

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

The screenshot displays the eDashboard interface. At the top right, it shows "ePMO Total Cost: \$13,130,000". Below this, there are two main sections: "Capital Portfolio: \$10,380,000" and "Expense Portfolio: \$2,750,000". Each section contains a table with columns for Program, Health, Budget, and Project. A red arrow points to the "Portfolio Integration" project in the Capital Portfolio table.

Program	Health	Budget	Project
Enovia	Orange	\$1,380,000	ENOVIA Integration Assessment
Software Consolidation	Green	\$7,000,000	CVS - Agile Pilot
Dashboard	Black	\$2,000,000	Portfolio Integration

Program	Health	Budget	Project
PMO	Green	\$1,250,000	PLCF Data Relationship Validation
PMO	Yellow	\$1,500,000	PMBOK Tab Validation

Michael McCormick © 2016 All Rights Reserved

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

eDashboard - Full Screen

eDashboard

ePMO Total Cost: \$13,130,000

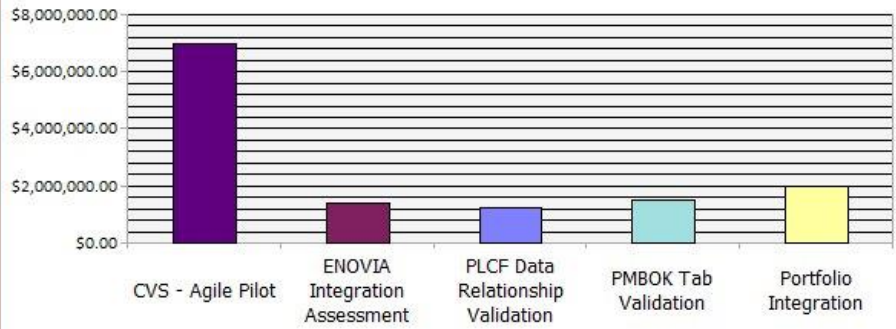
Capital Portfolio: \$10,380,000

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

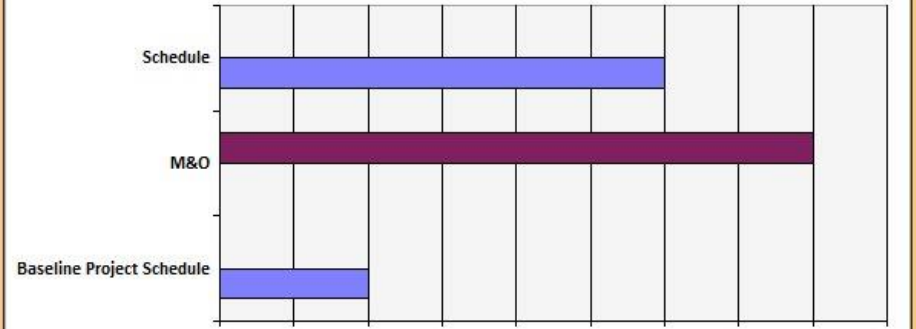
Expense Portfolio: \$2,750,000

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

Project Budget



Issues by Category



Michael McCormick © 2016 All Rights Reserved

ePortfolio Screen – Here you can review projects by type

The screenshot displays the ePortfolio interface. At the top, there are navigation tabs for 'eDashboard' and 'ePortfolio'. Below the tabs is a toolbar with various icons. A red arrow points from the 'ePortfolio' tab to the main content area. The main content area is divided into two sections: 'Capital Projects' and 'Expense Projects'. Each section has a total budget and a 'Portfolio Health' indicator. The 'Capital Projects' section shows three projects: 'Enovia', 'Software Consolidation', and 'Dashboard'. The 'Expense Projects' section shows two projects: 'PMO' and 'PMO'. A red arrow points to the 'PMBOK Tab Validation' project name in the 'Expense Projects' table.

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

Program: Enovia	Project Title: ENOVIA Integration Assessment	
Project ID: <input type="text"/>	Entered Date: 6/5/2010	Project Manager: Michael McCormick
Start Date: 6/28/2010	End Date: 1/28/2011	Schedule: 30 Wks
Completion Date: 2/2/2011	New End Date: 2/1/2011	Schedule Delay: 1 Wks
Closed Date: 2/5/2011	Estimate Job Years: 0.58	Revised Schedule: 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.

Michael McCormick © 2014 All Rights Reserved

eProjects Description Screen

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

The screenshot displays the eProjects application interface. At the top, there is a navigation bar with tabs for 'eDashboard', 'ePortfolio', and 'eProjects'. Below this is a toolbar with various icons, including a folder icon highlighted by a red arrow. The main content area is divided into several sections:

- Dashboard:** Shows 'Risk Scores' with a 'Business' score of 2.9.
- Project Properties:** A list of fields including Program, Project ID, Start Date, Completion Date, Closed Date, Project Number, Project Status, Award/Contract #, Short Award/PO #, Sponsor/Owner, Funding Approved, Project Funding, and Current Contract(s).
- Project Summary:** A central window titled 'Project Description' containing:
 - Project Summary:** A paragraph describing the Statement of Work (SOW) for deployment and maintenance support.
 - IBM's Approach:** A paragraph explaining the hourly services approach under a fixed price contract.
 - The tasks include:** A numbered list of 9 tasks, such as 'ENOVIA MatrixOne Custom Code Maintenance Support' and 'Installing software upgrades'.
 - Project Details:** A large empty text area for additional information.
- Right Panel:** Contains 'New End Date', 'Organizational Risk' (score 10), 'Current Date' (1/29/2014), 'Print Reports' (with icons), and 'Risk Adjuster' (set to 3.0).

At the bottom right, there is a copyright notice: '© McCormick © 2014 All Rights Reserved'.

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

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	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

Tracks
Milestones

Task ID: 4

Project: ENOVIA Integration Assessment

Task Title: IBM Project Management Task

Assigned To: Craig Estridge Project Role: Performer Project Manager

Priority: Medium Status: Rebaselined

Milestone Type: Performer Deliverable Task Type: SOW Task

Milestone Owner: External Deliverable: Submitted Late

Task Requirement: SOW Requirement Acceptance: Rejected - 1st Resubmit

Description: Project Plan - 5 days Mon 6/28/10 Fri 7/2/10
Weekly Status Report - 48 days Mon 6/28/10 Wed 9/1/10
Monthly Status Report - 48 days Mon 6/28/10 Wed 9/1/10
Project Management Activities - 48 days Mon 6/28/10 Wed 9/1/10

% Complete: 65%

Duration: 56 Days or 8.0 Weeks = 73.0 Days or 10.4 Weeks

Current Risk: 4

Start Date: 7/1/2011

Due Date: 8/26/2011

Received On: 9/12/2011

Delay Days: 17

Estimate: Yes

Estimate Request: 9/13/2011

Task Cost

Approved Cost: \$46,136.00

Billings: \$46,000.00 (99.7%)

Task Balance: \$136.00 (0.3%)

Duration Benchmark

Days Required	Percentage
6	10 %
11	20 %
17	30 %
22	40 %
28	50 %
34	60 %
39	70 %
45	80 %
50	90 %
56	100 %

Rebaseline Project Task (Change Order)

Start Date: 9/19/2011 Cost Impact: No

Due Date: 10/19/2011 Current Risk: 0

Received On: 10/19/2011 Delay Type: Performer

Schedule: 30 Days Delay Days: 0

Risk Calculator RASCI Charts Parametric Estimates Budget Estimates Budgets Notes/Comments

Task Risk Calculator

Start Date	Due Date	% Complete	Today	Task Days	Days Req.	Days Burned	Days Delay	% Late	Days Left	Risk Score
9/19/2011	10/19/2011	36%	9/30/2011	30	10	11	1	3%	19	2
7/1/2011	8/26/2011	0%	7/1/2011	0	0	0	0	0%	0	0

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** +D WBS WBS+ - [Refresh] [Save] [Print] [Email] [Close]

Project: ENOVIA Integration Assessment **Budget Title:** Enovia Project Budget

Budget Type: Project **Task Title:** **Risk Status:** -1 [Green] **Budget Status:** Approved [Green]

Phase: Initiate **Cycle:** Requirements Analysis **Cycle Subst:** Budget [Green]

Project Manager: Michael McCormick [Green] **Priority:** High [Red] **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

WBS 1	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	Labor Hours	Labor Cost	Material Cost	Travel Cost	Other Cost	Task Total	Actual Cost	Task Variance
1	1.1			Initiation Phase	Project Analysis	6,500	\$325,000	\$0	\$0	\$0	\$325,000	\$0	\$0

WBS 1	WBS 2	WBS 3	WBS 4	Cycle	Function	Labor Hours	Labor Cost	Material Cost	Travel Cost	Other Cost	Task Total	Actual Cost	Task Variance
						0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

pTracker Screen – Estimates & Budgets are tracked.

eDashboard ePortfolio eProjects pTracker

CONTRACT Risk Calendar Home Help Logout Refresh Print Search Mail

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%

Tracks Estimates & Budgets

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

Parametric Estimates

ID	Estimate Type	Title	Task	Due Date	Forecast Cost	Forecast Cost (Low)	Forecast Cost (High)
10	Task	Security Model Cost Estimate	IBM Project Management Task	12/10/2012	\$10,000	\$7,000	
12	Task	Dashboard Cost Estimate	IBM Enterprise Integration Task	12/10/2012	\$5,500	\$3,850	
13	Task	PM Cost Estimate		12/12/2012	\$110,000	\$77,000	

WBS Estimates

Estimate #	Estimate Type	Task Title	Estimate Total	Estimate Date	Due Date	Date Submitted	Estimate Days	Version #
2	Task	IBM Emergency Ad-Hoc Support	\$24,336	12/5/2012	12/7/2012	12/7/2012	2	v1
3	Task	IBM Project Management Task	\$2,750	12/28/2012	12/31/2012	12/29/2012	1	v1

Budgets

Budget #	Estimate Type	Budget Title	Task Title	Budget Request	Approved	Approved Amount	Priority Level	Status
10	Project	Enovia Project Budget		\$380,000	Yes	\$380,000	●	●
Total				\$490,000		\$380,000		

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
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**

eProjects eRisks Tracker – This eRisk Model is used throughout the project lifecycle.

Velocity of Risk Model (VoR) next page.

Navigation: eDashboard | ePortfolio | eProjects | pTracker | **eRisk Tracker**

Tools: [Icons] VoR [Docs] Current Date: 1/29/2014

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

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

eRisk ID: **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 Laboratories **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 ●

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: 2 days → Mid Term eRisk: 12 days
 Earliest Impact: 12/9/2010 Late Impact: 12/19/2010 Critical Impact: 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

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

Tools / Reports

Print Reports **Filter by Opened Date**

Tools
 >> Browse All eRisk
 >> Search eRisk
 >> Edit Categories

Michael McCormick © 2014 All Rights Reserved

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

Dashboard
Current Date: 3/4/2013

eRisk ID: 1
eRisk Title: eRisk Report Test
Project Name: ENOVIA Integration Assessment

Risk Details

Assigned To: Kimberly Addis

Project Manager: Michael McCormick

Opened Date: 12/3/2010 \$1,500.00 Cost Impact

Status: Resolved 12/13/2010 Next Milestone

Priority: Medium Critical Path

Milestone Date: 12/7/2010 eRisk Closed: 12/8/2010

1. Man Days: 4 Planned

Impact Days: 1

2. Man Days: 5 Actual

Milestone Event: Final Deployment

Phase: Pre-Initiation

Cycle: System Concept Development

Category: Requirements Analysis

■ Low
 ■ Low/Medium
 ■ Medium
 ■ Medium/High
 ■ High

● = eRisk
● = RMaxImpact
● = eRisk & RMaxImpact are Equal
↗ = Velocity of Risk (VoR)

eRisk Summary

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

eRisk Velocity (VoR) Impact

Short Term eRisk: 2 days Mid Term eRisk: 12 days

Earliest Impact: 12/9/2010 Late Impact: 12/19/2010 Critical Impact: 10 days

Overall eRisk Impact

eRAV: 1 PPMax: 4.0 PIMax: 0.5 RMxImpact: 2.25

eRisk Details

eRisk Status: Monitor

eRisk Area: Cost/Schedule/Technical

eRisk Control: Internal/External

eRisk Source: Human Factors

Michael McCormick © 2013 All Rights Reserved

pTracker Screen – Tracking Change Request

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#.

Michael McCormick © 2013 All Rights Reserved

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

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:**

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	9/3/2011		Craig Estridge	Deferred	0.00%
Comments:					

Current Contract Tasks:

Title	Due Date	Assigned To	Status	% Complete	Priority
Contractor: <u>Keylogic Systems Inc.</u>					
Thursday's Test Also	11/8/2012		In Progress	0.00%	High
Contractor: <u>Platinum Solutions Inc.</u>					
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
Contractor: <u>International Business Machines Corporation</u>					
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

pTracker Screen – Tracking Project Roles (Team Members)

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

Project Role ID	Role	Team Member	Organization	Employee	Contractor	Consultant	R
1	Project Manager	Michael McCormick	Information Technology Division	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
5	Client Project Manager (Client Rep)	Harry Abernathy	Administrative Support Division	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Te

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

Project Roles

Project Role ID: 1

Project: ENOVIA Integration Assessment Date Prepared: 2/14/2011

Organization: Information Technology Division Project Phase: PLCF (All Phases) Role Status: Permanent

Team Member: Michael McCormick Add Employee Contractor Consultant Skill Level: 15+ yrs

Role: Project Manager

Additional Duties:

Select Position Description To Print/Edit

Description ID: 1 Role: Project Manager

pTracker Screen – Tracking Project Manager Reports

Project Role ID: [1]

Project: ENOVIA Integration Assessment

Organization: Information Technology Division

Team Member: Michael McCormick

Role: Project Manager

Select Position Description To Print/Edit

Description ID: [1] Role: Project Manager

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

Project Role ID: [1]

Role: Project Manager

Role Description:

The person responsible for developing, in conjunction with the Project Sponsor, a definition of the project. The Project Manager then ensures that the project is delivered on time, to budget and to the required quality standard (within agreed specifications). He/she ensures the project is effectively resourced and manages relationships with a wide range of groups (including all project contributors).

The Project Manager is also responsible for managing the work of consultants, allocating and utilizing resources in an efficient manner and maintaining a co-operative, motivated and successful team. Responsible for facilitating the project by using the project management processes, organizing the project, and managing the team work activities consistent with the approved work plan.

The Project Manager is responsible for planning, directing and overseeing the project, and ensuring that deliverables and

Authority:

1. Confer with project personnel to identify and resolve problems.
2. Negotiate with project stakeholders or suppliers to obtain resources or materials.
3. Coordinate recruitment or selection of project personnel.
4. Initiate, review, or approve modifications to project plans.
5. Assign duties, responsibilities, and spans of authority to project personnel.

Responsibility:

The Project Manager is responsible for planning, directing and overseeing the project, and ensuring that deliverables and functionality are achieved as defined in the Project Charter, funding documentation and subsequent project plans. The Project Manager is also responsible for the management of all resources assigned to the project, serves as the primary liaison between the project and the PMO, and escalates decisions and issues as needed. The Project Manager coordinates project related issues with other efforts, reviews and resolves project issues not resolved at lower levels, and directs the project management functions. The Project Manager acts as the principle interface to the contractors. The Project Manager is accountable to the PMO (if applicable) and Sponsor for all the project office management related activities and for the development, maintenance, and adherence to the PMO infrastructure and supporting methodologies (e.g. processes, procedures, standards, and templates) that are in compliance with the organization, PMBOK 4th Edition and Best Practices and policies.

Initiating: Note* the initial champions are responsible to initiate the project during the Pre-Initiation/Initiation Phase; project

Qualifications:

Education/ Experience

1. PMP (Project Management Professional) Certification or equivalent preferred.
2. Bachelor's Degree or higher in Engineering, Technology or related field.
3. Minimum 5-10 years of project management or IT Management.
4. Minimum 3 years experience coordinating and/supporting IT business processes.
5. Program/Product Managers require scheduling and budgeting experience.

Communication Skills

1. Verbal / Nonverbal – Convey easily and quickly any message; Speaks clearly and persuasively in positive or negative situations; listens attentively and seeks clarification; Responds well to questions; Maintain professional nonverbal communication analogous to situation

Competencies:

PROJECT/PRACTICE RELATED COMPETENCIES

Project / Practice Management

1. Creates and executes project work plans and revises as appropriate to meet changing needs and requirements.
2. Identifies resources needed and assigns individual responsibilities.
3. Manages day-to-day operational aspects of a project and scope.
4. Reviews deliverables prepared by team before passing to client.
5. Effectively applies our methodology and enforces project standards.
6. Prepares for engagement reviews and quality assurance procedures.
7. Minimizes our exposure and risk on project.
8. Ensures project documents are complete, current, and stored appropriately.

Pre-Initiation (IP) Screen – This is where project documents are tracked throughout the project life cycle.

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

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: 0(1) IP: 0(0) PP: 0(0) EP: 0(0) MC: 0(0) CP: 0(0) OM: 0(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 Minutes

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 initiate 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 outputs.

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

Activity Type: Completed: Employee: February, 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 New	2 New
3 New	4 New	5 New	6 New	7 New	8 New	9 New
10 New	11 New	12 New	13 New	14 New	15 New	16 New
17 New	18 New	19 New	20 New	21 New McCormick, Kristen	22 New McCormick, Michael	23 New
24 New	25 New	26 New	27 New	28 New		

ePMO Calendar – Add Activity to Calendar

Activity

Activity

Project:

Activity Type: + Contact: +

Activity Date: Employee: +

Activity Time: Purpose: +

Completed?: Outcome: +

Description:

Notes:

ePMO Calendar Outlook Feature

Add Outlook Appointment

Appointment Date: 2/27/2013

Appointment Time: 3:38 PM

Duration: Minutes Hours Days Weeks

Subject:

Reminder: Minutes Hours Days Weeks

Notes:

Note: This will open your Outlook login screen, add the appointment to your Calendar and then close Outlook login/Profile screen. Next time you open your Outlook, the Appointment will be there.

Michael McCormick © 2013 All Rights Reserved

ePMO Calendar List – View & Review all activities

eDashboard eProjects Activities Activities

Activities
Wednesday, February 27, 2013

Quick Search: Search Activities Total Records: 2 Activity Type: (All) Completed: (All)

New Activity

Event	Projects	Activity Type	Contact	Employee Name	Activity Date	Activity Time	Completed?	Purpose	Outcome	C
Open	ENOVIA Integration Assessment	Meeting	Michael, McCormick	Jean	2/22/2013	10:00 AM		Provide Information		2/21
Open	PLCF Data Relationship Validation	Task	Kristen, McCormick	McCormick	2/21/2013			Event		2/21
*										

ePMO Risk Models – Project Classification Model

eDashboard eProjects eRisk 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

Risk ID: Project:

Project Classification Model | | | | | |

Project Classification and Sizing Model (PCSM)

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

Prepared By: Prepared Date:

Sizing Matrix		Risk Matrix					Project Classification		
Project Class	Work Effort (Hours)	Risk Factor	Low 0	Medium 1	High 2	Very High 3	Score	Project Class from Sizing Chart	Risk Factor
1	80 - 200	Team Size(# of bodies)	<5	5 - 9	10 - 14	>15	1 <input type="button" value="v"/>	2	
2	201 - 1,000	# Workgroups involved	1 - 2	3 - 4	5 - 6	>7	1 <input type="button" value="v"/>		
3	1,001 - 5,000	Technology / Technique / Process	Expert	Familiar	New to IT	Break-through	1 <input type="button" value="v"/>	7	Risk Factor
4	5,001 - 20,000	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 <input type="button" value="v"/>		
5	>20,000	Political Profile / Impact	Org Unit	Director Area	VP/CIO	Enterprise-wide	2 <input type="button" value="v"/>		
2 <input type="button" value="v"/>	Select Class Number	Scoring	0 - 10 No change to classification 11 - 13 Increase class 1 level 14 - 15 Increase class 2 levels			RISK TOTAL:	7	Project Risk Assessment	9