12 | Develop project quality plan | | | | | | | | | | | | | | | | | | |
| 13 | Develop scope management plan | | | | | | | | | | | | | | | | | | |
| 14 | Develop risk management plan | | | | | | | | | | | | | | | | | | |
| 15 | Develop change management plan | | | | | | | | | | | | | | | | | | |

Responsibility Assignment Matrix

| | | | | | | | | | | | | | | | | | | | |
|--|--|--|----------------------------------|------------|-----------------|-----------------------|-----------------|-----------------------|--------------|-----|-----------------------|---------|------------------|-------------------------|-------------------------|-------------------------|--------------|------------|--|
| Project: | Project Title Here | Project #: | Project Number Here | | | | | | | | | | | | | | | | |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here | | | | | | | | | | | | | | | | |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update | | | | | | | | | | | | | | | | |
| Accounting Code: | PLCF0011 | | | | | | | | | | | | | | | | | | |
| <p>Legend: A: Approves the deliverable R: Reviews C: Creates and or C1 primary, C2 Backup I: Provides input N: Is notified when deliverable is complete M: Manages the deliverables</p> | | Business End Users | Business Sponsor | IT Sponsor | Business Driver | Business Project Lead | Project Manager | Business Sys. Analyst | Data Modeler | DBA | Data Staging Designer | Trainer | Appl'n Developer | Tech/Security Architect | Tech Support Specialist | Data Staging Programmer | Data Steward | QA Analyst | |
| | | Project Management and Requirements | | | | | | | | | | | | | | | | | |
| | | Project Task | | | | | | | | | | | | | | | | | |
| | | 16 | Develop cost management plan | | | | | | | | | | | | | | | | |
| | | 17 | Develop schedule management plan | | | | | | | | | | | | | | | | |
| | | 18 | Develop technical specifications | | | | | | | | | | | | | | | | |
| | | 19 | Develop technical architecture | | | | | | | | | | | | | | | | |
| | | 20 | Conduct project procurement | | | | | | | | | | | | | | | | |
| | | 21 | Finalize project budget | | | | | | | | | | | | | | | | |
| | | 22 | Finalize return on investment | | | | | | | | | | | | | | | | |
| | | 23 | Ongoing project management | | | | | | | | | | | | | | | | |
| | | Execution | | | | | | | | | | | | | | | | | |
| | | 1 | Develop training materials | | | | | | | | | | | | | | | | |
| | | 2 | Execute communication plan | | | | | | | | | | | | | | | | |
| 3 | Develop software | | | | | | | | | | | | | | | | | | |
| 4 | Develop new business processes (to be) | | | | | | | | | | | | | | | | | | |
| 5 | Deploy new software | | | | | | | | | | | | | | | | | | |
| 6 | Conduct training | | | | | | | | | | | | | | | | | | |
| Closing | | | | | | | | | | | | | | | | | | | |
| 1 | Get deliverable acceptance | | | | | | | | | | | | | | | | | | |
| 2 | Close out contracts | | | | | | | | | | | | | | | | | | |
| 3 | Finalize budget | | | | | | | | | | | | | | | | | | |
| 4 | Finalize return on investment | | | | | | | | | | | | | | | | | | |
| 5 | Conduct closure survey | | | | | | | | | | | | | | | | | | |

Responsibility Assignment Matrix

| | | | | | | | | | | | | | | | | | | | |
|--|------------------------------------|--|----------------------------------|------------|-----------------|-----------------------|-----------------|-----------------------|--------------|-----|-----------------------|---------|------------------|-------------------------|-------------------------|-------------------------|--------------|------------|--|
| Project: | Project Title Here | Project #: | Project Number Here | | | | | | | | | | | | | | | | |
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| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update | | | | | | | | | | | | | | | | |
| Accounting Code: | PLCF0011 | | | | | | | | | | | | | | | | | | |
| <p>Legend: A: Approves the deliverable R: Reviews C: Creates and or C1 primary, C2 Backup I: Provides input N: Is notified when deliverable is complete M: Manages the deliverables</p> | | Business End Users | Business Sponsor | IT Sponsor | Business Driver | Business Project Lead | Project Manager | Business Sys. Analyst | Data Modeler | DBA | Data Staging Designer | Trainer | Appl'n Developer | Tech/Security Architect | Tech Support Specialist | Data Staging Programmer | Data Steward | QA Analyst | |
| | | Project Management and Requirements | | | | | | | | | | | | | | | | | |
| | | Project Task | | | | | | | | | | | | | | | | | |
| | | 6 | Conduct/document lessons learned | | | | | | | | | | | | | | | | |
| | | 7 | Archive project | | | | | | | | | | | | | | | | |

Assumptions and Constraints

| Project: | Project Title Here | Project #: | Project Number Here | | |
|---------------------------|------------------------------------|---------------------|---------------------|--------|--------------|
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here | | |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update | | |
| Accounting Code: | PLCF0011 | | | | |
| ID | Description | Comments | Type | Status | Date Entered |
| 1 | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |
| 5 | | | | | |
| 6 | | | | | |
| 7 | | | | | |
| 8 | | | | | |
| 9 | | | | | |
| 10 | | | | | |
| 11 | | | | | |
| 12 | | | | | |
| 13 | | | | | |
| 14 | | | | | |
| 15 | | | | | |
| 16 | | | | | |

Decision Log

| Project: | | Project Title Here | Project #: | Project Number Here | |
|---------------------------|----------------------|------------------------------------|---------------------|---------------------|--------------|
| Project Manager: | | Project Manager Name Here | Sponsor: | Sponsor Name Here | |
| Project Artifacts: | | Location of Project Documents Here | Last Update: | Date of Last Update | |
| Accounting Code: | | PLCF0011 | | | |
| ID | Decision Description | Comments | Owner | Status | Date Entered |
| 1 | | | | | |
| 2 | | | | | |
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| 10 | | | | | |
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| 12 | | | | | |
| 13 | | | | | |
| 14 | | | | | |
| 15 | | | | | |
| 16 | | | | | |

Communication Plan

| Project: | | Project Title Here | Project # | Project Number Here | | |
|---------------------------|-------------------------------------|--|------------------|---------------------|------------|-------------------------|
| Project Manager: | | Project Manager Name Here | Sponsor | Sponsor Name Here | | |
| Project Artifacts: | | Location of Project Documents Here | Updated | Date of Last Update | | |
| Accounting Code: | | PLCF0011 | | | | |
| ID | Communication | Description | Frequency | Format | Owner | Recipient/ Attendees |
| 1 | What type of communication is this? | What is the description of the contents/purpose of this communication? | | | Who sends? | Who gets? |
| 2 | | | | | | |
| 3 | | | | | | |
| 4 | | | | | | |
| 5 | | | | | | |
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| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |

Stakeholder Analysis

| | | | | | |
|---------------------------|------------------------------------|---------------------|---------------------|--|--|
| Project: | Project Title Here | Project #: | Project Number Here | | |
| Project Manager: | Project Manager Name Here | Sponsor | Sponsor Name Here | | |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update | | |
| Accounting Code: | PLCF0011 | | | | |

| ID | Stakeholder | Role | Impact | Influence | Risk Tolerance | Needs | Responsibility |
|----|-------------|------|--------|-----------|----------------|-------|----------------|
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | |
| 7 | | | | | | | |
| 8 | | | | | | | |
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| 10 | | | | | | | |
| 11 | | | | | | | |
| 12 | | | | | | | |
| 13 | | | | | | | |
| 14 | | | | | | | |
| 15 | | | | | | | |
| 16 | | | | | | | |

Expectations

| | | | | | | |
|---------------------------|------------------------------------|---------------------|---------------------|---------------------|---------------------|------------------------|
| Project: | Project Title Here | Project #: | Project Number Here | | | |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here | | | |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update | | | |
| Accounting Code: | PLCF0011 | | | | | |
| ID | Expectation Description | Source | Must Have | Want to Have | Nice to Have | Date Identified |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
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Project Change Control Log

| | | | |
|---------------------------|---------------------------|---------------------|------------------------------------|
| Project: | Project Title Here | Project #: | Sponsor Name Here |
| Project #: | Project Number Here | Sponsor: | Location of Project Documents Here |
| Project Artifacts: | Project Manager Name Here | Last Update: | Date of Last Update |
| Accounting Code: | Sponsor Name Here | | |

| Change Control # | Change Request Description | Priority | Requested By | Request Date | Deadline to Resolve | Schedule Impact Delay (days) | Impact on Cost (\$) | Evaluator | Status | Date of Decision | Comments |
|------------------|----------------------------|----------|--------------|--------------|---------------------|------------------------------|---------------------|-----------|--------|------------------|----------|
| 1 | | | | | | | | | | | |
| 2 | | | | | | | | | | | |
| 3 | | | | | | | | | | | |
| 4 | | | | | | | | | | | |
| 5 | | | | | | | | | | | |
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| 15 | | | | | | | | | | | |
| 16 | | | | | | | | | | | |
| 17 | | | | | | | | | | | |
| 18 | | | | | | | | | | | |
| 19 | | | | | | | | | | | |
| 20 | | | | | | | | | | | |

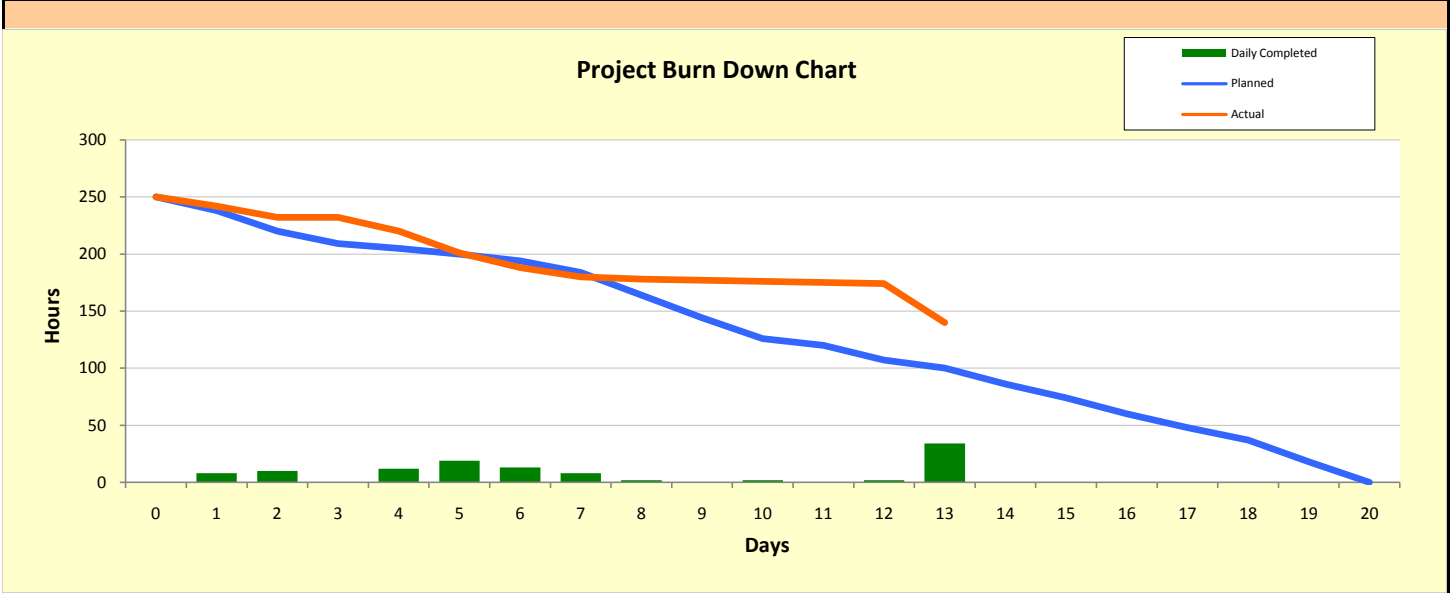
Deliverable Acceptance Register

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project #: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| ID | Deliverable Description | Comments | Evaluator | Status | Date of Decision |
|----|-------------------------|----------|-----------|--------|------------------|
| 1 | | | | | |
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| 11 | | | | | |
| 12 | | | | | |
| 13 | | | | | |
| 14 | | | | | |
| 15 | | | | | |
| 16 | | | | | |

Project Burn Down Chart

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |



| Burned down | | | | | | Comments |
|-------------|---------|--------|---------|--------|-----------------|----------|
| Day | Planned | Actual | Planned | Actual | Daily Completed | |
| 0 | | | 250 | 250 | #N/A | |
| 1 | 12 | 8 | 238 | 242 | 8 | |
| 2 | 18 | 10 | 220 | 232 | 10 | |
| 3 | 11 | 0 | 209 | 232 | 0 | |
| 4 | 4 | 12 | 205 | 220 | 12 | |
| 5 | 5 | 19 | 200 | 201 | 19 | |
| 6 | 6 | 13 | 194 | 188 | 13 | |
| 7 | 10 | 8 | 184 | 180 | 8 | |
| 8 | 20 | 2 | 164 | 178 | 2 | |
| 9 | 20 | | 144 | #N/A | #N/A | |
| 10 | 18 | 2 | 126 | 176 | 2 | |
| 11 | 6 | | 120 | #N/A | #N/A | |
| 12 | 13 | 2 | 107 | 174 | 2 | |
| 13 | 7 | 34 | 100 | 140 | 34 | |
| 14 | 14 | | 86 | #N/A | #N/A | |
| 15 | 12 | | 74 | #N/A | #N/A | |
| 16 | 14 | | 60 | #N/A | #N/A | |
| 17 | 12 | | 48 | #N/A | #N/A | |
| 18 | 11 | | 37 | #N/A | #N/A | |
| 19 | 19 | | 18 | #N/A | #N/A | |
| 20 | 18 | | 0 | #N/A | #N/A | |

Delphi Exercise

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project #: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Score: 1 = Low to 5 = High

| | | | | | | | | | | |
|---------------------|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------------|----------------|
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | 1 | 2 | 2 | 1 | 2 | 2 | 2 | 2 | 14 | 1.75 |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

| | | | | | | | | | | |
|---------------------|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------------|----------------|
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

| | | | | | | | | | | |
|---------------------|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------------|----------------|
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

| | | | | | | | | | | |
|---------------------|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------------|----------------|
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

| | | | | | | | | | | |
|---------------------|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------------|----------------|
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

| | | | | | | | | | | |
|---------------------|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------------|----------------|
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

| Delphi Exercise | | | | | | | | | | |
|----------------------------|------------------------------------|--------|--------|--------|--------|--------------|---------------------|--------|-------|---------|
| Project: | Project Title Here | | | | | Project #: | Project Number Here | | | |
| Project #: | Project Manager Name Here | | | | | Sponsor: | Sponsor Name Here | | | |
| Project Artifacts: | Location of Project Documents Here | | | | | Last Update: | Date of Last Update | | | |
| Accounting Code: | PLCF0011 | | | | | | | | | |
| Score: 1 = Low to 5 = High | | | | | | | | | | |
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |
| | | | | | | | | | | |
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |
| | | | | | | | | | | |
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |
| | | | | | | | | | | |
| Task | Sample task here | | | | | | | | | |
| Team members | Name 1 | Name 2 | Name 3 | Name 4 | Name 5 | Name 6 | Name 7 | Name 8 | Total | Average |
| Most likely | | | | | | | | | 0 | |
| Minimum | | | | | | | | | 0 | |
| Maximum | | | | | | | | | 0 | |

Initial Project Size Estimate

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project #: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

Scope Estimate

Technology Systems Impacted

| | | 1 to 2 | 3 to 5 | 6 or more |
|-----------------------------------|---------------------|--------------------------------------|--------|-------------------|
| # of Business Requirements | Less than 50 | Automatically do; no approval needed | | |
| | 51 - 100 | | | |
| | 100 or more | | | Approval required |

Cost Estimate

of Resources Involved

| | | Less than 10 | 11 to 50 | 51 or More |
|-----------------------------------|---------------------|--------------------------------------|----------|-------------------|
| # of Business Requirements | Less than 50 | Automatically do; no approval needed | | |
| | 51 - 100 | | | |
| | 100 or more | | | Approval required |

Cost Estimate

of Resources Involved

| | | Less than 10 | 11 to 50 | 51 or More |
|----------------|---------------|--------------------------------------|----------|------------|
| Benefit | Low | | | Avoid |
| | Medium | | | |
| | High | Automatically do; no approval needed | | |

IT/QA Requirements Test Matrix

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project #: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

The release contains the following features:

- 1
- 2
- 3
- 4
- 5

| Testing Type | Required (Y or N) | Business Sponsor | IT Sponsor | Business Driver | Business Project Lead | Project Manager | Storage Engineer | Systems Engineer | DBA | Infrastructure | Architecture | Appl'n Developer | Lead Engineer | QA Department Head | QA Manager | QA Project Lead | QA Supervisor |
|--------------|-------------------|------------------|------------|-----------------|-----------------------|-----------------|------------------|------------------|-----|----------------|--------------|------------------|---------------|--------------------|------------|-----------------|---------------|
|--------------|-------------------|------------------|------------|-----------------|-----------------------|-----------------|------------------|------------------|-----|----------------|--------------|------------------|---------------|--------------------|------------|-----------------|---------------|

Quality Testing Requirements

QA Round 1

| | | | | | | | | | | | | | | | | | |
|---|---------------------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1 | Security | | | | | | | | | | | | | | | | |
| 2 | Operational Issues | | | | | | | | | | | | | | | | |
| 3 | Baseline Development | | | | | | | | | | | | | | | | |
| 4 | Initial fail over testing | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | |

QA Round 2

| | | | | | | | | | | | | | | | | | |
|---|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1 | Load Testing | | | | | | | | | | | | | | | | |
| 2 | Performance Testing | | | | | | | | | | | | | | | | |
| 3 | 3rd Party Connectivity | | | | | | | | | | | | | | | | |
| 4 | Orchestration (internal system interfaces) | | | | | | | | | | | | | | | | |
| 5 | Validate fail over | | | | | | | | | | | | | | | | |
| 6 | Run Book review (internal system interfaces) | | | | | | | | | | | | | | | | |
| 7 | Product Support Issues (check that logs do not fill up) | | | | | | | | | | | | | | | | |
| 8 | | | | | | | | | | | | | | | | | |

QA Round 3

| | | | | | | | | | | | | | | | | | |
|---|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1 | Endurance (run at 75-80% capacity for 72 hours minimum) | | | | | | | | | | | | | | | | |
| 2 | Security (external interfaces) | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | |

QA Round 4

| | | | | | | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1 | | | | | | | | | | | | | | | | | |
| 2 | | | | | | | | | | | | | | | | | |
| 3 | | | | | | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | | | | | |

Legend

| | |
|---|--------------------------------------|
| Creates the deliverable | C1: primary creator; C2: contributor |
| Input required | I |
| Reviews the deliverable | R |
| Approves the deliverable | A |
| Notified when the deliverable is complete | N |
| Owens the deliverable upon completion | O |

Project Quality Metrics

| | | | |
|---------------------------|------------------------------------|---------------------|---------------------|
| Project: | Project Title Here | Project #: | Project Number Here |
| Project Manager: | Project Manager Name Here | Sponsor: | Sponsor Name Here |
| Project Artifacts: | Location of Project Documents Here | Last Update: | Date of Last Update |
| Accounting Code: | PLCF0011 | | |

| ID | Critical Success Criteria | Potential Quality Metric | Priority | Metric Target | Action Plan |
|----|---------------------------|--------------------------|----------|---------------|-------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

NPV Calculator

Add custom cash flows or create auto-generated cash flow series (uniform, gradient, and exponential series). You can delete, copy, and insert new columns, but make sure the Sum column is correct after making changes. The Net Present Value for each series is calculated, along with the Total NPV. Edit the light-blue cells. The IRR function is used to calculate the overall Internal Rate of Return. It requires an initial guess.

NPV 14,649.49
IRR 9.054%

Discount Rate (i) 6%

Auto-Generated Cash Flow Series

| Series Type: | Uniform (A) | Gradient (G) | Exp Grad | none |
|----------------------|-------------|--------------|----------|------|
| Value (A, G, or Eo): | 100 | 100 | 100 | |
| g (for Exp Grad): | | | 5% | |
| Periods: | 5 | 10 | 7 | |
| NPV: | 421.24 | 2,960.23 | 674.08 | - |

Custom Cash Flow Series

| | | | |
|-------------|----------|------------|----------|
| 2,148.66 | 4,471.70 | (1,872.95) | 5,846.53 |
| IRR: 16.34% | 9.63% | 4.14% | 8.66% |

| Period | Sum | Series 1 | Series 2 | Series 3 | Series 4 | Label 1 | Label 2 | Label 3 | Label 4 |
|--------|--------------|----------|----------|----------|----------|-------------|-------------|-------------|-------------|
| 0 | (150,000.00) | - | - | - | - | | (40,000.00) | (40,000.00) | (70,000.00) |
| 1 | 18,205.00 | 100.00 | - | 105.00 | - | (10,000.00) | 8,000.00 | 8,000.00 | 12,000.00 |
| 2 | 36,710.25 | 100.00 | 100.00 | 110.25 | - | 3,000.00 | 9,200.00 | 9,200.00 | 15,000.00 |
| 3 | 42,615.76 | 100.00 | 200.00 | 115.76 | - | 4,200.00 | 10,000.00 | 10,000.00 | 18,000.00 |
| 4 | 52,321.55 | 100.00 | 300.00 | 121.55 | - | 6,800.00 | 12,000.00 | 12,000.00 | 21,000.00 |
| 5 | 55,627.63 | 100.00 | 400.00 | 127.63 | - | | 14,500.00 | 14,500.00 | 26,000.00 |
| 6 | (8,365.99) | - | 500.00 | 134.01 | - | | | (9,000.00) | |
| 7 | 740.71 | - | 600.00 | 140.71 | - | | | | |
| 8 | 700.00 | - | 700.00 | - | - | | | | |
| 9 | 800.00 | - | 800.00 | - | - | | | | |
| 10 | 900.00 | - | 900.00 | - | - | | | | |
| 11 | - | - | - | - | - | | | | |
| 12 | - | - | - | - | - | | | | |
| 13 | - | - | - | - | - | | | | |
| 14 | - | - | - | - | - | | | | |
| 15 | - | - | - | - | - | | | | |
| 16 | - | - | - | - | - | | | | |
| 17 | - | - | - | - | - | | | | |
| 18 | - | - | - | - | - | | | | |
| 19 | - | - | - | - | - | | | | |
| 20 | - | - | - | - | - | | | | |
| 21 | - | - | - | - | - | | | | |
| 22 | - | - | - | - | - | | | | |
| 23 | - | - | - | - | - | | | | |
| 24 | - | - | - | - | - | | | | |
| 25 | - | - | - | - | - | | | | |
| 26 | - | - | - | - | - | | | | |
| 27 | - | - | - | - | - | | | | |
| 28 | - | - | - | - | - | | | | |
| 29 | - | - | - | - | - | | | | |
| 30 | - | - | - | - | - | | | | |
| 31 | - | - | - | - | - | | | | |
| 32 | - | - | - | - | - | | | | |
| 33 | - | - | - | - | - | | | | |
| 34 | - | - | - | - | - | | | | |
| 35 | - | - | - | - | - | | | | |
| 36 | - | - | - | - | - | | | | |
| 37 | - | - | - | - | - | | | | |
| 38 | - | - | - | - | - | | | | |
| 39 | - | - | - | - | - | | | | |
| 40 | - | - | - | - | - | | | | |

XIRR, XNPV Calculator

This worksheet uses the XNPV function to calculate the Net Present Value for a schedule of cash flows that are not necessarily periodic. The XNPV function requires the Analysis ToolPak add-in (see Help on XNPV function). It assumes 365 days in the year. The XIRR function is used to calculate the Internal Rate of Return. The dates do not need to be in order. You can have multiple cash flows with the same date.

Discount Rate **8%**

NPV 2,180.51
IRR 37.34%

Using Dynamic Ranges

| Date | Value |
|----------|-------------|
| 1/1/08 | (10,000.00) |
| 3/1/08 | 2,750.00 |
| 10/30/08 | 4,250.00 |
| 2/15/09 | 3,250.00 |
| 4/1/09 | 2,750.00 |

NPV 2,180.51
IRR 37.34%

Using the Exact Range

| Date | Value |
|----------|-------------|
| 1/1/08 | (10,000.00) |
| 3/1/08 | 2,750.00 |
| 10/30/08 | 4,250.00 |
| 2/15/09 | 3,250.00 |
| 4/1/09 | 2,750.00 |

Days in Year **365**

NPV 2,180.51

Using an Array Formula

| Date | Value |
|----------|-------------|
| 1/1/08 | (10,000.00) |
| 3/1/08 | 2,750.00 |
| 10/30/08 | 4,250.00 |
| 2/15/09 | 3,250.00 |
| 4/1/09 | 2,750.00 |

NET PRESENT VALUE CALCULATOR

| | Investment/ Project A | Investment/ Project B | Investment/ Project C |
|---------------------|--------------------------|--------------------------|--------------------------|
| Discount Rate : | 10.00% | 11.00% | 12.00% |
| Period (Year) : | 5 | 6 | 7 |
| Initial Cash Flow : | 125,000.00 | 150,000.00 | 170,000.00 |
| Project NPV : | 137,145.29 | 168,963.09 | 160,641.85 |
| Difference : | 12,145.29 | 18,963.09 | (9,358.15) |
| Percentage : | 9.72% | 12.64% | -5.50% |

| Y | Cashflow | Y | Cashflow | Y | Cashflow |
|---|--------------|---|--------------|---|--------------|
| 0 | (125,000.00) | 0 | (150,000.00) | 0 | (170,000.00) |
| 1 | 50,000.00 | 1 | 50,000.00 | 1 | 50,000.00 |
| 2 | 70,000.00 | 2 | 70,000.00 | 2 | 70,000.00 |
| 3 | 90,000.00 | 3 | 90,000.00 | 3 | 90,000.00 |
| 4 | 90,000.00 | 4 | 120,000.00 | 4 | 120,000.00 |
| 5 | 70,000.00 | 5 | 90,000.00 | 5 | 90,000.00 |
| | | 6 | 70,000.00 | 6 | 70,000.00 |
| | | | | 7 | 50,000.00 |