Enterprise Project Management Office Tracker (ePMO Tracker ®v1.0)

Taking 30 years of project management experience and 15 years consulting experience and aligning that with today's project tracking requirements, industry best practices and the Project Management Institute (PMI) Project Management Body of Knowledge (PMBOK Edition 5), this **project tracking software** has evolved into a custom enterprise Project Management Office (ePMO) program.   As an independent consultant, too often the client provided "Tools" are limited or not flexible enough to exceed client expectations. The key "metric" for any project is "**advance warning"**, not just data. Just having a date telling me when something is due is **just data** but a date that warns me (forecast) that it is has "**potential risk**", then that's data that provides "**predictive risk notification**" or "Velocity of Risk (VoR)" modeling.

One of the unique features with ePMO Tracker are the built-in PLCF and SDLC templates from Business Case to Test Plans, Charters to Risk Plans. Aside from the standard project management tracking of profile information, budget, schedules, task & risk tracking and more, the ePMO Tracker provides a creative way of tracking risks with tools to manage and mitigate the risk factors. The eRisk Tools provide risk analysis during the concept stages to the closeout phase. Being an end user and managing projects, ePMO Tracker provides a simplified approach to Portfolio, Program and Project Management integrated with Risk Management. This presentation has more emphasis on **IT projects** but is also used for **construction projects**.

ePortfolio Screen – Programs are monitored from Approval to Closeout

eDashboard

ePMO Total Cost: $13,130,000

Capital Portfolio: $10,380,000

Program	Health	Budget	Project
Enovia	🟠	$1,380,000	ENOVIA Integration Assessment
Software Consolidation	🟢	$7,000,000	CVS - Agile Pilot
Dashboard	⚫	$2,000,000	Portfolio Integration

Expense Portfolio: $2,750,000

Program	Health	Budget	Project
PMO	🟢	$1,250,000	PLCF Data Relationship Validation
PMO	🟡	$1,500,000	PMBOK Tab Validation

By clicking on Project Name you can open that specific project and drill down on project details
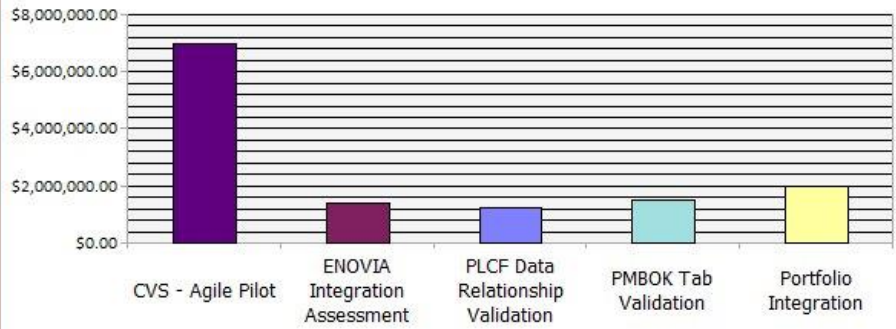
eDashboard - Full Screen
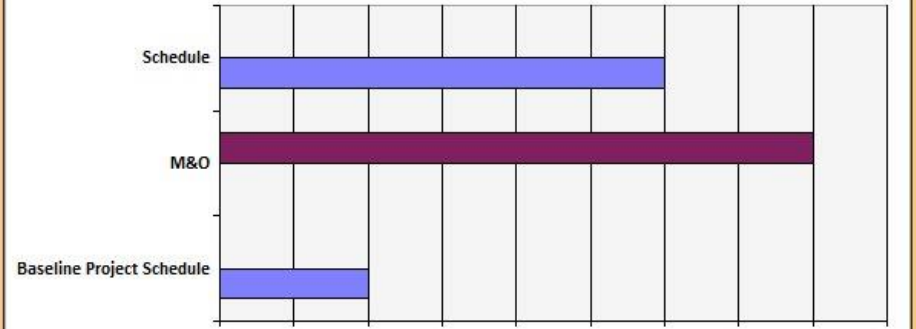
ePortfolio Screen – **Here you can review projects by type**

ePMO Total $: **$13,130,000**

Capital Projects: **$10,380,000**   **Portfolio Health:**

Program	Health	Project Title	Expenditure	Status	Budget	Status	Priority	Visibility	Impact	Risk	End Date
Enovia	●	ENOVIA Integration Assessment	Capital	Active	$1,380,000	●	●	●	●	●	●
Software Consolidation	●	CVS - Agile Pilot	Capital	Pre-Initiation/Approved	$7,000,000	●	●	●	●	●	●
Dashboard	●	Portfolio Integration	Capital	Active	$2,000,000	●	●	●	●	●	●

Expense Projects: **$2,750,000**   **Portfolio Health:**

Program	Health	Project Title	Expenditure	Status	Budget	Status	Priority	Visibility	Impact	Risk	End Date
PMO	●	PLCF Data Relationship Validation	Expense	Active	$1,250,000	●	●	●	●	●	●
PMO	●	PMBOK Tab Validation	Expense	Active	$1,500,000	●	●	●	●	●	●

By clicking on Project Name you can open that specific project and drill down on project details

eProjects Screen – **This is where projects are setup**

Click to open Description Folder to add Project Description and Project Details

Left to Right - RASCI chart, Parametric Estimate, WBS Estimate & Budget Estimate

Opens Project Details

Dashboard

| Health Status: | Funding: | Status: | Priority: | Visibility: | Impact: | Risk: | End Date: | New End Date: |

Risk Scores

Business: 2.9 + Technical: 1.5 = BT Model Score: 2.2   Project Sizing: 3 + Classification Risk: 11 = PCSM: 14   PM Skill Level: 2   Organizational Risk: 10

Project Properties

Field	Value	Field	Value	Field	Value	Field	Value
Program:	Enovia			Project Title:	ENOVIA Integration Assessment		
Project ID:	1	Entered Date:	6/5/2010	Project Manager:	Michael McCormick		
Start Date:	6/28/2010	End Date:	1/28/2011	Schedule:	30 Wks	Schedule Risk Impact:	1 Wks
Completion Date:	2/2/2011	New End Date:	2/1/2011	Schedule Delay:	1 Wks	Actual Completion:	31 Wks
Closed Date:	2/5/2011	Estimate Job Years:	0.58	Revised Schedule:	31 Wks	Total Project Duration:	31 Wks

Project Number: XYZ-0001   Project Category: Information Technology Project   Priority: High

Project Status: Active   Funding Category: Fiscal Budget   Impact: Medium

Award/Contract #:   Expenditure Category: Capital   High Profile: Yes

Short Award/PO #:   Performance Period: Operating Year   Health Score: 2.8

Sponsor/Owner: William McCutcheon   Organization: IBM   Internal Client: Yes

Funding Approved: Yes   Department: Information Technology Division   External Client: No

Project Funding: $380,000.00   Department #: 726F020000   Dept. ID: 715

Current Contract(s): $317,128.00   Funding Balance: $62,872.00   Budget in Days: 245

Current Date
1/29/2014

Print Reports

Risk Adjuster
3.0
Based on the overall Risk Scores, the PM can adjust the overall Project Risk according to the PM's judgement.

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eProjects Description Screen

pTracker Screen – **Project Details with Sub-folders to track project Task from Concept to Closeout.**

Project Details screen showing:

eDashboard	ePortfolio	eProjects	pTracker

Dashboard — Budget: ● Status: ● Priority: ● Visibility: ● Impact: ● Risk: ● End Date: ● New End Date: ●

Project Details Entered Date: 6/5/2010 6:27:16 AM Priority: High Current Date: 7/28/2016 Project Number: XYZ-0001

Project: ENOVIA Integration Assessment

		+/-				
Start Date: 6/28/2010	End Date: 1/28/2011	4 Days	Schedule Wks: 30	Schedule Risk Wks: 1	or 4	Days
Complete Date: 2/2/2011	New End Date: 2/1/2011	1 Days	Schedule Days: 214	Revised Schedule Wks: 31	or 218	Days
Closed Date: 2/5/2011	Estimate Job Years: 0.58		Final Risk Wks: 1	Final Schedule Wks: 31	or 222	Days

Sponsor/Owner: Richard Addis Project Manager: Michael McCormick Budget in Days: 245 Risk Score: 2.5

Budget Status: On Budget Project Status: Active Change Orders: $3,500.00 0.3%

Funding Budget: $1,380,000.00 Funding Balance: $1,175,550.00 Current Task Billings: $204,450.00 84.0%

Performer Cost: $243,509.35 17.6% Less Current Billings: $39,059.35 Available Funds (Bal): $1,132,990.65 82.1%

Project Notes | Milestones/RASCI | Estimates/Budgets | Project Risk | Change Plan | Change Log | PM Report | Project Roles | Docs Log | Lessons Log | Project Closeout

Project Notes

2. 1/10/2011 IBM to submit Mitigation Plan with the removal of their Project Manager by 1/24/2011.
Michael McCormick

3. 1/11/2011 IBM will provide the following Statement of Work (SOW) to NETL for deployment and maintenance support in conjunction with the deployment of an ENOVIA MatrixOne based software solution at NETL.
Michael McCormick

(New).

pTracker Screen – **All project Milestones & RASCI Charts are tracked.**

eDashboard | ePortfolio | eProjects | **pTracker**

Dashboard — Budget: ● Status: ● Priority: ● Visibility: ● Impact: ● Risk: ● End Date: ● New End Date: ●

Project Details

Entered Date: 6/5/2010 6:27:16 AM	Priority: High	Current Date: 7/28/2016		Project Number:	XYZ-0001

Project: **ENOVIA Integration Assessment**

+/-

Start Date:	6/28/2010	End Date:	1/28/2011	4 Days	Schedule Wks:	30	Schedule Risk Wks:	1 or 4	Days
Complete Date:	2/2/2011	New End Date:	2/1/2011	1 Days	Schedule Days:	214	Revised Schedule Wks:	31 or 218	Days
Closed Date:	2/5/2011	Estimate Job Years:	0.58		Final Risk Wks:	1	Final Schedule Wks:	31 or 222	Days

Sponsor/Owner: Richard Addis	Project Manager: Michael McCormick	Budget in Days: 245	Risk Score: 2.5
Budget Status: On Budget	Project Status: Active	Change Orders: $3,500.00	0.3%
Funding Budget: $1,380,000.00	Funding Balance: $1,175,550.00	Current Task Billings: $204,450.00	84.0%
Performer Cost: $243,509.35 17.6%	Less Current Billings: $39,059.35	Available Funds (Bal): $1,132,990.65	82.1%

Project Notes | **Milestones/RASCI** | Estimates/Budgets | Project Risk | Change Plan | Change Log | PM Report | Project Roles | Docs Log | Lessons Log | Project Closeout

Tracks Milestones & RASCI Charts

Note: To edit a task; click on Task Title or select the task item in the row and change as needed.

Milestones

Task Title	Start Date	Due Date	Delay Days	Priority Risk	Status Risk	% Complete	Task Cost	Billings
IBM Project Management Task	7/1/2011	8/26/2011	17	●	●	65%	$46,136.00	$46,000.00
IBM Document Security Data Model Task	7/1/2011	7/11/2011	1	●	●	100%	$28,000.00	$28,000.00
IBM Enterprise Integration Task	7/1/2011	7/12/2011		●	●	50%	$70,900.00	$35,450.00
Total							$243,509.35	$204,450.00

RASCI Charts

RASCI	Type	RASCI Title	Task Title	Status Risk	Priority Risk	Start Date	Due Date	RASCI Status	Chart Co
31	Task	Define Project Roles	IBM Project Management Task	●	●	12/11/2012	12/12/2012	Complete	12/1
34	Project	RASCI Chart Test		●	●	12/18/2012	12/19/2012	In Progress	
Total									

pTracker Screen – All project Milestones

Tracks
Milestones

ePMO Budget Screen – The Budget is built using a WBS structure.

Left to Right - RASCI chart, Parametric Estimate, WBS Estimate & Budget Estimate

| eDashboard | eProjects | pTracker | **Budget** |

Budget #: 10   **ePMO Budget**

Project: ENOVIA Integration Assessment   Budget Title: Enovia Project Budget

Budget Type: Project   Task Title: Risk Status: -1   Budget Status: Approved

Phase: Initiate   Cycle: Requirements Analysis   Cycle Subset: Budget

Project Manager: Michael McCormick   Priority: High   Version #: v1   Version Date: 12/22/2012   Wks

Draft Date: 12/22/2012   5   Days   Due Date: 12/28/2012   6   Days   Budget Start: 10/1/2012   Budget End: 11/22/2012   7

Total Estimate: $380,000   Total Hours: 7,600   Contingency: 0.00 %   Budget Request: $380,000   Approved Budget: $380,000

To Approver: 12/27/2012   Approver: Richard Addis   Approved: Yes   Approval Date: 12/27/2012

	WBS 1	WBS 2	WBS 3	WBS 4	WBS 5	WBS 6	WBS 7	WBS 8	WBS 9	WBS 10	WBS 11	WBS 12
Cost:	$325,000	$55,000	$0	$0	$0	$0	$0	$0	$0	$0	$0	$0
Hours:	6,500	1,100	0	0	0	0	0	0	0	0	0	0

| WBS 1 | WBS 2 | WBS 3 | WBS 4 | WBS 5 | WBS 6 | WBS 7 | WBS 8 | WBS 9 | WBS 10 | WBS 11 | WBS 12 | Budget Notes |

	Phase	Labor Hours	Labor Cost	Material Cost	Travel Cost	Other Cost	Task Total	Actual Total	Total Variance
WBS 1:	Initiate	6,500	$325,000	$0	$0	$0	$325,000	$0	$0

	WBS 1	WBS 2	WBS 3	WBS 4	Cycle	Function						
-	1	1.1			Initiation Phase	Project Analysis						
					6,500	$325,000	$0	$0	$0	$325,000	$0	$0

| | Task | Labor Hours | Labor Cost | Material Cost | Travel Cost | Other Cost | Task Total | Actual Cost | Task Variance |

	WBS 1	WBS 2	WBS 3	WBS 4	Cycle	Function						
-												
					0	$0	$0	$0	$0	$0	$0	$0

| | Task | Labor Hours | Labor Cost | Material Cost | Travel Cost | Other Cost | Task Total | Actual Cost | Task Variance |

pTracker Screen – **Estimates & Budgets are tracked.**

Tracks Estimates & Budgets

pTracker Screen – Tracking Project related Risk

eDashboard	ePortfolio	eProjects	**pTracker**

Dashboard   Budget: 🟢   Status: 🟢   Priority: 🔴   Visibility: 🔴   Impact: 🟡   Risk: 🟡   End Date: 🟠   New End Date: 🟢

Project Details   **Entered Date:** 6/5/2010 6:27:16 AM   **Priority:** High   **Current Date:** 1/29/2014   **Project Number:** XYZ-0001

Project: ENOVIA Integration Assessment

+/-

Start Date: 6/28/2010	**End Date:** 1/28/2011	4 **Days**	**Schedule Wks:** 30	**Schedule Risk Wks:** 1	or	4	**Days**
Complete Date: 2/2/2011	**New End Date:** 2/1/2011	1 **Days**	**Schedule Days:** 214	**Revised Schedule Wks:** 31	or	218	**Days**
Closed Date: 2/5/2011	**Estimate Job Years:** 0.58		**Final Risk Wks:** 1	**Final Schedule Wks:** 31	or	222	**Days**

Sponsor/Owner: William McCutcheon   **Project Manager:** Michael McCormick   **Budget in Days:** 245   **Risk Score:** 3.0

Budget Status: On Budget   **Project Status:** Active   **Change Orders:** $3,500.00   2.6%

Funding Budget: $380,000.00   **Funding Balance:** $175,550.00   **Current Task Billings:** $204,450.00   84.0%

Performer Cost: $243,509.35   64.1%   **Less Current Billings:** $39,059.35   **Available Funds (Bal):** $132,990.65   35.0%

Project Details	Milestones/RASCI	Estimates/Budgets	**Project Risk**	Change Plan	Change Log	PM Report	Project Roles	Docs Log	Lessons Log	Closeout

Note: eProject will track individual Risk Mitigation actions for each Risk to track potential cost impact to the Project.

Title	Risk Cost Impact	Due Date	Priority	PTL	Status	STL	Schedule Risk (Days)	DDTL	Category	
eRisk Report Test	$1,000.00	12/7/2010	Medium	🟡	Resolved	🟢	4	🟢	Baseline Project Schedule	
eRisk Report Test	$500.00	12/7/2010	Medium	🟡	Resolved	🟢	4	🟢	Baseline Project Schedule	
Security Model Validation	$1,000.00	2/7/2011	Medium	🟡	Open	🟡	5	🟡	1	M
Total	$2,500.00									

By Clicking on the Title listed in the **Project Risk** folder will open that specific **Risk Record**.

Refer to next page to see **eRisk Tracker**

Velocity of Risk Model (VoR) next page.

eDashboard | ePortfolio | eProjects | pTracker | eRisk Tracker

Current Date: 1/29/2014

Dashboard Priority: ⬤ Status: ⬤ Schedule: ⬤ eRisk: ⬤ Cost Impact: ⬤

eRisk Chart Legend ■Low ■Low/Medium ■Medium ■Medium/High ■High

eRisk ID: 1 **eRisk Title:** eRisk Report Test
eRisk Description:
Report printing test, printer default, PDF and email attachment.

Risk Details
Project Name: ENOVIA Integration Assessment
Assigned To: Kimberly Addis Add Project Manager: Michael McCormick Add
eRisk Owner: Organization Priority: Medium ☐ Critical Path
Organization: National Energy Technology Labratories 12/13/2010 **Next Milestone**
Client Office: Information Technology Division $1,500.00 **Cost Impact**
Opened Date: 12/3/2010 Milestone Event: Final Deployment
Status: Resolved Phase: Pre-Initiation
Milestone Date: 12/7/2010 Cycle: System Concept Development
1. Man Days: 4 Planned Category: Baseline Project Schedule
2. Man Days: 5 Actual Impact Days: 1 eRisk Closed: 12/8/2010 ⬤

eRisk Comments | Mitigation Plan | Mitigation Steps | eRisk Contingency Plan | eRisk Overview

Source Person: Date Identified: ☐ Cost Impact
eRisk Comments:
all reports to be tested

eRisk Comments History:
[Version: 12/6/2010 3:14:20 PM] all reports to be tested by
[Version: 12/6/2010 3:14:34 PM] all reports to be tested

1 - Cost eRisk Area
Probability: 4.0
Impact: 0.5
Max Impact: 2.25

2 - Schedule eRisk Area
Probability: 2.0
Impact: 3.0
Max Impact: 2.50

3 - Technical eRisk Area
Probability: 0.0
Impact: 0.0
Max Impact: 0.00

4 - Other eRisk Area
Probability: 0.0
Impact: 0.0
Max Impact: 0.00

eRisk Summary
Project Starts Project Ends eRisk Resolved
6/28/2010 1/28/2011 12/8/2010

eRisk Velocity (RoV) Impact
Short Term eRisk Mid Term eRisk
2 days ➡ 12 days
Earliest Impact Late Impact Critical Impact
12/9/2010 12/19/2010 ⬤ 10 days

Overall eRisk Impact
eRAV	PPMax	PIMax	PMaxImpact
2	3.0	1.8	2.38

eRisk Status: Monitor
eRisk Area: Cost/Schedule/Technical
eRisk Control: Internal/External
eRisk Source: Human Factors

Tools / Reports
Print Reports Filter by Opened Date

Tools
» Browse All eRisk
» Search eRisk
» Edit Categories

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eRisk Tracker VoR Screen – shows the potential velocity "time" of the risk.

eDashboard | **pTracker**

6/16/2013

Dashboard

Budget: 🟢 Status: 🟢 Priority: 🔴 Visibility: 🔴 Impact: 🟡 Risk: 🟡 End Date: 🟠 New End Date: 🟢

Project Details: ENOVIA Integration Assessment

Project Number: XYZ-0001

Start Date: 6/28/2010	End Date: 1/28/2011	4	+/- Days	Schedule Wks: 30	Schedule Risk Wks: 1 or 4	Days
Complete Date: 2/2/2011	New End Date: 2/1/2011	1	Days	Schedule Days: 214	Revised Schedule Wks: 31 or 218	Days
Closed Date: 2/5/2011	Estimate Job Years: 0.58			Final Risk Wks: 1	Final Schedule Wks: 31 or 222	Days

Budget Status: On Budget   Priority: High   Project Status: Active   Change Orders: $3,500.00 0.9%

Funding Budget: $380,000.00   Funding Balance: $62,872.00   Current Task Billings: $204,450.00 64.5%

Performer Cost: $317,128.00 83.5%   Performer Balance: $39,059.35   Available Funds (Bal): $20,312.65 5.3%

Project Notes | Milestones/RASCI | Estimates/Budgets | Project Risk | Change Plan | **Change Log** | PM Report | Project Roles | Docs Log | Lessons Log | Closeout

CC #	Change Title	Contract Name	Request Date	Due Date	Status	Cost Estimate	Approval Status	Change Risk	Pr
12	My What A test	PCR #7 SOW URKT-7HQLXW	11/5/2012	11/9/2012	Complete	$3,500.00	Approved	🟠	
13	Today's CC Log test	PCR #7 SOW URKT-7HQLXW	10/30/2012	11/12/2012	In Progress	$500.00	Reviewing	🟡	
17	A Test To Validate	Upgrade test	10/31/2012	11/5/2012	In Progress	$2,000.00	Reviewing	🟢	
Total	3					$6,000.00			

By Clicking on the **Title** listed in the **Change Log** folder will open that specific **CC#**.

pTracker Screen – Tracking Project Manager Reports

eDashboard	eProjects	**pTracker**

6/17/2013

Dashboard   Budget: 🟢   Status: 🟢   Priority: 🔴   Visibility: 🔴   Impact: 🟡   Risk: 🟡   End Date: 🟠   New End Date: 🟢

Project Details: **ENOVIA Integration Assessment**   **Project Number:** XYZ-0001

Start Date:	6/28/2010	End Date:	1/28/2011	4	+/- Days	Schedule Wks:	30	Schedule Risk Wks:	1	or	4	Days
Complete Date:	2/2/2011	New End Date:	2/1/2011	1	Days	Schedule Days:	214	Revised Schedule Wks:	31	or	218	Days
Closed Date:	2/5/2011	Estimate Job Years:	0.58			Final Risk Wks:	1	Final Schedule Wks:	31	or	222	Days

Budget Status:	On Budget	Priority:	High	Project Status:	Active	Change Orders:	$3,500.00	0.9%
Funding Budget:	$380,000.00		Funding Balance:	$62,872.00	Current Task Billings:	$204,450.00	64.5%
Performer Cost:	$317,128.00	83.5%	Performer Balance:	$39,059.35	Available Funds (Bal):	$20,312.65	5.3%

| Project Notes | Milestones/RASCI | Estimates/Budgets | Project Risk | Change Plan | Change Log | **PM Report** | Project Roles | Docs Log | Lessons Log | Closeout |

➕

Report # ▾	Report Date ▾	PM ▾	Report Period Begins ▾	Report Period Ends ▾	Report Period (Days) ▾
2	6/27/2011	Ashley Abbott	6/13/2011	6/24/2011	11
4	7/12/2011	Ashley Abbott	7/4/2011	7/11/2011	7
7	7/11/2011	Ashley Abbott	6/27/2011	7/4/2011	7
9	7/12/2011	Ashley Abbott			

By Clicking on the Report **#** listed in the **PM Report** folder will open that specific **Report#**.

See example on next page.

Project Weekly Status Report

Project Title: ENOVIA Integration Assessment   **PM:** Ashley Abbott

Report #: 2   **Report Date:** 6/27/2011   **Report Period (Days):** 11   **Report Period Begins:** 6/13/2011   **Report Period Ends:** 6/24/2011

Project Status

Dashboard	Budget: 🟢	Status: 🟢	Priority: 🔴	Visibility: 🔴	Impact: 🟡	Risk: 🟡	End Date: 🟠	New End Date: 🟢

Priority:	High	**Start Date:**	6/28/2010	**End Date:**	1/28/2011	**Project Number:**	XYZ-0001
Complete Date:	2/2/2011	**New End Date:**	2/1/2011	**Schedule Wks:**	30	**Revised Schedule Wks:**	1
Closed Date:	2/5/2011	**Estimate Job Years:**	0.58	**Schedule Plus Wks:**	1	**Revised Risk Wks:**	31
Budget in Days:	245	**Risk Score:**	3.0	**Total Schedule Wks:**	31	**Final Risk Wks:**	1
Funding Budget:	$380,000.00			**Funding Balance:**	$175,550.00		
Task Estimate:	$243,509.35	64.1%		**Less Current Billings:**	$39,059.35		
Change Orders:	$3,500.00	2.6%		**Current Task Billings:**	$204,450.00	84.0%	
Available Funds (Bal):	$132,990.65	35.0%					

Project Report

The Test Summary Report was completed in the Test Phase and was developed by the organization responsible for the formal testing of the application. A Test Summary Report was completed at the end of testing to document the results. It summarizes the testing activities that were performed during the development of a system or system release. It describes any variances between the testing that was planned and the testing that actually occurred.

It also provides a summary of the test results that were achieved from the testing, as well as provides an evaluation of the test items. This includes identification of significant problems or defects that were encountered and resolved during testing, their corresponding resolutions, as well as any unresolved problems or defects that were encountered and a plan of action for their resolution. It also details each test case executed with the date it was tested and by whom, and whether the test case passed or failed based upon the acceptance criteria.

Overall, the project is a success even with the minor delay impact due to the data defects in the code requiring additional testing days.

Prepared By: Ashley Abbott
ePMO - Project Status Report

Monday, March 04, 2013   8:12 PM   Page 1 of 1

Project Progress Report

Project:	**ENOVIA Integration Assessment**	**Risk Score:** 3
Project Manager:	Michael McCormick	**Start Date:** 6/28/2010
Project #:	XYZ-0001	**End Date:** 1/28/2011 `4` Days
Priority:	`High` **Status:** Active	**Revised End Date:** 2/1/2011 `1` Days
Revised Risk Wks: 109	**Funding:** 🟢 **Impact:** 🟡 **Risk:** 🟡	**End Date:** 🟠 **New End Date:** 🟢

Project Notes:

#: 2   1/10/2011   IBM to submit Mitigation Plan with the removal of their Project Manager by 1/24/2011.

#: 3   1/11/2011   IBM will provide the following Statement of Work (SOW) to NETL for deployment and maintenance support in conjunction with the deployment of an ENOVIA MatrixOne based software solution at NETL.

Project Description:
IBM will provide the following Statement of Work (SOW) to NETL for deployment and maintenance support in conjunction with the deployment of an ENOVIA MatrixOne based software solution at NETL. This solution provides continued support of NETL specific ENOVIA MatrixOne code enhancements, previously delivered code and software implementation related issues to address the following NETL business issues:

IBM's Approach
IBM proposes to address these business issues using hourly services approach under a fixed price contract type. This approach provides NETL a price structure for different resources and a mix of tasks described in this SOW.

The tasks include:
1. ENOVIA MatrixOne Custom Code Maintenance Support (Custom and Embedded);
2. Installing software upgrades on NETL's Test and Development and Production environments
3. Assisting with documenting data and security model for ENOVIA MatrixOne
4. Correcting Label Deficiencies identified by NETL
5. Correcting maintenance request identified in Appendix C-1
6. Assisting with reporting interfaces between ENOVIA MatrixOne and COGNOS
7. Assisting with Fossil Energy dashboard development and the DOE CFO's Dashboard development
8. Tracking and Reporting of Custom and Base Code maintenance requests
9. Development Oversight and Project Management

Current Project Tasks:

Title	Due Date	Delay Days	Assigned To	Status	% Complete
IBM Project Plane (MS Project format)	`7/2/2011`	`1`	Craig Estridge	`At Risk`	0.00%
Comments: 7-5-2010 - Received IBM's Project Plan on Saturday (7-3-2010) in Excel format. The plan was rejected for non-compliance with SOW. Requested resubmit by 7-5-2010 in MS Project.					
IBM Document Security Data Model Task	`7/11/2011`		Craig Estridge	`At Risk`	100.00%
Comments:					
IBM Enterprise Integration Task	`7/12/2011`		Craig Estridge	`No Activity`	50.00%
Comments:					

Project:	**ENOVIA Integration Assessment**	**Risk Score:** 3
Project Manager:	Michael McCormick	**Start Date:** 6/28/2010
Project #:	XYZ-0001	**End Date:** 1/28/2011 `4` Days
Priority:	`High` **Status:** Active	**Revised End Date:** 2/1/2011 `1` Days
Revised Risk Wks: 109	**Funding:** 🟢 **Impact:** 🟡 **Risk:** 🟡	**End Date:** 🟠 **New End Date:** 🟢

Title	Due Date		Assigned To	Status	% Complete
IBM Dashboard and Reporting Support Task	`7/13/2011`		Craig Estridge	`No Activity`	0.00%
Comments:					
IBM Label Discrepancies Task	`8/19/2011`		Craig Estridge	`At Risk`	0.00%
Comments:					
IBM Project Management Task	`8/26/2011`	`17`	Craig Estridge	Rebaselined	65.00%
Comments: A test.					
IBM Emergency Ad-Hoc Support	`9/1/2011`		Craig Estridge	Deferred	0.00%
Comments:					

Current Contract Tasks:

Title	Due Date	Assigned To	Status	% Complete	Priority
Contractor: Keylogic Systems Inc.					
Thursday's Test Also	11/8/2012		In Progress	0.00%	`High`

Title	Due Date	Assigned To	Status	% Complete	Priority
Contractor: Platinum Solutions Inc.					
Thursday Event Testing	11/8/2012		In Progress	0.00%	`High`
C'Man	11/8/2012		Not Started	0.00%	Normal
1st Test	11/2/2012		In Progress	0.00%	Normal
Test Contract Task Link	11/8/2012		Not Started	0.00%	Normal

Title	Due Date	Assigned To	Status	% Complete	Priority
Contractor: International Business Machines Corporation					
Appendix A: A-2: Weekly Project Status Report		Craig Estridge	Not Started	0.00%	Medium
2.1 Project Scope Task 3.0 Report interface with COGNOS		Craig Estridge	At Risk	0.00%	`High`
2.1 Project Scope Task 4.0 - Dashboards		Craig Estridge	At Risk	0.00%	Medium
2.0 Project Scope Task 6 - Project Management Services		Craig Estridge	In Progress	0.00%	Medium
2.0 Project Scope Task 8 - Data Architecture Diagram & Security Model		Craig Estridge	At Risk	0.00%	Medium
2.2 IBM - Project Management		Craig Estridge	At Risk	0.00%	Medium
2.2 PM - Subtask 2 - Project Tracking & Reporting		Craig Estridge	At Risk	0.00%	Medium

By Clicking on the Project Role ID **#** listed in the **Project Roles** folder will open that specific **Role#**.

By Clicking the **Edit** button, you can Review, Update & Print the Position Description for this Role.

eMethodology Lifecycle Screen – Here you select the project methodology process(s) – Agile, ePLCF or PMBOK.

eDashboard | eProjects | pTracker | **pMethodology Lifecycle**

Dashboard   Health ● eAgile: ● ePLCF: ● ePFAL: ● eALC: ● eSDLC: ● PMBOK: ● TBD: ● TBD: ●

Project Properties

Program: Enovia		**Project Title:** ENOVIA Integration Assessment	
Entered Date: 6/5/2010	**Project Manager:** Michael McCormick		
Start Date: 6/28/2010	**End Date:** 1/28/2011	**Schedule:** 30 Wks	**Schedule Risk Impact:** 1 Wks
Completion Date: 2/2/2011	**New End Date:** 2/1/2011	**Schedule Delay:** 1 Wks	**Actual Completion:** 31 Wks
Closed Date: 2/5/2011	**Estimate Job Years:** 0.58	**Revised Schedule:** 31 Wks	**Total Project Duration:** 31 Wks

Document Control

Document ID	Title	Category	Type	📎	Version	Attachment Date	Submitter
3	Test 3	ePLCF	Action Item	📎(1)	v1	3/5/2013 3:46:37 PM	
4	New Test	ePLCF	Action Item	📎(1)	v1	3/5/2013 4:09:52 PM	

All documents are tracked for each phase and project overall, providing accurate schedule activities with performance status in the Dashboard

eDashboard | eProjects | ePLCF

PLCF Overview | Project Management Guide | Estimating Guide | Lessons Learned Guide | Refresh | eRisk Tracker | Close Folder

Dashboard PLCF: ⚫ PI: ⚫ IP: ⚫ PP: ⚫ EP: ⚫ MC: ⚫ CP: ⚫ OM: ⚫

Project: ENOVIA MatrixOne Integration Start Date: 1/3/2011 Due Date: 4/4/2011 Actual Date: 4/25/2011 Delay Days: 21

Documents: PI: (1) IP: (0) PP: (0) EP: (0) MC: (0) CP: (0) OM: (0) Delay Weeks: 3

PI Task Review | IP Task Review | PP Task Review | EP Task Review | MC Task Review | CP Task Review | OM Task Review Total Days: 91

PLCF Overview | Pre-Initiation (PI) | Initiation Phase (IP) | Planning Phase (PP) | Execution Phase (EP) | Monitoring/Controlling (MC) | Closing Phase (CP) | Operations/Maintenance (OM) | Additional Tools

PI STEPS - Business Transition Management Process (BTMP) PI Overview | PI Flow Chart | BTMP Guide | Project Library | Meeting Mintues

Start Date: 1/3/2011 Due Date: 1/14/2011 Days to Process: 11 Actual Date: 1/21/2011 Delay Days: 7 Status: In Progress

Instructions: Complete each required PI Step and place all completed documents in the PI Documents box above. Actual PI completion date is when Lessons Learned is approved.

Pre-Initiation (PI) Task

Step 1 - PI1 Performance Measures Plan PI1 Plan | PI1.1 SMART | PI1.2 Metrics | PI1.3 Plan Guide Days to Process: 16

This plan helps to define critical success indicators and factors for change projects. These indicators and factors are measures that accurately reflect the critical aspects of organizational processes, functions, relationships, and outputs. This document identifies each critical change project indicators and factors and using SMART and Metrics will assist with completing this task. The Plan Guide will help with how to conduct a Performance Measures Plan.

Status: Approved Start Date: 1/3/2011 Due Date: 1/5/2011 Submitted : 1/5/2011 Approved: 1/6/2011 Revision #: v1

Step 2 - PI2 Environmental Scan PI2 Template Days to Process: 0

Environmental scanning is a research and analysis process. These scans look for trends that suggest the need to change. Typically, these scans address demographics, technology ,market shifts, social and political pressures, and organizational pressures as determined by organizational effectiveness, which is usually measured by performance objectives and organizational arrangements.

Status: Start Date: 12/27/2010 Due Date: Submitted : Approved: 12/27/2010 Revision #: v1

Step 3 - PI3 Project Concept Statement PI3 Template | PI3.1 Stakeholder | PI3.2 COTS Process | PI3.3 COTS Rediness Days to Process: 4

Before expending time and resources with implementing the Business Case processes below, use the Project Concept Statement which is the foundation for making the decision to initate a project. Once approved, this will initiate the Business Case processes below.

Status: Start Date: 1/3/2011 Due Date: Submitted : Approved: 1/7/2011 Revision #:

Step 4 - PI4 Current State PI4 Template Days to Process: 10

This template is used to describe the current business as detailed as possible in terms of the business function, functional processes, process activities, and activity inputs and outpouts.

Status: Start Date: 12/27/2010 Due Date: Submitted : Approved: 1/6/2011 Revision #:

Step 5 - PI5 Future State PI5 Template Days to Process: 10

This template is used to describe the future business as detailed as possible in terms of the business function, functional processes, process activities, and activity inputs and

ePMO Calendar – Track all activities (meetings, follow-up, events) and Add Activities to your Outlook Calendar

ePMO Calendar – Add Activity to Calendar

ePMO Calendar Outlook Feature

ePMO Calendar List – View & Review all activities

ePMO Risk Models – **Project Classification Model**

Risk Models *Dashboard*

Business Risk: 2.0 + Technical Risk: 1.5 =	BT Model Score: 1.8	Organizational Risk: 10
Project Sizing: 2 + Classification Risk: 7 =	PCSM: 9	PM Skill Level: 2

Close Folder

Risk ID: 1   Project: ENOVIA Integration Assessment

Project Classification Model | Business Risk Model | Technical Risk Model | Risk Chart | Risk Chart Overview | PM Skills Calculator | Organizational Risks

Project Classification and Sizing Model (PCSM)

Project Sizing: ●   Classification Risk: ●   PCSM Assessment: ●

Prepared By: Michael McCormick   Prepared Date: 6/28/2011

Sizing Matrix

Project Class	Work Effort (Hours)
1	80 - 200
2	201 - 1,000
3	1,001 - 5,000
4	5,001 - 20,000
5	>20,000
2	Select Class Number

Risk Matrix

Risk Factor	Low 0	Medium 1	High 2	Very High 3	Score
Team Size(# of bodies)	<5	5 – 9	10 – 14	>15	1
# Workgroups involved	1 – 2	3 – 4	5 – 6	>7	1
Technology / Technique / Process	Expert	Familiar	New to IT	Break-through	1
Complexity	The solution is well defined and no problems are expected	The solution is known but some problems are expected	There is more than one approach to achieving the project goal	The solution is not known or only vaguely defined	2
Political Profile / Impact	Org Unit	Director Area	VP/CIO	Enterprise-wide	2
Scoring	0 – 10 No change to classification 11 – 13 Increase class 1 level 14 – 15 Increase class 2 levels		**RISK TOTAL:**	7	

Project Classification

Project Class from Sizing Chart	2
Risk Factor	7
Project Risk Assessment	9