

Contents

1.001	Actuals by Transaction Type	5
1.002	All Resources	5
1.003	Balance	5
1.004	Capital vs. Expense Budget and Forecast	6
1.005	Capital vs. Expense by Period	6
1.006	Capital vs. Expense Variance by Period	6
1.007	Change Requests	7
1.008	Cost and Effort Performance	7
1.009	Cost and Schedule Overview	8
1.010	Current Issues	8
1.011	Current Issues Listing.....	9
1.012	Demand Analysis	9
1.013	Demand Ranking.....	10
1.014	Demand Summary	10
1.015	Earned Value Analysis by Phase	11
1.016	Financial Capitalization by Investment.....	11
1.017	Financial Forecast Review by Investment	12
1.018	Financials	13
1.019	Ideas Categorized by Type.....	14
1.020	Incoming Demand	14
1.021	Investment Baseline vs. Plan by Task	15
1.022	Investment Gantt.....	15
1.023	Investment Time and Estimate Review	16
1.024	Investment Timesheet Review	17
1.025	Investment Timesheet Summary	18
1.026	Investments	19
1.027	Issue Management	19
1.028	Issues	20
1.029	Issues by Priority.....	20
1.030	Issues Listing	21
1.031	Key Performance Indicators	21
1.032	KPIs by Project Type	22
1.033	KPIs by Project Type	22
1.034	Late Tasks and Milestones.....	23

1.035	Milestones	24
1.036	Milestones	24
1.037	My Portfolios	25
1.038	Pending Estimates	25
1.039	Pending Estimates Review.....	25
1.040	Portfolio Benefits and Costs	26
1.041	Portfolio Benefits by Goal.....	27
1.042	Portfolio Role Capacity and Demand.....	28
1.043	Posted Transaction Review *	28
1.044	Posted Transaction Review [Investment level] *	29
1.045	Prioritization of Investments	29
1.046	Prioritized Issues.....	29
1.047	Prioritized Issues Listing **	30
1.048	Process Bottlenecks *	30
1.049	Program Manager Cost Dashboard	31
1.050	Program Manager Schedule Dashboard.....	31
1.052	Project Analysis.....	32
1.053	Project Baselines.....	33
1.054	Project Cost and Effort	33
1.055	Project Cost and Effort	34
1.056	Project Cost by Phase *	35
1.057	Project Cost by Resource *	35
1.058	Project Cost by Task *	36
1.059	Project Cycle Time Analysis	36
1.060	Project Deliverables Review *	37
1.061	Project Indicators.....	37
1.062	Project KPIs by OBS.....	38
1.063	Project KPIs by OBS.....	38
1.064	Project Lifecycle Review	39
1.065	Project Manager Cost and Effort Dashboard	39
1.066	Project Manager Schedule Dashboard	40
1.067	Project Planned Cost	40
1.068	Project Review	41
1.069	Project Schedule	42
1.070	Project Schedule	43

1.071	Project Schedule	44
1.072	Project Status.....	45
1.073	Project Status Detail	45
1.074	Project Status Reports Summary.....	46
1.075	Project Status Summary	47
1.076	Project Storyboard.....	48
1.077	Quick Metrics.....	49
1.078	Recent Project Activity	49
1.079	Resource Allocation	50
1.080	Resource Assignments	51
1.081	Resource Capacity and Allocation	51
1.082	Resource Demand	52
1.083	Resource Demand on Investments.....	53
1.084	Resource Shortages and Allocations	53
1.085	Resource Supply	54
1.086	Resource Utilization.....	54
1.087	Resource Utilization Percentage by Month.....	55
1.088	Resource Work Queue.....	56
1.089	Risk Management.....	57
1.090	Risks	58
1.091	Role Supply and Demand Histogram	58
1.092	Schedule and Progress.....	59
1.093	Schedule Performance	60
1.094	Schedule Performance	60
1.095	Schedule Performance Details	61
1.096	Schedule Performance Details	61
1.097	Staffing.....	62
1.098	Staffing Details.....	63
1.099	Staffing Outlook.....	64
1.0100	Staffing Outlook Details.....	65
1.0101	Status Report Indicators	65
1.0102	Status Reports	66
1.0103	Tasks	66
1.0104	Team Capacity	66
1.0105	Team Member Task Summary.....	67

1.0106	Team Utilization.....	68
1.0107	Timesheet Notes *	68
1.0108	Timesheet Review	68
1.0109	Timesheet Review	69
1.0110	Top 50 Project Watchlist	70
1.0111	Unfilled Requirements.....	71
1.0112	Unstaffed Allocations by Project Type	72
1.0113	Upcoming Milestones.....	73
1.0114	Upcoming Milestones.....	73
1.0115	Weekly Detail of Resource Allocation	74

Clarity Additional Content from Accelerators and Solution Pack

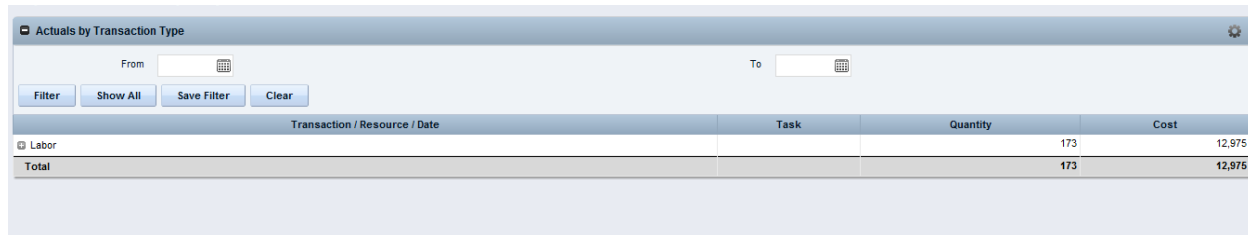
1.001 Actuals by Transaction Type

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. For v3.0)

Query Used: Actuals by Transaction Type

The Actuals by Transaction Type portlet displays the actual cost totals organized by the transaction type. Transaction types include: equipment, expense, labor, and material. Pulls Transactions (grouped by Transaction Type) from ppa_wip entries over a given date range. Defaults to system currency.



Transaction / Resource / Date	Task	Quantity	Cost
Labor		173	12,975
Total		173	12,975

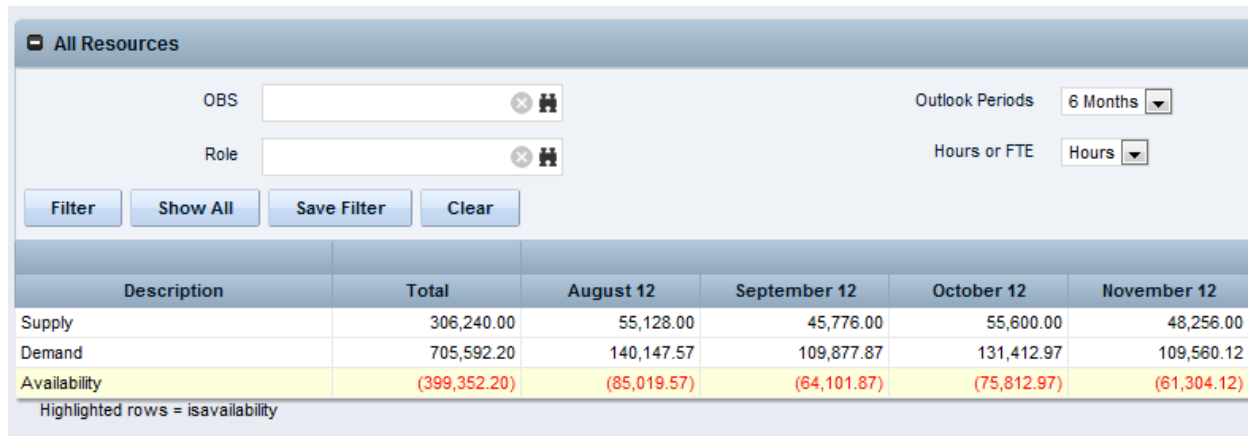
1.002 All Resources

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Resource Availability and Allocation

Use this portlet to view resource gaps for the entire organization or for a specific OBS or role. Information appears for six months, starting with the current month. Security on Resources. Displays Availability and Allocation for resources by OBS assignment (resources need to have OBS set).



Description	Total	August 12	September 12	October 12	November 12
Supply	306,240.00	55,128.00	45,776.00	55,600.00	48,256.00
Demand	705,592.20	140,147.57	109,877.87	131,412.97	109,560.12
Availability	(399,352.20)	(85,019.57)	(64,101.87)	(75,812.97)	(61,304.12)

Highlighted rows = isavailability

1.003 Balance

Type: Chart Portlet

Source: : PMO Accelerator v3.0 (Enh. For v3.0)

Query Used: System Provider: Portfolio: All Investment Types

The Balance portlet is a bubble graph that displays how the planned cost and risk of investments balance between their business alignment and finish dates.

1.004 Capital vs. Expense Budget and Forecast

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. For v3.0)

Query Used: Capital vs Expense Budget and Forecast

The Capital vs Expense Budget and Forecast portlet displays budget, actual, forecast, and variance for each investment included in a portfolio. Use this portlet to compare budget to forecast capital and expense cost of the portfolio investments. Security on Portfolio. Displays data that is portfolio specific. Pulls actuals from ppa_wip tables, and chargecodes from prchargecode

Capital vs Expense Budget and Forecast										
Investment	Budget (Capital)	Budget (Expense)	Budget (Total)	Actual (Capital)	Actual (Expense)	Actual (Total)	Forecast (Capital)	Forecast (Expense)	Forecast (Total)	Budget to Forecast Var (Capital)
Project #4		0	0	0	0	0	0	0	0	◆
Test Idea		0	0	0	0	0	0	0	0	◆
Test Project	39,316	0	39,316	12,975	0	12,975	12,975	0	12,975	◆
Total	39,316	0	39,316	12,975	0	12,975	12,975	0	12,975	26,341
Highlighted rows = Approved										

1.005 Capital vs. Expense by Period

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. For v3.0)

Query Used: Capital vs Expense by Period

The Capital vs Expense by Period portlet displays planned cost by fiscal period, and in total, for each investment included in a portfolio. Use this portlet to compare planned capital to planned expense cost of the investments. Security on Portfolio. Portfolio-specific results. Pulls actuals from ppa_wip tables and chargecodes from prchargecode.

Capital vs Expense by Period												
Investment	Total Planned Capital	Total Planned Expense	Total Planned Investment	Planned								A
				Dec 26, 2011-Jan 25, 2012	Jan 26, 2012-Feb 25, 2012	Feb 26, 2012-Mar 25, 2012	Mar 26, 2012-Apr 25, 2012	Apr 26, 2012-May 25, 2012	May 26, 2012-Jun 25, 2012	Jun 26, 2012-Jul 25, 2012	Jul 26, 2012-Aug 25, 2012	
				Capital	Capital	Capital	Capital	Capital	Capital	Capital	Capital	
Test Project	90,960	0	90,960	70,168	18,292	0	0	2,500	0	0	0	
Project #4	0	0	0									
Test Idea	0	0	0									
Total	90,960	0	90,960	70,168	18,292	0	0	2,500	0	0	0	
Highlighted rows = Approved												
■ = Required												

1.006 Capital vs. Expense Variance by Period

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. For v3.0)

Query Used: Capital vs Expense by Period

The Capital vs Expense Variance by Period portlet displays planned, actual and variance cost by fiscal period, as well as planned cost in total, for each investment included in a portfolio. Security on Portfolio. Portfolio-specific results. Pulls actuals from ppa_wip tables and chargecodes from prchargecode.

Capital vs Expense Variance by Period																								
			Dec 26, 2011-Jan 25, 2012			Jan 26, 2012-Feb 25, 2012			Feb 26, 2012-Mar 25, 2012			Mar 26, 2012-Apr 25, 2012			Apr 26, 2012-May 25, 2012			May 26, 2012-Jun 25, 2012			Jun 26, 2012-Jul 25, 2012			
			Capital			Capital			Capital			Capital			Capital			Capital			Capital			
	Total Planned Capital	Total Planned Expense	Total Planned Investment	Planned	Actual	Var	Planned	Actual	Var	Planned	Actual	Var	Planned	Actual	Var	Planned	Actual	Var	Planned	Actual	Var	Planned	Actual	Var
Investment																								
Test Project	90,960	0	90,960	70,168	6,225	63,943	18,292	4,500	13,792	0	0	0	0	2,250	(2,250)	2,500	0	2,500	0	0	0	0	0	0
Project #4	0	0	0																					
Test Idea	0	0	0																					
Total	90,960	0	90,960	70,168	6,225	63,943	18,292	4,500	13,792	0	0	0	0	2,250	(2,250)	2,500	0	2,500	0	0	0	0	0	0
Highlighted rows = Approved																								
❑ = Required																								

1.007 Change Requests

Type: Grid Portlet

Source: Clarity PPM Essentials Accelerator

Query Used: Change Requests

The Change Requests portlet shows the status of change requests selected to display on status reports. Security on Portlet and Change Requests. Restricted to CRs for active projects only.

Change Requests									
Project▲	Change Request Description	Status	Effective Date	Priority	Impact Severity	Category	Closed Date	Owner	
Test Project		Open		❌		Organizational Culture		Gallinger, Brian	✉

Displaying 1 - 1 of 1

1.008 Cost and Effort Performance

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query Used: Cost and Effort Performance

The Cost and Effort Performance portlet displays cost and effort performance amounts and variances for investments included in a portfolio. Use this portlet to analyze the effort and cost of ongoing portfolio investments. Uses internal @INVESTMENT_SQL@. NOTE: The calculation of EAC vs. Planned is only accurate if the investments have no children in the hierarchy. If hierarchies exist, then the calculation will not be valid because Planned Cost considers the hierarchy and EAC does not in this query.

Cost and Effort Performance																
Investment▲	Manager	Start	Finish	BAC	Actuals	ETC	EAC	Projected Effort Variance	Projected Effort Variance %	BAC Cost	ETC Cost	Actual Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %	Cost Drill Down
Project #4	Gallinger, Brian	2/28/12	4/29/12		0	0	0			0	0	0	0	0		➡
Test Idea	Gallinger, Brian	2/13/12	2/13/12		0	0	0				0	0	0			➡
Test Project	Gallinger, Brian	12/26/11	2/28/13	13,491	285	10,933	11,218	(2,273)		144,407	0	3,632	3,632	(140,775)		➡
Total				13,491	285	10,933	11,218	(2,273)		144,407	0	3,632	3,632	(140,775)		
Highlighted rows = Approved																

1.009 Cost and Schedule Overview

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query Used: Cost and Schedule Overview

The Cost and Schedule Overview portlet shows metrics, performance indicators, and risk information of each project associated to a program. Use this portlet to analyze the performance of ongoing projects. Security on Project. Uses odf_project_v2 for actuals and other calculations.

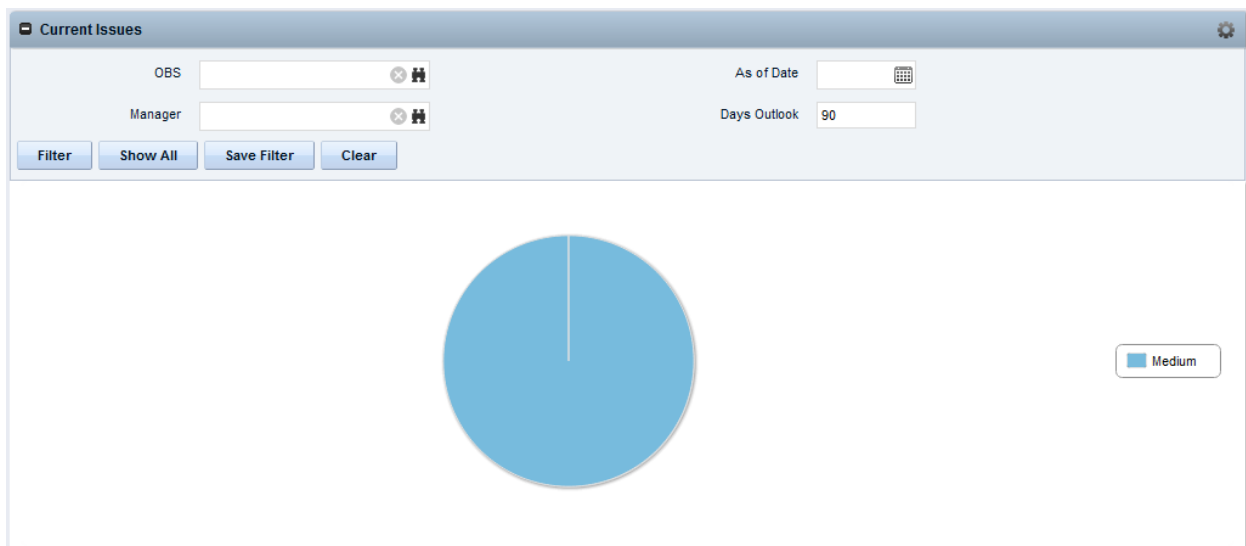
1.010 Current Issues

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query used: Current Issues

The Current Issues portlet displays issues within the days outlook, grouped by priority across projects, displayed as a pie chart. Issues are not included in this portlet if their status is “Resolved” or “Closed”. Security on Project and Issues. Displays non-closed/resolved Issues only. Defaults to 45 days if range not assigned by user.



1.011 Current Issues Listing

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query used: Current Issues Listing

Use this portlet to drill down from the Current Issues portlet and assess the priority and schedule of the issues and decide on action plans to resolve them. Security on Project and Issues. Displays active, non-closed/resolved issues.

Project	Issue	Description	Priority	Schedule	Target Resolution	Category	Owner	Email
Test Project	Test Issue		High	On Track	9/28/12	Funding	Gallinger, Brian	

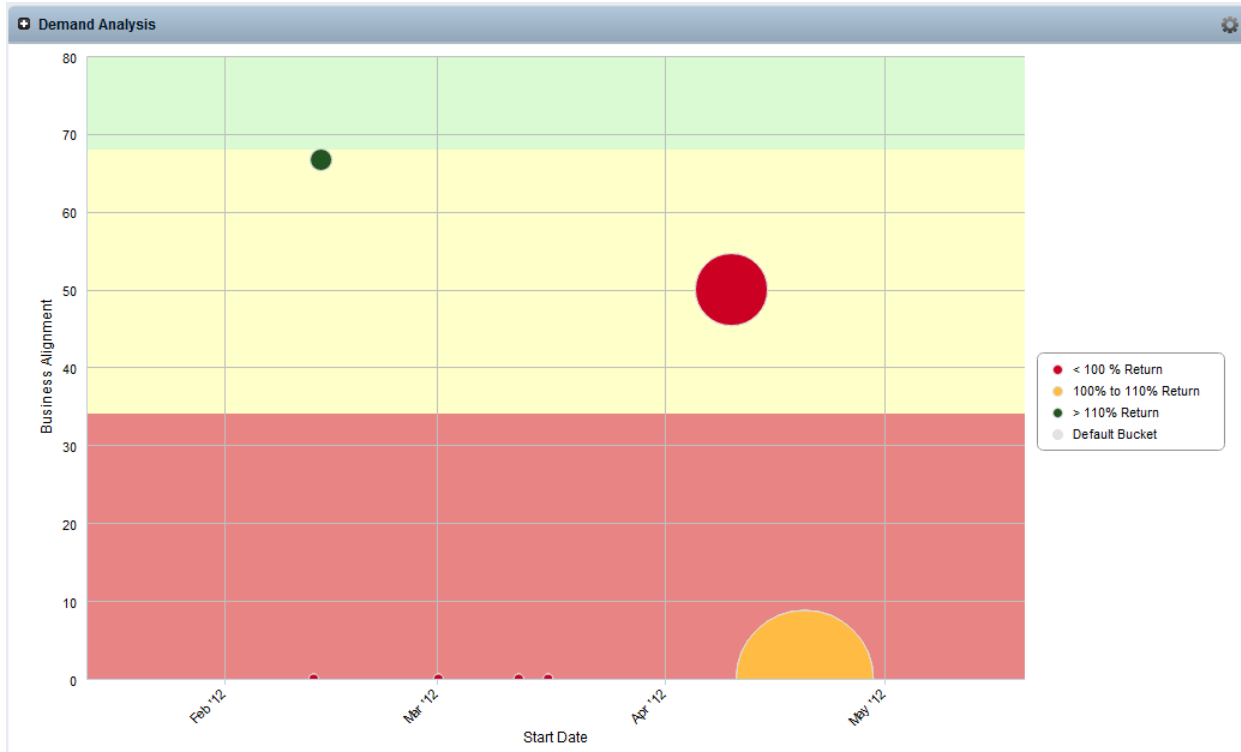
1.012 Demand Analysis

Type: Chart Portlet

Source: PPM Essentials Accelerator v2.0

Query: Demand Analysis

The Demand Analysis portlet displays cost, ROI, and business alignment information for ideas in a bubble chart format. Security on Ideas.



1.013 Demand Ranking

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query: System Provider: content.odmd.dmdRanking

The Demand Ranking portlet lists ideas ranked by their business alignment values.

Demand Ranking

OBS

Resource Limit

Type

All

Budget Limit

Include

Yes

Filter

Show All

Save Filter

Clear

Include	Subject	Requestor	Budget	Budget Running Total	Resource ETC	Resource ETC Running Total	Business Alignment
✓	New Test Idea	User, Team	100,000.00	100,000.00	0	0	67

Displaying 1 - 1 of 1

1.014 Demand Summary

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query: Demand Summary

Gives you a summarized view of total idea costs and displays all ideas in the pipeline. Security on Ideas. Restricted to active Investments only.

Demand Summary		
OBS	<input type="text"/>	Budget Limit <input type="text"/>
Idea Type	All	Resource Limit <input type="text"/>
Status	All	
Filter	Show All	Save Filter Clear
Description	Budget	Resources
Budget Limit	0	0
Total Budget to Date	1,600,000	4,552
Available	(1,600,000)	(4,552)
Displaying 1 - 3 of 3		

1.015 Earned Value Analysis by Phase

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query: Earned Value Analysis by Phase

Use the Earned Value Phase Analysis portlet to track work performance to account for cost and schedule variances. Security on Project. Displays on Project. Uses odf_task_v2 for actuals and EV numbers, PRTASK.prWBSSequence for Phase information.

Earned Value Analysis by Phase							
Phase Status All							
Filter	Show All	Save Filter	Clear				
Phase	Planned Value (BCWS)	Earned Value (BCWP)	Actual Cost (ACWP)	Cost Variance (CV)	Schedule Variance (SV)	Cost Performance Index (CPI)	Schedule Performance Index (SPI)
Cooper Sub 1	0	0	0	0	0		
Test Timesheet Rights	0	0	0	0	0		
Initiation Phase	0	0	0	0	0		
Initiation Phase	0	0	0	0	0		
Initiate	0	0	0	0	0		
Cooper Sub 1	0	0	0	0	0		
Ann's Training Project	0	0	0	0	0		
Another project	0	0	0	0	0		
VFB - 1 - Open WorkBench	0	0	0	0	0		
Brian G Test Project	0	0	0	0	0		
Total	20,891,508.915372	153,174.343995	785,639	(632,464.656005)	(20,738,335)		
Page 1 of 12							
Displaying 1 - 10 of 115							

1.016 Financial Capitalization by Investment

Type: Crystal Report

Source: Clarity Solution Pack

Query: N/A

Financial report displaying planned vs. Actual Capital and Expense costs with three configurable layers of grouping for precision drilldown reporting.

Financial Capitalization (USD)

Investment	Start Date	Finish Date	Planned	Capital Planned	Capital Actual	Capital Planned Remaining	Capital % Spent	Expense Planned	Expense Actual	Expense Planned Remaining	Expense % Spent
Quinn, Randy											
Client Services Application	2/1/2012	8/31/2012	214,800.00	119,200.00	0.00	119,200.00	0.00	95,600.00	0.00	95,600.00	0.00
eCommerce Portal	10/4/2011	10/8/2012	368,300.00	342,300.00	6,000.00	336,300.00	1.75	26,000.00	0.00	26,000.00	0.00
Global Expense Application	1/2/2012	12/29/2012	837,000.00	525,000.00	0.00	525,000.00	0.00	312,000.00	5,250.00	306,750.00	1.68
Online Customer Release	4/3/2012	8/3/2012	270,400.00	0.00	0.00	0.00	0.00	270,400.00	0.00	270,400.00	0.00
Online Order Entry	1/2/2012	8/26/2012	734,000.00	680,000.00	0.00	680,000.00	0.00	54,000.00	62,880.00	-8,880.00	116.44
Online Orders	12/12/2011	8/27/2012	378,400.00	232,800.00	12,000.00	220,800.00	5.15	145,600.00	59,714.30	85,885.70	41.01
Quinn, Randy Total			2,802,900.00	1,899,300.00	18,000.00	1,881,300.00	0.95	903,600.00	127,844.30	775,755.70	14.15
Roberts, Beth											
Credit Card Processing	1/2/2012	2/20/2012	130,400.00	130,400.00	5,600.00	124,800.00	4.29	0.00	0.00	0.00	0.00
CRM Contact Center	10/3/2011	2/25/2012	70,000.00	18,000.00	19,200.00	-1,200.00	106.67	52,000.00	18,000.00	34,000.00	34.62
CRM Enhancements	11/3/2011	8/26/2012	76,300.00	57,600.00	6,000.00	51,600.00	10.42	18,700.00	19,200.00	-500.00	102.67
Global Order Processing	3/6/2012	8/17/2012	451,080.00	0.00	0.00	0.00	0.00	451,080.00	0.00	451,080.00	0.00
Online Order Catalog	1/2/2012	2/24/2012	239,650.00	239,650.00	68,720.00	170,930.00	28.68	0.00	0.00	0.00	0.00
Online Order Improvements	1/2/2012	9/2/2012	308,000.00	185,000.00	0.00	185,000.00	0.00	123,000.00	0.00	123,000.00	0.00
Online System Enhancements	9/1/2011	8/31/2013	1,115,160.00	835,000.00	0.00	835,000.00	0.00	280,160.00	324,160.00	-44,000.00	115.71
Order Management	9/5/2011	8/24/2012	183,300.00	183,300.00	0.00	183,300.00	0.00	0.00	0.00	0.00	0.00
Order Trending Analysis	2/1/2012	5/22/2012	258,400.00	162,800.00	0.00	162,800.00	0.00	95,600.00	0.00	95,600.00	0.00
Web Application Enhancement	1/2/2012	9/2/2012	232,900.00	143,300.00	0.00	143,300.00	0.00	89,600.00	0.00	89,600.00	0.00
Roberts, Beth Total			3,065,190.00	1,955,050.00	99,520.00	1,855,530.00	5.09	1,110,140.00	361,360.00	748,780.00	32.55
Tanner, Paul											
HR Claims Automation	3/6/2012	12/3/2012	374,380.00	0.00	0.00	0.00	0.00	374,380.00	0.00	374,380.00	0.00
HR Claims Enhancement	2/1/2012	5/22/2012	258,400.00	162,800.00	0.00	162,800.00	0.00	95,600.00	0.00	95,600.00	0.00
PCI Controls Remediation	2/1/2012	8/25/2012	194,000.00	98,400.00	6,000.00	92,400.00	6.10	95,600.00	12,000.00	83,600.00	12.55
Security Compliance	1/2/2012	2/2/2012	844,400.00	844,400.00	0.00	844,400.00	0.00	0.00	0.00	0.00	0.00
Security Enhancements	4/3/2012	12/23/2012	418,400.00	162,800.00	0.00	162,800.00	0.00	255,600.00	0.00	255,600.00	0.00
XPL Translations	3/5/2012	6/22/2012	710,000.00	418,800.00	0.00	418,800.00	0.00	291,200.00	0.00	291,200.00	0.00
Tanner, Paul Total			2,799,580.00	1,687,200.00	6,000.00	1,681,200.00	0.36	1,112,380.00	12,000.00	1,100,380.00	1.08
Grand Total			8,667,670.00	5,541,550.00	123,520.00	5,418,030.00	2.23	3,126,120.00	501,204.30	2,624,915.70	16.03

1.017 Financial Forecast Review by Investment

Type: Crystal Report

Source: Clarity Solution Pack

Query: N/A

This is a Financial Forecast report showing budgets, actuals to date, remaining budget, forecasts for completion, and variance. This report is configurable with three levels of grouping for data sorted as desired.

Financial Forecast Review by Investment (USD)

Investment	Start Date	Finish Date	Budget	Actual To Date	Budget Remaining	% Spent	Forecast (Calculated)	Forecast Remaining	Budget to Forecast Variance	% of Budget
Quinn, Randy										
Client Services Application	2/1/2012	8/31/2012	214,800.00	0.00	214,800.00	0.00	128,400.00	128,400.00	86,400.00	59.78
eCommerce Portal	10/4/2011	10/8/2012	368,300.00	6,000.00	362,300.00	1.63	299,300.00	293,300.00	69,000.00	81.27
Global Expense Application	1/2/2012	12/29/2012	837,000.00	5,250.00	831,750.00	0.63	690,650.00	685,400.00	146,350.00	82.11
Online Customer Release	4/3/2012	8/3/2012	270,400.00	0.00	270,400.00	0.00	270,400.00	270,400.00	0.00	100.00
Online Order Entry	1/2/2012	8/26/2012	600,000.00	62,880.00	537,120.00	10.48	724,880.00	662,000.00	-124,880.00	120.81
Online Orders	12/12/2011	8/27/2012	378,400.00	89,714.30	288,685.70	23.71	318,114.30	228,400.00	60,285.70	84.07
Quinn, Randy Total			2,668,900.00	163,844.30	2,505,055.70	6.14	2,431,744.30	2,267,900.00	237,155.70	91.11
Roberts, Beth										
Credit Card Processing	1/2/2012	3/5/2012	130,400.00	5,600.00	124,800.00	4.29	5,600.00	0.00	124,800.00	4.29
CRM Contact Center	10/3/2011	2/27/2012	105,760.00	45,200.00	60,560.00	42.74	45,200.00	0.00	60,560.00	42.74
CRM Enhancements	11/3/2011	8/26/2012	143,840.00	25,200.00	118,640.00	17.52	25,200.00	0.00	118,640.00	17.52
Global Order Processing	3/6/2012	8/17/2012	434,000.00	0.00	434,000.00	0.00	451,080.00	451,080.00	-17,080.00	103.94
Online Order Catalog	1/2/2012	3/5/2012	189,650.00	68,720.00	120,930.00	36.24	68,720.00	0.00	120,930.00	36.24
Online Order Improvements	1/2/2012	9/2/2012	324,000.00	0.00	324,000.00	0.00	357,500.00	357,500.00	-33,500.00	110.34
Online System Enhancements	9/1/2011	8/31/2013	1,065,160.00	324,160.00	741,000.00	30.43	1,159,160.00	835,000.00	-94,000.00	108.82
Order Management	9/5/2011	8/24/2012	183,300.00	0.00	183,300.00	0.00	183,300.00	183,300.00	0.00	100.00
Order Trending Analysis	2/1/2012	5/22/2012	285,400.00	0.00	285,400.00	0.00	164,160.00	164,160.00	94,240.00	63.53
Web Application Enhancement	1/2/2012	9/2/2012	232,900.00	0.00	232,900.00	0.00	232,900.00	232,900.00	0.00	100.00
Roberts, Beth Total			3,067,410.00	468,880.00	2,598,530.00	15.29	2,692,820.00	2,223,940.00	374,590.00	87.79
Tanner, Paul										
HR Claims Automation	3/6/2012	12/3/2012	374,380.00	0.00	374,380.00	0.00	374,380.00	374,380.00	0.00	100.00
HR Claims Enhancement	2/1/2012	5/22/2012	258,400.00	0.00	258,400.00	0.00	164,160.00	164,160.00	94,240.00	63.53
PCI Controls Remediation	2/1/2012	8/25/2012	660,160.00	33,600.00	626,560.00	5.09	596,560.00	562,960.00	63,600.00	90.37
Security Compliance	1/2/2012	2/2/2012	844,400.00	0.00	844,400.00	0.00	500,000.00	500,000.00	344,400.00	59.21
Security Enhancements	4/3/2012	12/23/2012	418,400.00	0.00	418,400.00	0.00	418,400.00	418,400.00	0.00	100.00
XPL Translations	3/5/2012	6/22/2012	710,000.00	0.00	710,000.00	0.00	628,400.00	628,400.00	81,600.00	88.51
Tanner, Paul Total			3,265,740.00	33,600.00	3,232,140.00	1.03	2,681,900.00	2,648,300.00	583,840.00	82.12
Grand Total			9,002,050.00	666,324.30	8,335,725.70	7.40	7,806,464.30	7,140,140.00	1,195,585.70	86.70

1.018 Financials

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query: System Provider: Portfolio: All Investment Types

The Financials portlet displays financial information about investments included in a portfolio. Use this portlet to view the planned benefit, planned cost, actual cost, planned ROI, planned IRR, and planned payback period of the investments in the portfolio.

Financials

Portfolio Planned NPV

to

Portfolio Planned ROI

to

Power Filter




[Build Power Filter]

Filter

Show All

Save Filter

Clear

Investment	ID▲		Planned Cost	Planned Benefit	Planned ROI	Planned NPV	Planned Break even	Actual Cost	Remaining Cost	Planned IRR	Planned MIRR	Planned Payback Period
Test Idea	brian_test_idea		0.00	0.00					0.00			
Test Project	PPCG-10001		39,315.46	25,000.00	(68%)	(47,288.59)		9,750.00	29,565.46	(26.86%)	(18.52%)	
Project #4	proj_1004		0.00	0.00					0.00			
Aggregation			39,315.46	25,000.00		(47,288.59)			29,565.46			
Comparison			7,000,000.00	75,000.00								
Variance			6,960,684.54	50,000.00								

Highlighted rows = Approved Flag

Currency = USD

Displaying 1 - 3 of 3

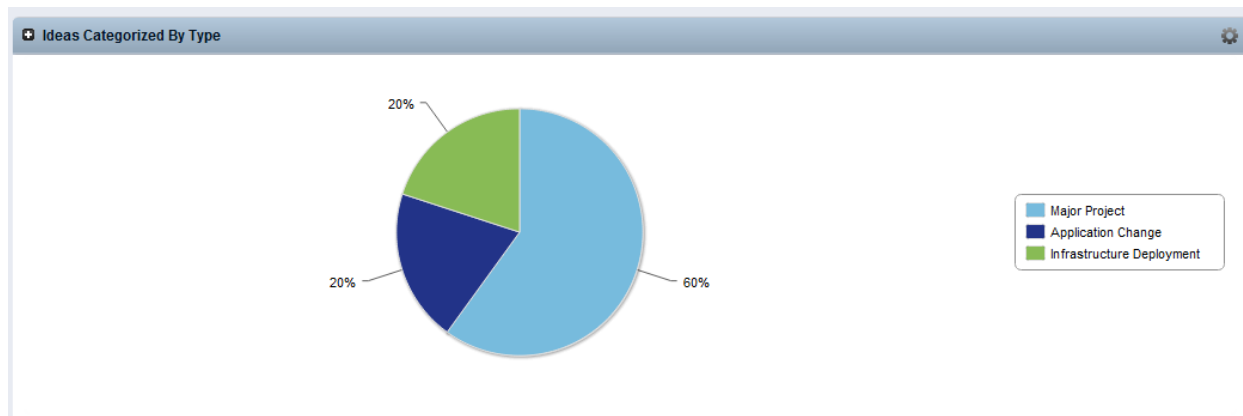
1.019 Ideas Categorized by Type

Type: Chart Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Ideas Categorized by Type

The Ideas Categorized By Type portlet displays the percentage of ideas for idea types (ex: Major Project, Application Change, Infrastructure Deployment) in a pie chart format. Security on Ideas. Displays active Ideas only.



1.020 Incoming Demand

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: System Provider: content.odmd.ideaDP

Incoming Demand

OBS

Status

All

Approved?

All

Type

All

Filter

Show All

Save Filter

Clear

Status	Subject	Start Date	Cost	Resource ETC	Business Alignment▲
Approved	ITM Test Idea	4/10/12	500,000	0	
Approved	New Test Idea	2/14/12	100,000	0	
Approved	Test Idea	2/13/12		16	
Converted	VFB - 2	4/20/12	1,000,000	1,392	
Converted	VFB Demo -1	4/20/12		1,392	
Converted	VFB IDEA APR-20 - 1	4/20/12		1,744	
Unapproved	RH Test Idea	3/12/12		0	
Unapproved	Test Idea	4/17/12		8	
Unapproved	Test Idea 2	3/1/12		0	
Unapproved	Test Idea 3	3/16/12		0	
Total			1,600,000	4,552	

Displaying 1 - 10 of 10

1.021 Investment Baseline vs. Plan by Task

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Report listing variance of baseline estimates vs current plan in hours, listed by project phase, task, and resource.

Investment Baseline vs. Plan by Task (Hours)														
Online Order Entry														
Phase/Task/Resource		Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Planning Phase														
Identify Infrastructure Requirements														
Parker, Ashley	Baseline	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Actual	80.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	80.00
	ETC	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00
	EAC	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sampson, Mike	Baseline	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Actual	64.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	64.00
	ETC	0.00	116.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	116.00
	EAC	64.00	116.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Variance	-116.00	116.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Design Phase														
Functional and Technical Design														
Sampson, Mike	Baseline	32.00	148.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	ETC	0.00	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	EAC	0.00	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Variance	-32.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction Phase														
Database Development														
Sampson, Mike	Baseline	0.00	0.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
	Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	ETC	0.00	0.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
	EAC	0.00	0.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	Baseline	392.00	148.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	730.00
	Actual	144.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	144.00
	ETC	100.00	296.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	586.00
	EAC	244.00	296.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	730.00
	Variance	-148.00	148.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

1.022 Investment Gantt

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query Used: System Provider: Portfolio: All Investment Types

The Investment Gantt portlet displays the schedule, allocation demand, and planned cost for each investment included in a portfolio. Use this portlet to view the list of portfolio investments and compare their schedules.

Investment Gantt

Planned Start to

Planned Cost to

Power Filter [Build Power Filter]

Filter Show All Save Filter Clear

Investment	Approved	Start	Planned Cost	Role Demand	Gantt					
					Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13
Project #4	✓	2/28/12	0							
Test Idea	✓	2/13/12	0	16.00						
Test Project	✓	12/26/11	39,315	9,726.80						
Investment Total			39,315	9,742.80						
Portfolio Comparison			7,000,000	6,248.00						
Variance			6,960,685	(3,494.80)						

Highlighted rows = Approved Flag Currency = USD

Displaying 1 - 3 of 3

1.023 Investment Time and Estimate Review

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

This report displays Assignments, Actuals and ETCs, pending time and any changes to ETC, as well as timesheet entries and status; grouped by project, task and resource. Alternatively, it can be configured to group by resource, then project and task.

Investment Time and Estimate Review

CRM Contact Center

Task Name	Resource Name	Resource Manager	Assignments		Pending		Change in ETC	Timesheet Status	Date Worked	Hours Worked
			Actuals	ETC	Actuals	ETC				
Functional and System Testing	Granger, Paula	Miller, Rosie	168.00	72.00	0.00	0.00	0.00	Posted	12/12/2011	8.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
	Johnson, Eric	Kumar, Arun	168.00	72.00	0.00	0.00	0.00	Posted	12/12/2011	8.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
	Walker, Terry	Miller, Rosie	168.00	72.00	0.00	0.00	0.00	Posted	12/12/2011	8.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
		Total	504.00	216.00	0.00	0.00	0.00			120.00

eCommerce Portal

Task Name	Resource Name	Resource Manager	Assignments		Pending		Change in ETC	Timesheet Status	Date Worked	Hours Worked
			Actuals	ETC	Actuals	ETC				
Complete Project Plan	Goldman, Mark	Kumar, Arun	80.00	0.00	0.00	0.00	0.00	Posted	12/12/2011	4.00
Requirements Definition	Hill, Wayne	Miller, Rosie	156.00	334.00	0.00	0.00	0.00	Posted	12/12/2011	4.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
	Morris, Tom	Miller, Rosie	40.00	320.00	40.00	296.00	16.00	Posted	12/12/2011	4.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
		Total	276.00	654.00	40.00	296.00	16.00			76.00
		Grand Total	780.00	870.00	40.00	296.00	16.00			196.00

1.024 Investment Timesheet Review

Type: Grid Portlet

Source: PMO Accelerator v3.0 (New in v3.0)

Query Used: Investment Timesheet Review

The Investment Timesheet Review portlet displays pending and posted actuals by task, resource, and time period. Use this portlet to compare pending actuals to posted actuals by task and by resource. Security on Investments.

Investment Timesheet Review

Task

Resource

Employment Type

Notes Attached

Timesheet Status

Adjustment

Time Period

Open

Submitted

Returned

Approved

Posted

All




















All

Filter

Show All

Save Filter

Clear

Timesheet	Notes Attached	Investment	Task	Resource	Employment Type	Status	Adjustment	Period Start	Period End	Pending Actuals	Posted Actuals	Total Actuals
		CER Test for ITM A	Test Task 1	Gallinger, Brian	Contractor	Posted		1/2/12	1/8/12	0.00	12.00	12.00
		CER Test for ITM A	Test Task 1	Reynolds, Clayton	Employee	Posted		3/26/12	4/1/12	0.00	7.00	7.00
		CER Test for ITM A	Test Task 1	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		CER Test for ITM A	Task1	Reynolds, Clayton	Employee	Posted		3/26/12	4/1/12	0.00	25.00	25.00
		CER Test for ITM A	Task1	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		CER Test for ITM A	Task2	Reynolds, Clayton	Employee	Posted		3/26/12	4/1/12	0.00	5.00	5.00
		CER Test for ITM A	Task2	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		Holiday	Holiday	Gallinger, Brian	Contractor	Posted		1/23/12	1/29/12	0.00	12.00	12.00
		Holiday	Holiday	Reynolds, Clayton	Employee	Posted		1/23/12	1/29/12	0.00	16.00	16.00
		Holiday	Holiday	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		Jerry Dolak iPad test project	Task1	Gallinger, Brian	Contractor	Posted		1/2/12	1/8/12	0.00	12.00	12.00
		Test For Brian #2	Test For Brian #2	Reynolds, Clayton	Employee	Posted		3/26/12	4/1/12	0.00	5.00	5.00
		Test For Brian #2	Test For Brian #2	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		Test For Brian #2	Define Project	Gallinger, Brian	Contractor	Posted	✓	1/9/12	1/15/12	0.00	0.00	0.00
		Test For Brian #2	Define Project	Reynolds, Clayton	Employee	Posted		3/26/12	4/1/12	0.00	10.00	10.00
		Test For Brian #2	Define Project	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		Test For Brian #2	Build Project	Reynolds, Clayton	Employee	Open		4/9/12	4/15/12	0.00	0.00	0.00
		Test For Brian #2	Build Project	Wuenstel, Brian	Employee	Posted		12/26/11	1/1/12	0.00	20.00	20.00
		Test For Brian #2	Build Project	Wuenstel, Brian	Employee	Posted		2/13/12	2/19/12	0.00	24.00	24.00
		Test For Brian #2	Install Project	Wuenstel, Brian	Employee	Posted		12/26/11	1/1/12	0.00	20.00	20.00
Total										20.00	557.00	577.00

1.025 Investment Timesheet Summary

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Investment Timesheet Summary

The Investment Timesheet Summary portlet displays pending and posted actuals by investment. Use this portlet to compare pending actuals to actuals posted through timesheets. Security on Investments. Excludes Adjusted timesheets and Inactive Investments.

Investment Timesheet Summary

Investment OBS

Investment Manager

Investment Type

All

Investment

Employment Type

All

Timesheet Status

All

Time Period

Filter

Show All

Save Filter

Clear

Investment	Manager	Pending Actuals	Posted Actuals	Total Actuals	Timesheet Details
CER Test for ITM A	Reynolds, Clayton	0.00	49.00	49.00	
Holiday	Administrator, Niku	0.00	28.00	28.00	
Jerry Dolak iPad test project	Dolak, Jerry	0.00	12.00	12.00	
Test For Brian #2	Gallinger, Brian	0.00	95.00	95.00	
Test Project	Gallinger, Brian	20.00	285.00	305.00	
Test Timesheet Rights	Gallinger, Brian	0.00	40.00	40.00	
Testing Financial Plans	Administrator, Niku	0.00	40.00	40.00	
Vacation Time	Administrator, Niku	0.00	8.00	8.00	
VFB - IDEA APR-20 - 1	Reynolds, Clayton	0.00	0.00	0.00	
VFB - 1 - Open WorkBench	Reynolds, Clayton	0.00	0.00	0.00	
VFB - 2		0.00	0.00	0.00	
VFB - 2	Reynolds, Clayton	0.00	0.00	0.00	
VFB Demo -1		0.00	0.00	0.00	
VFB IDEA APR-20 - 1		0.00	0.00	0.00	

1.026 Investments

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: System Provider: Portfolio: All Investment Types

The Investments portlet displays information about investments included in a portfolio. Use this portlet to view the stage, alignment, risk, cost, and role demand of the investments in the portfolio.

Investments

OBS Unit

OBS Unit - Filter Mode

Unit only

Filter

Show All

Save Filter











Clear

Priority to

Planned Cost to

Power Filter

[Build Power Filter]

Investment▲	ID		Priority	Goal	Alignment	Risk	Stage	Planned Start	Planned Cost	Actual Cost	Remaining Cost	Role Demand	Role Actuals	Remaining Role Allocation
Project #4	proj_1004		10	Infrastructure Improvement			<input type="text"/>		0.00		0.00			
Test Idea	brian_test_idea		10				<input type="text"/>		0.00		0.00	16.00		16.00
Test Project	PPCG-10001		10	Grow the Business				12/26/11	39,315.46	9,750.00	29,565.46	9,706.80	242.00	9,464.80
Aggregation									39,315.46	9,750.00	29,565.46	9,722.80	242.00	9,480.80
Comparison									7,000,000.00			6,248.00		
Variance									6,960,684.54			(3,474.80)		

Highlighted rows = Approved Flag Currency = USD

Displaying 1 - 3 of 3

1.027 Issue Management

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Issue Management

The Issue Management portlet displays a list of issues associated to projects you have access to. The portlet has a default filter set to limit the issues to only the issues with a status of “Open” or “Work in Progress”. Security on Investments and Issues. Excludes inactive Investments. Displays Stoplight for Priority and Schedule.

Issue Management

OBS

Project Manager

Project

Priority

Owner

Category

Status

Target Resolution Date

Filter

Show All

Save Filter

Clear

Project	Issue	Description	Priority	Schedule	Target Resolution Date▲	Category	Owner	Email
RH Test Project	RH Test Issue	test	◆	◆	3/13/12	Funding	Hill, Robbin	✉
CER Test for ITM A	ITM Test Issue		◆	◆	4/10/12		Reynolds, Clayton	✉
Ann's Training Project	Issue with autoscheduler	Issue with autoscheduler	◆	◆	8/13/12	Technical	Schmenk, Ann	✉
Test Project	Test Issue		◆	◆	9/28/12	Funding	Gallinger, Brian	✉

Displaying 1 - 4 of 4

1.028 Issues

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Issues

The Issues portlet shows project issues flagged for status reporting from the issues properties page. Security on Investments and Issues. Excludes inactive Investments. Displays stoplight for Priority.

Issues

Project▲	Issue Description	Status	Target Resolution Date	Schedule	Priority	Category	Owner	
RH Test Project	test	Open	3/13/12	◆	◆	Funding	Hill, Robbin	✉
Test Project		Open	9/28/12	◆	◆	Funding	Gallinger, Brian	✉

Displaying 1 - 2 of 2

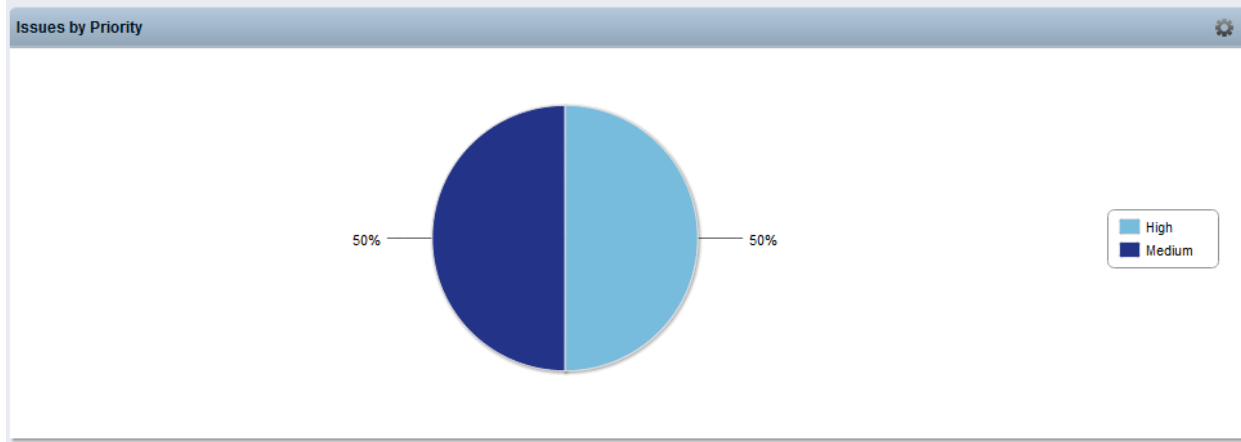
1.029 Issues by Priority

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Issues Listing

The Issues by Priority portlet displays a project-instance-level pie chart grouping issues by priority. Issues with a status of “Resolved” or “Closed” are excluded. Each pie segment reflects the number of issues of that priority, giving a graphical and overall view of the status of a project in terms of issues raised. Security on Investments and Issues. Excludes closed/resolved Issues. Restricted to display on Project.



1.030 Issues Listing

Type: Chart Portlet

Source: PMO Accelerator v3.0 (New in v3.0)

Query Used: Issues Listing

Issues Listing displays details about issues indicating whether the target resolution date of an issue is on track. Security on Investments and Issues. Excludes closed/resolved Issues. Uses stoplights for priority and schedule. Restricted to display on Project.

Issues Listing

Category: All

Owner:

Target Resolution Date: to

Filter

Show All

Save Filter

Clear

Project	Issue	Description	Priority	Schedule	Target Resolution▲	Category	Owner	Email
Test Project	Test issue 2		✖	◆	8/15/12	Funding	Administrator, Niku	✉
Test Project	Test Issue		⚠	◆	9/28/12	Funding	Gallinger, Brian	✉

Displaying 1 - 2 of 2

1.031 Key Performance Indicators

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Key Performance Indicators

The Key Performance Indicators portlet displays indicators such as business alignment, schedule, cost, effort, risk, issue, and change for each investment included in a portfolio. Use this portlet to analyze the ongoing performance of portfolio investments. Does not display closed/resolved Change Requests. Multiple stoplights. Restricted to display on Portfolio.

Key Performance Indicators											
Investment Type: All											
Filter Show All Save Filter Clear											
Investment▲	Manager	Stage	Start	Finish	Schedule %	Days Late	Projected Cost Variance %	Projected Effort Variance %	Risk	Issue	Change
Project #4	Gallinger, Brian		2/28/12	4/29/12	❖	108	❖	❖	❖	❖	
Test Idea	Gallinger, Brian		2/13/12	2/13/12	❖	184	❖	❖	❖	❖	
Test Project	Gallinger, Brian		12/26/11	2/28/13	❖	0	❖	❖	❖	❖	✓
											Displaying 1 - 3 of 3
Highlighted rows = Approved											

1.032 KPIs by Project Type

Type: Xcelsius Dashboard

Source: Clarity Solution Pack

Query Used: KPIs by Project Type

This Dashboard displays graphical comparisons of KPIs by each project type, as well as a count of Issues by severity within each type.



1.033 KPIs by Project Type

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Report displaying high level project information and KPI stoplights, grouped by project type.

KPIs by Project Type

Application Change

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
CRM Enhancements	Reed, Henry	11/3/2011	3/5/2012	🟢	🔴	🟢	🟡	2,280.00	1,496.00
Global Expense Application	McCarthy, John	1/2/2012	2/2/2012	🔴	🔴	🟢	🟢	90.00	35.00
Global Order Processing	Granger, Paula	5/8/2012	8/17/2012	🔴	🟢	🟢	🔴	3,064.00	0.00
HR Claims Enhancement	Sutherland, Joy	2/1/2012	5/22/2012	🔴	🟢	🟢	🟡	1,600.00	0.00
Total								7,034.00	1,531.00

Infrastructure Deployment

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
CRM Contact Center	Reed, Henry	10/3/2011	2/25/2012	🟡	🟡	🟡	🟢	2,960.00	1,904.00
Financial Process Audit	Sutherland, Joy	2/1/2012	5/26/2012	🟡	🟡	🔴	🟡	1,768.00	0.00
PCI Controls Remediation	Reed, Henry	2/1/2012	5/22/2012	🟡	🟢	🟡	🟢	1,160.00	0.00
Security Compliance	Sutherland, Joy	1/2/2012	2/2/2012	🔴	🔴	🟡	🟡	2,220.00	0.00
Total								8,108.00	1,904.00

Major Project

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
Credit Card Processing	Martin, Paul	1/2/2012	2/3/2012	🟡	🔴	🟢	🟢	800.00	32.00
eCommerce Portal	Martin, Paul	10/4/2011	10/8/2012	🟡	🟡	🟢	🟢	4,396.00	664.00
Financial Systems Integration	Tanner, Paul	3/13/2012	7/28/2012	🔴	🟢	🟢	🔴	1,728.00	0.00
HR Claims Automation	Granger, Paula	3/6/2012	12/3/2012	🟡	🟢	🟢	🟡	2,274.00	0.00
Online Customer Release	Sutherland, Joy	4/3/2012	8/3/2012	🟢	🔴	🟢	🟡	2,184.00	0.00
Online Order Catalog	Martin, Paul	1/2/2012	2/24/2012	🟢	🔴	🟢	🔴	2,542.00	240.00
Online Order Entry	McCarthy, John	1/2/2012	4/19/2012	🟡	🔴	🟡	🔴	1,940.00	128.00
Order Management	Reed, Henry	9/5/2011	3/30/2012	🟡	🟡	🟢	🔴	2,052.95	0.00
Web Application Enhancement	Sutherland, Joy	1/2/2012	6/25/2012	🟢	🟡	🟡	🔴	4,384.00	0.00
Total								22,300.95	1,064.00

Grand Total

37,442.95 4,499.00

1.034 Late Tasks and Milestones

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Late Tasks and Milestones

The Late Tasks and Milestones portlet provides a list of late tasks and milestones for a project and includes a Gantt chart. Use this portlet to view a list of tasks that are not completed or late. Security on Projects. Calls DB Functions to calculate estimated finish dates. Stoplights on Days Late and Schedule %.

Late Tasks and Milestones											
Task	Task ID	Finish	Status	Schedule %	Days Late	Gantt Schedule					
						August 2012			September 2012		
						8/6/12	8/13/12	8/20/12	8/27/12	9/3/12	9/10/12
Ann's Training Project	~rmw	2/26/13	Not Started	🔴	375						
Test For Brian #2	~rmw	6/11/12	Started	🔴	73						
Project Kickoff Meeting		8/13/12	Not Started	🔴	178						
Manage Project		4/30/12	Not Started	🔴	31						

Displaying 1 - 4 of 4

1.035 Milestones

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Milestones

The Milestones portlet provides a list of project milestones and schedule indicators within the selected days' outlook, filterable by OBS and Manager. Security on Projects. Calls DB Functions to calculate estimated finish dates. Stoplights for schedule status and Days Late.

Milestones					
OBS <input type="text"/>		As of Date <input type="text"/>			
Manager <input type="text"/>		Days Outlook <input type="text"/>			
<input type="button" value="Filter"/>		<input type="button" value="Show All"/>	<input type="button" value="Save Filter"/>	<input type="button" value="Clear"/>	
	Project	Milestone	Finish▲	Schedule %	Days Late
	Jerry Dolak iPad test project	JD Test Mileston	7/20/12		26
	KP_Project Detail Test Project	Highlight Report Complete	7/26/12		20
	KP_Project Detail Test Project	HSBC Project Dashboard Main Report Complete	8/2/12		13
	KP_Project Detail Test Project	Schedule-Key Tasks Report Complete	8/3/12		12
	KP_Project Detail Test Project	Schedule-Milestones Report Complete	8/9/12		6
	KP_Project Detail Test Project	Schedule-Critical Path Report Complete	8/13/12		2
	KP_Project Detail Test Project	Schedule-All Other Tasks Report Complete	8/16/12		0
	KP_Project Detail Test Project	Schedule-Dependencies Report Complete	8/20/12		0
	KP_Project Detail Test Project	Schedule Report Complete	8/24/12		0
	KP_Project Detail Test Project	August Report Gathering Complete	8/27/12		(3)
					Displaying 1 - 10 of 10

1.036 Milestones

Type: Grid Portlet

Source: PPM Essentials Accelerator

Query Used: Milestones

The Milestones portlet lists the incomplete project milestones, or tasks and how they affect the project schedule. Security on Investments. Stoplight for Schedule and Days Late. Non-Filterable.

Milestones				
Schedule▼	Project	Milestone	Due Date	Days Late
	Jerry Dolak iPad test project	JD Test Mileston	7/20/12	26
	KP_Project Detail Test Project	Highlight Report Complete	7/26/12	20
	KP_Project Detail Test Project	HSBC Project Dashboard Main Report Complete	8/2/12	13
	KP_Project Detail Test Project	Schedule-Key Tasks Report Complete	8/3/12	12
	KP_Project Detail Test Project	Schedule-Milestones Report Complete	8/9/12	6
	KP_Project Detail Test Project	Schedule-Critical Path Report Complete	8/13/12	2
	KP_Project Detail Test Project	Schedule-All Other Tasks Report Complete	8/16/12	(1)
	KP_Project Detail Test Project	Schedule-Dependencies Report Complete	8/20/12	(5)
	KP_Project Detail Test Project	Schedule Report Complete	8/24/12	(9)
	KP_Project Detail Test Project	August Report Gathering Complete	8/30/12	(15)
				Displaying 1 - 10 of 10

1.037 My Portfolios

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Portfolio Listing

The My Portfolios portlet lists portfolios you have rights to view and their cost performance indicators. Security on Portfolios. Displays active only. Cost Variance indicator of green/red for under/over.

My Portfolios					
Parent Portfolio		Portfolio(s)			
Filter		Show All			
Save Filter		Clear			
Cost Variance Indicator	Portfolio▲	Portfolio Planned Cost	Investments Planned Cost	Cost Variance	Portfolio Planned Benefit
◆	Brian G Test Portfolio	250,000	250,000	0	750,000
◆	Brian Portfolio	7,000,000	39,315	6,960,685	75,000
◆	JD Child Portfolio	100	250,000	(249,900)	300
◆	JD Parent Portfolio - ALL Invest	7,000,000	0	7,000,000	10,000,000
◆	Jerry Portfolio	1,000,000	289,315	710,685	2,000,000
◆	VFB - Training Portfolio	0	289,315	(289,315)	0
Total		15,250,100	1,117,946	14,132,154	12,825,300

1.038 Pending Estimates

Type: Grid Portlet

Source: PPM Essentials Accelerator

Query Used: Pending Estimates

This portlet displays changed and pending estimates to task durations made by resources. Security on Investments and Timesheets. Restricts by timesheet status and open time periods only. Shows green/red for decrease/increase in estimated ETCs on task.

Pending Estimates									
Project Manager		Resource							
Project		Resource Type							
Filter		Show All							
Save Filter		Clear							
Project▲	Task	Resource	Start	Finish	Pending ETC	Plan ETC	Pending Actuals	Adjusted Plan ETC	Recommended Change in ETC
◆ Test Timesheet Rights	Test Timesheet Rights	Gallinger, Josie	2/27/12	4/30/12	220	328	40	288	(68)
Total					220	328	40	288	(68)

1.039 Pending Estimates Review

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)
Query Used: Pending Estimates

The Pending Estimates Review portlet displays pending estimates and recommended changes by project, task and resource. Use this portlet to compare pending estimates to planned estimates by task and by resource. Security on Investments. Does not limit by timesheet status or timeperiod. Shows green/red for decrease/increase in estimated ETCs on task.

Pending Estimates Review

Project OBS

Project Manager

Project

Employment Type

All

Resource

Filter

Show All

Save Filter

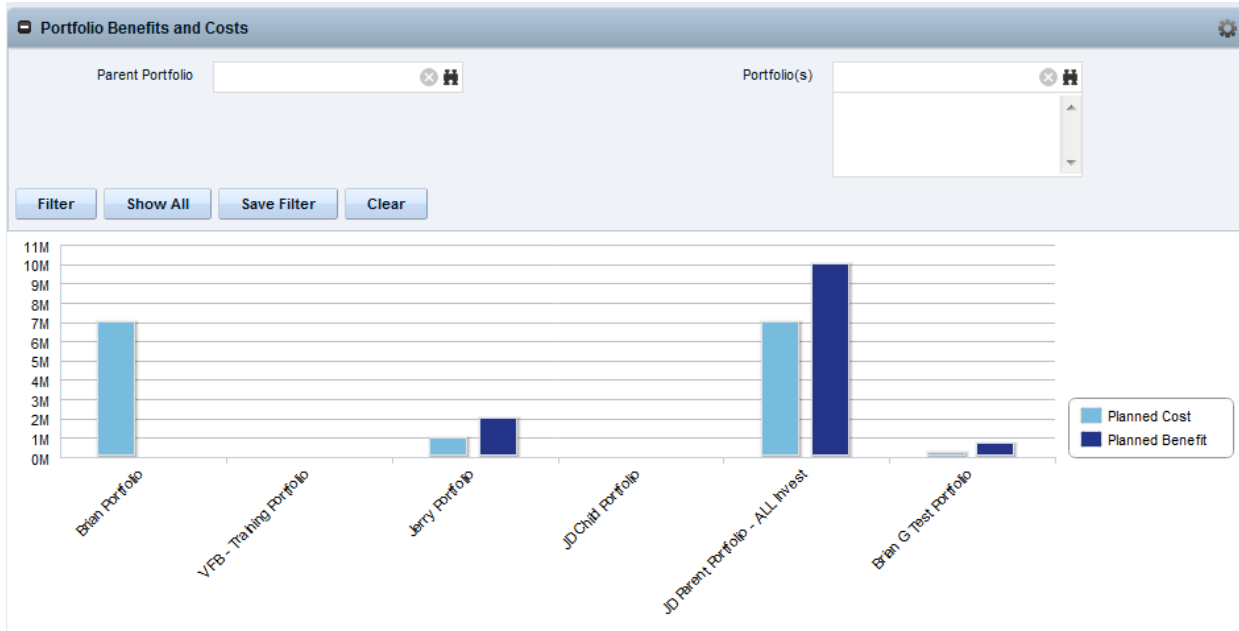
Clear

Project▲	Task	Resource	Start	Finish	Pending ETC	Plan ETC	Pending Actuals	Adjusted Plan ETC	Recommended Change in ETC	Increase/Decrease in ETC
Test Timesheet Rights	Test Timesheet Rights	Gallinger, Josie	2/27/12	4/30/12	220.00	328.00	40.00	288.00	(68.00)	◆
Total					220.00	328.00	40.00	288.00	(68.00)	

1.040 Portfolio Benefits and Costs

Type: Chart Portlet
Source: PMO Accelerator v3.0 (Enh. in v3.0)
Query Used: Portfolio Benefits and Costs

The Portfolio Benefits and Costs portlet displays a column graph showing the total planned benefit and cost of each portfolio. Security on Portfolios. Displays active portfolios only.



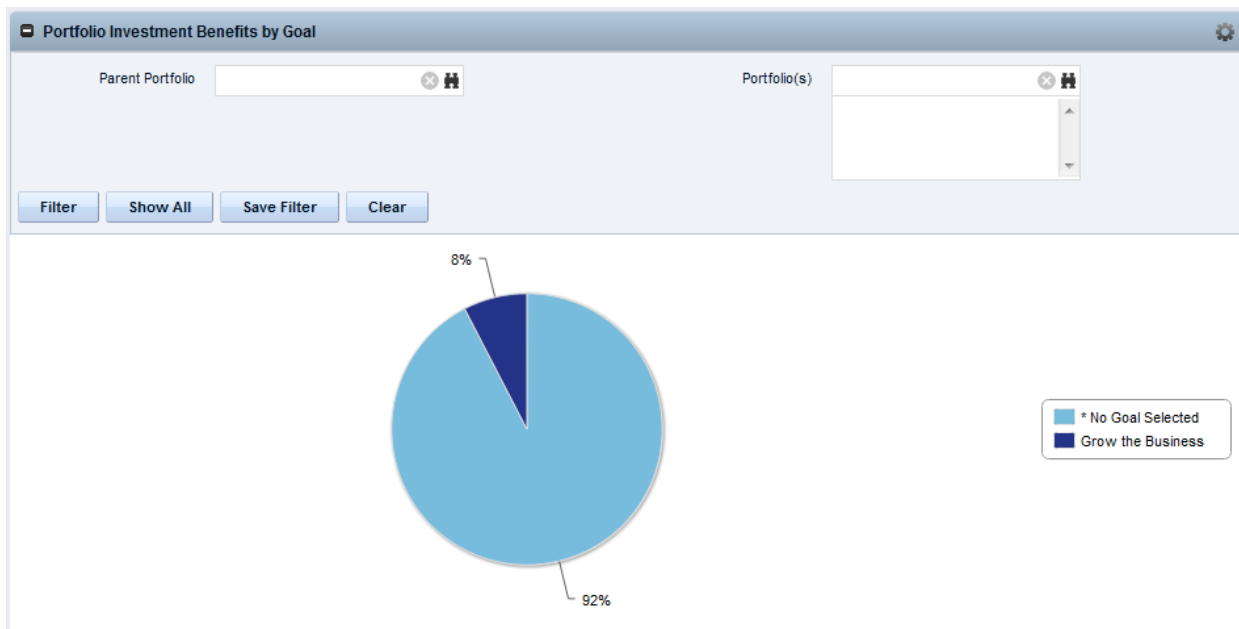
1.041 Portfolio Benefits by Goal

Type: Chart Portlet

Source: PMO Accelerator v3.0

Query Used: Portfolio Benefits by Goal

The Portfolio Investment Benefits by Goal portlet displays a pie graph showing the proportion of the portfolio investment planned benefit per corporate goal. Each pie segment represents a corporate goal to which at least one investment in the portfolio is mapped. Security on Portfolios and Contents. Displays active investments only.



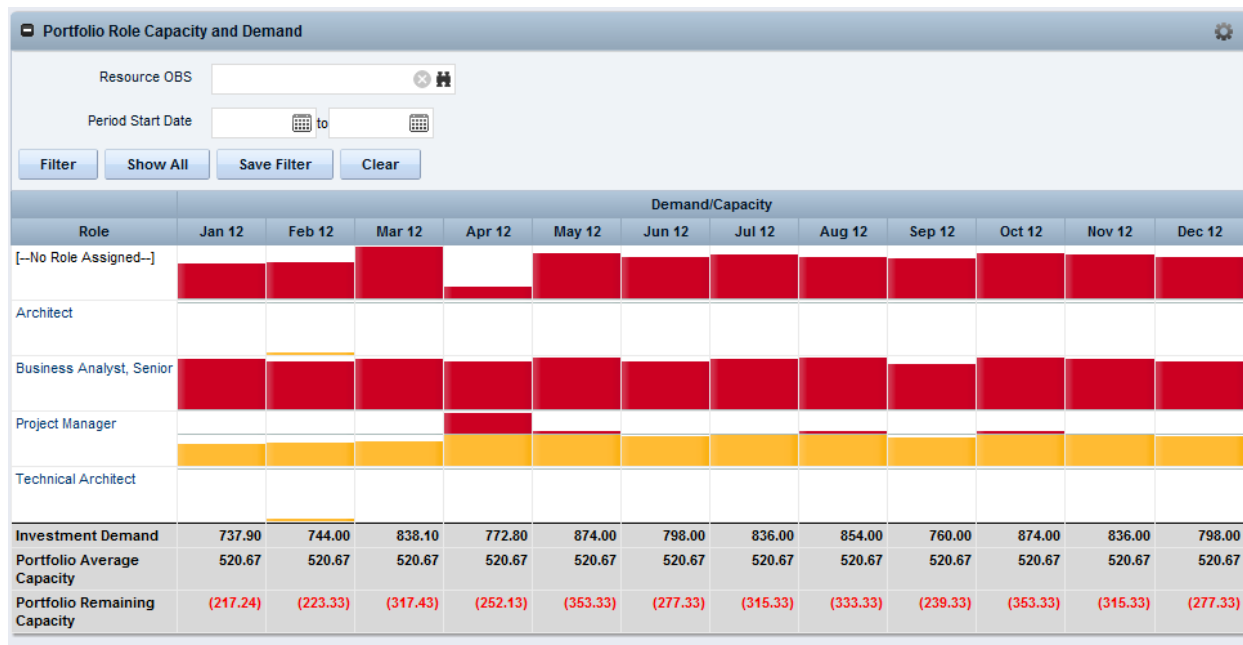
1.042 Portfolio Role Capacity and Demand

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v13)

Query Used: Role Capacity and Demand

The Portfolio Role Capacity and Demand portlet displays a histogram by month. The histogram displays the resource and role allocation demand, grouped by investment role, for the portfolio investments and the portfolio role capacity threshold on a monthly basis. Security on Resources. Uses Admin user capacity as baseline. Does not include non-labor resources. Resource project role must match roles in Portfolio to appear in results. Flags yellow/red for allocation under/over capacity.



1.043 Posted Transaction Review *

Type: Grid Portlet

Source: PMO Accelerator v3.0 (New in v3.0)

Query Used: Transaction Review

The Posted Transaction Review portlet displays financial transactions across investments by transaction date and includes quantity, cost, and currency information. Security on Investments. Only successfully posted transactions appear.

1.044 Posted Transaction Review [Investment level] *

Type: Grid Portlet

Source: PMO Accelerator v3.0 (New in v3.0)

Query Used: Transaction Review

The Posted Transactions Review portlet at the investment level displays financial transactions for an investment by transaction date and includes quantity, cost, and currency information. Security on Investments. Only successfully posted transactions appear.

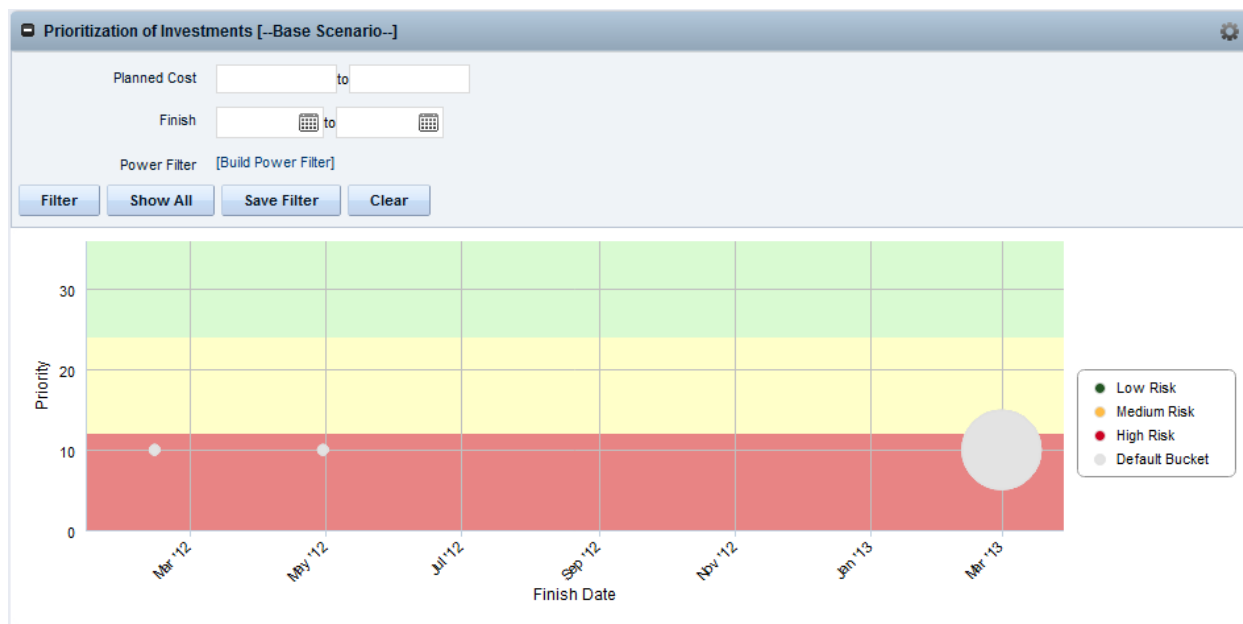
1.045 Prioritization of Investments

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in v13)

Query Used: System Provider: Portfolio: All Investment Types

The Prioritization of Investments portlet is a bubble graph that displays how the planned cost and risk of investments balance between their priority and finish dates. Each bubble on the graph represents an investment and the size of the bubble is determined by the planned cost of the investment. Portlet comes in two forms, “Base Scenario” and “Compare to Scenario” so you can see before/after effects of proposed changes to the Portfolio during ‘What if’ analysis. Displays on Portfolio.



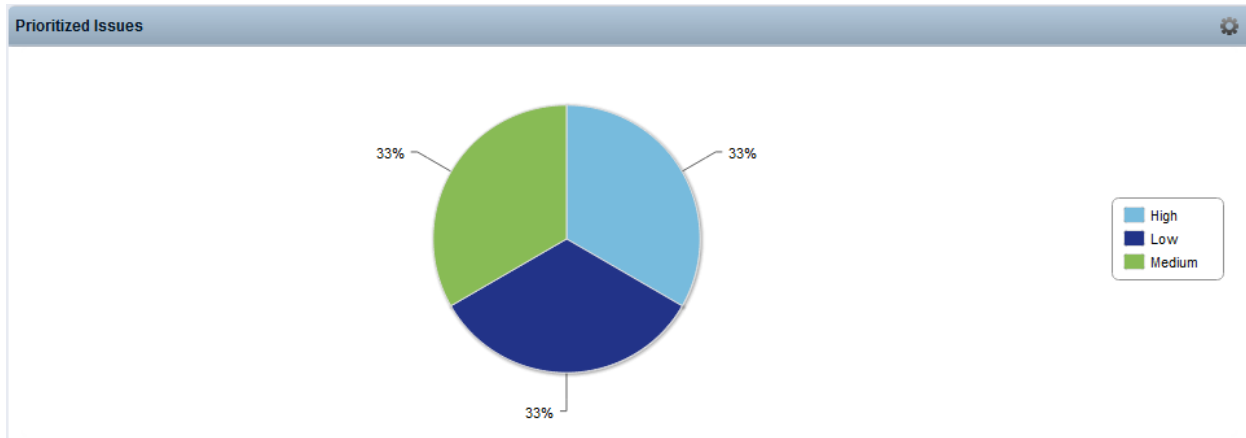
1.046 Prioritized Issues

Type: Chart Portlet

Source: PPM Essentials Accelerator

Query Used: Prioritized Issues

The Prioritized Issues portlet gives you a high-level, non-filterable view of the current issues on projects and alerts you for large number of issues. Security on Projects and Issues. Displays non-closed issues from active projects only.



1.047 Prioritized Issues Listing **

Type: Grid Portlet

Source: PPM Essentials Accelerator

Query Used: Prioritized Issues Listing

The Prioritized Issues Listing portlet gives you a detailed, drill-down view of the current issues assigned the selected priority. Security on Projects and Issues.

1.048 Process Bottlenecks *

Type: Grid Portlet

Source: PMO Accelerator v3.0

Query Used: Process Bottlenecks

The Process Bottlenecks portlet displays initiated processes and indicates how long an assigned resource took to respond to each process milestone step. Use this portlet to analyze if an action is taking longer than the required time and to reevaluate internal processes.

1.049 Program Manager Cost Dashboard

Type: Grid Portlet

Source: PMO Accelerator v3.0

Query Used: Program Manager Cost Dashboard

The Program Manager Cost Dashboard portlet displays cost and effort performance of projects belonging to a program. This portlet compares a program budget to the cost performance of its projects. Security on Project. Utilizes calculations from pdf_project_v2. Displays Stoplights on Cost variance %.

Program Manager Cost Dashboard												
Program Brian's Program												
Filter Save Filter Clear												
	Project▲	Risk	Stage	Finish	Planned ROI	Planned IRR	BAC Cost	Actual Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %	Cost Drill Down
	CER Test for ITM A		Define	5/25/12	(100.00%)	0.00%	7,950	937	3,744,412	3,736,462		
	Jerry Dolak iPad test project			7/20/12	(100.00%)	0.00%	0	0	0	0		
	Test For Brian #2		Define	6/11/12	(100.00%)	0.00%	5,705,436	188,325	376,455	(5,328,981)		
	Test Project		Initiation	2/28/13	(67.62%)	(26.86%)	144,407	3,632	3,632	(140,775)		
Project					(91.91%)	(6.71%)	5,857,793	192,894	4,124,499	(1,733,294)		
Program									0			
Variance									(4,124,499)			

= Required

1.050 Program Manager Schedule Dashboard

Type: Grid Portlet

Source: PMO Accelerator v3.0

Query Used: Program Manager Schedule Dashboard

The Program Manager Schedule Dashboard portlet displays schedule performance of a program and projects belonging to the program. Security on Project. Displays active investments only.

Program Manager Schedule Dashboard

Program

Brian's Program

Filter

Save Filter

Clear

Program/Project	Start	Finish	Overall Status	Schedule %	Days Late	Gantt Schedule					
						Q3 2012			Q4 2012		
						Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12
Brian's Program	12/26/11	2/28/13			0						
CER Test for ITM A	1/3/12	5/25/12			2						
Jerry Dolak iPad test project	1/3/12	7/20/12			26						
Test For Brian #2	12/26/11	6/11/12			72						
Test Project	12/26/11	2/28/13			0						

= Required

Displaying 1 - 5 of 5

1.051 Project Allocations by Employment Type

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Displays all project allocations by Employment type.

Project Allocations by Employment Type (Hours)									
Contractor									
Project Name	Project ID	Project Manager	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Total
Client Services Application	PR1005	Thompson, Peter	352.00	336.00	368.00	336.00	352.00	368.00	2,112.00
eCommerce Portal	PR1002	Martin, Paul	204.00	0.00	0.00	0.00	0.00	86.00	290.00
Global Expense Application	PR1025	McCarthy, John	176.00	168.00	184.00	168.00	176.00	184.00	1,056.00
Global Order Processing	PR1034	Tanner, Paul	532.00	568.00	176.00	256.00	304.00	88.00	1,924.00
Online Order Catalog	PR1008	Martin, Paul	176.00	168.00	184.00	168.00	176.00	184.00	1,056.00
Online Order Entry	PR1007	McCarthy, John	190.00	136.00	274.00	258.00	266.00	234.00	1,358.00
Online Orders	PR1006	Thompson, Peter	160.00	48.00	248.00	206.00	240.00	216.00	1,118.00
Online System Enhancements	PR1038	Granger, Paula	238.00	792.00	612.00	722.00	760.00	918.00	4,042.00
Order Management	PR1010	Tanner, Paul	88.00	40.00	16.00	36.00	36.00	180.00	396.00
Web Application Enhancement	PR1004	Sutherland, Joy	128.00	248.00	304.00	56.00	72.00	38.00	846.00
Total			2,244.00	2,504.00	2,366.00	2,206.00	2,382.00	2,496.00	14,198.00
Employee									
Project Name	Project ID	Project Manager	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Total
Client Services Application	PR1005	Thompson, Peter	1,056.00	1,008.00	1,104.00	1,008.00	1,056.00	1,104.00	6,336.00
eCommerce Portal	PR1002	Martin, Paul	236.00	278.00	414.00	378.00	328.00	206.00	1,840.00
Global Expense Application	PR1025	McCarthy, John	440.00	420.00	460.00	420.00	440.00	460.00	2,640.00
Global Order Processing	PR1034	Tanner, Paul	380.00	400.00	440.00	336.00	352.00	216.00	2,124.00
Online Order Catalog	PR1008	Martin, Paul	1,056.00	1,008.00	1,104.00	1,008.00	1,056.00	1,104.00	6,336.00
Online Order Entry	PR1007	McCarthy, John	350.00	292.00	488.00	456.00	472.00	408.00	2,466.00
Online Orders	PR1006	Thompson, Peter	296.00	240.00	128.00	152.00	128.00	128.00	1,072.00
Online System Enhancements	PR1038	Granger, Paula	204.00	288.00	204.00	304.00	480.00	476.00	1,956.00
Web Application Enhancement	PR1004	Sutherland, Joy	360.00	40.00	184.00	272.00	144.00	76.00	1,076.00
Total			4,378.00	3,974.00	4,526.00	4,334.00	4,456.00	4,178.00	25,846.00
Grand Total			6,622.00	6,478.00	6,892.00	6,540.00	6,838.00	6,674.00	40,044.00

1.052 Project Analysis

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Project Analysis

The Project Analysis portlet provides program managers with a view into the projects and tasks that are part of the program. Use this portlet to analyze the schedule of ongoing projects in the program. Security on Investment. Displays on Program. Displays stoplights for Schedule, Status Indicator, Business Alignment, and Status Report Overall Status.

Project Analysis

Project

Project Manager

Filter

Show All

Save Filter

Clear

Project/Task	Team	Project Manager	Stage	Start	Finish	Overall Status	Schedule %	Days Late	Gantt Schedule					
									Jul 12	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12
CER Test for ITM A		Reynolds, Clayton	Define	1/3/12	5/25/12			2						
Jerry Dolak iPad test project		Dolak, Jerry		1/3/12	7/20/12			26	<div></div>					
Test For Brian #2		Gallinger, Brian	Define	12/26/11	6/11/12			72						
Test Project		Administrator, Niku	Initiation	12/26/11	2/28/13			0	<div></div>					

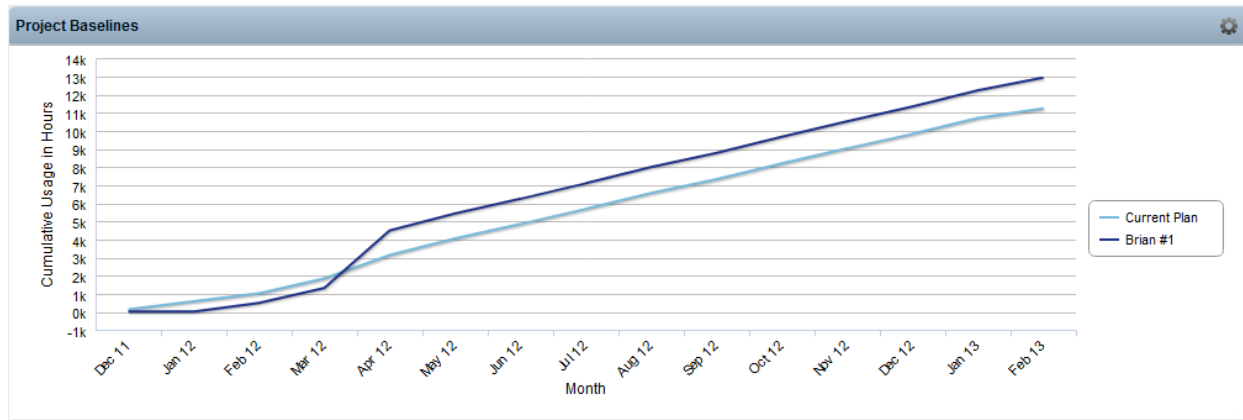
1.053 Project Baselines

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Project Baselines

The Project Baselines portlet displays a line graph that charts the baseline activity against the usage or hours worked on the project. Security on Project. Pulls effort from prj_blb_slices



1.054 Project Cost and Effort

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Project WBS Hierarchy

The Project Cost and Effort portlet shows Baselined estimates against actual costs and actual hours of efforts. Security on Project. Union of 3 queries to acquire Project/Task/Resource data. Displays stoplights for schedule, cost and hours variance.

Project Cost and Effort

OBS

Project Manager

Project Type

All

Status

All

Project

Filter

Show All

Save Filter

Clear

Project / WBS / Resource	Cost	Baseline Cost	Actual Cost	EAC	Cost Variance	Effort	Baseline Hours	Actual Hours	Total Effort	Hours Variance
Ann's Training Project		0	0	0	0		8	0	8,896	(8,888)
Another project		0	0	0	0		0	0	8	(8)
CER Test for ITM A		3,744,112	3,675	3,747,150	(3,038)		1,102	49	1,106	(4)
Chris Test		0	0	0	0		0	0	8	(8)
Chris_Test_2		0	0	0	0		0	0	8	(8)
Cooper Master 1		0	0	0	0		0	0	9,840	(9,840)
Cooper Sub 1		0	0	0	0		0	0	7,912	(7,912)
Cooper Sub 2		0	0	0	0		0	0	1,136	(1,136)
Dan Teitsma Test Project		0	0	0	0		0	0	0	0
Demo Project 2		0	0	0	0		0	0	3,496	(3,496)
Demonstration Project		0	0	0	0		0	0	0	0
Doug's Move		0	0	0	0		0	0	18	(18)
Jerry Dolak iPad test project		0	900	4,723,400	(4,723,400)		0	12	1,252	(1,252)
KP_Project Detail Test Project		0	0	0	0		453	0	433	20
My Test Project		0	0	0	0		0	0	0	0
Project #4		0	0	0	0		0	0	0	0
RH Test Project		0	0	0	0		0	0	129	(129)
Ron Test Proj 2 (MSP)		0	0	0	0		0	0	0	0
Sample 7712345		0	0	0	0		0	0	399	(399)
Test For Brian #2		2,461,516	5,600	229,548	2,231,968		2,000.48	96	3,633	(1,633)
Totals		9,099,733	193,225	29,761,797	(20,662,064)		29,502.28	983	71,737	(42,235)

1

2

1.055 Project Cost and Effort

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

This report displays cost and effort, breaking down Actuals, EAC, Variance, BAC, and health stoplights, configurable for display at Project, phase, task or assignment level

Project Cost and Effort

Project/WBS/Resource	BAC Cost	Actual Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %	BAC	Actuals	EAC	Projected Effort Variance	Project Effort Variance
eCommerce Portal	646,000.00	106,600.00	664,100.00	18,100.00	◆	3,992.00	664.00	4,112.00	120.00	◆
Planning Phase	77,200.00	77,200.00	77,200.00	0.00	◆	468.00	468.00	468.00	0.00	◆
Define Scope Change Process	1,600.00	1,600.00	1,600.00	0.00	◆	8.00	8.00	8.00	0.00	◆
Travel Expense	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Define Resource Plan	16,000.00	16,000.00	16,000.00	0.00	◆	80.00	80.00	80.00	0.00	◆
Risk Response and Mitigation Plan	27,000.00	27,000.00	27,000.00	0.00	◆	180.00	180.00	180.00	0.00	◆
Identify Storage Requirements	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Identify Infrastructure Requirements	6,600.00	6,600.00	6,600.00	0.00	◆	40.00	40.00	40.00	0.00	◆
Complete Project Plan	26,000.00	26,000.00	26,000.00	0.00	◆	160.00	160.00	160.00	0.00	◆
Planning Phase Gate Complete	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Design Phase	362,500.00	29,400.00	374,300.00	11,800.00	◆	2,114.00	196.00	2,194.00	80.00	◆
Requirements Definition	286,000.00	29,400.00	297,800.00	11,800.00	◆	1,884.00	196.00	1,964.00	80.00	◆
Functional and Technical Design	36,500.00	0.00	36,500.00	0.00	◆	230.00	0.00	230.00	0.00	◆
Hardware Acquisition	40,000.00	0.00	40,000.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Design Phase Gate Complete	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Construction Phase	127,300.00	0.00	133,600.00	6,300.00	◆	910.00	0.00	950.00	40.00	◆
Database Development	12,000.00	0.00	12,000.00	0.00	◆	80.00	0.00	80.00	0.00	◆
User Interface Development	6,000.00	0.00	6,000.00	0.00	◆	40.00	0.00	40.00	0.00	◆
Unit and Performance Testing	109,300.00	0.00	115,600.00	6,300.00	◆	790.00	0.00	830.00	40.00	◆
Construction Phase Gate Complete	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Deployment and Quality Phase	65,000.00	0.00	65,000.00	0.00	◆	420.00	0.00	420.00	0.00	◆
Functional and System Testing	17,000.00	0.00	17,000.00	0.00	◆	120.00	0.00	120.00	0.00	◆
Usability and User Acceptance Testing	14,000.00	0.00	14,000.00	0.00	◆	80.00	0.00	80.00	0.00	◆
User Training Plan	8,400.00	0.00	8,400.00	0.00	◆	60.00	0.00	60.00	0.00	◆
Train the Trainer Classes	13,600.00	0.00	13,600.00	0.00	◆	80.00	0.00	80.00	0.00	◆
Trainer Certification and User Validation	12,000.00	0.00	12,000.00	0.00	◆	80.00	0.00	80.00	0.00	◆
Deployment Phase Gate Complete	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆
Closing Phase	14,000.00	0.00	14,000.00	0.00	◆	80.00	0.00	80.00	0.00	◆
Lessons Learned	14,000.00	0.00	14,000.00	0.00	◆	80.00	0.00	80.00	0.00	◆
Closing Phase Gate Complete	0.00	0.00	0.00	0.00	◆	0.00	0.00	0.00	0.00	◆

1.056 Project Cost by Phase *

Type: Grid Portlet

Source: PMO Accelerator v3.0

Query Used: Project Costs by Phase

The Project Costs by Phase drill-down portlet displays cost performance amounts and variances by phase. Use the portlet to identify the phases of the project plan that are over baseline from a cost standpoint. Security on Project. Data obtained from odf_task_v2. Requires use of templates included in Accelerator pack as it leverages phase_sequence and other attributes in the db view: COP_PHASE_ROLLUP_V.

1.057 Project Cost by Resource *

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Project Costs by Resource

The Project Costs by Resource drill-down portlet displays cost performance amounts and variances by resource. Use the portlet to identify the resources that are over baseline from a cost standpoint. Security on Project. Data

obtained from odf_assignment_v2 and nbi_proj_res_rates_and_costs. Displays stoplights for Projected Cost and Projected Effort variance values.

1.058 Project Cost by Task *

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Project Costs by Task

The Project Costs by Task drill-down portlet displays cost performance amounts and variances by task. You can use the portlet to identify tasks of the project plan that are over baseline from a cost standpoint. Security on Project. Data obtained from odf_task_v2. Displays stoplights for Projected Cost and Projected Effort variance values.

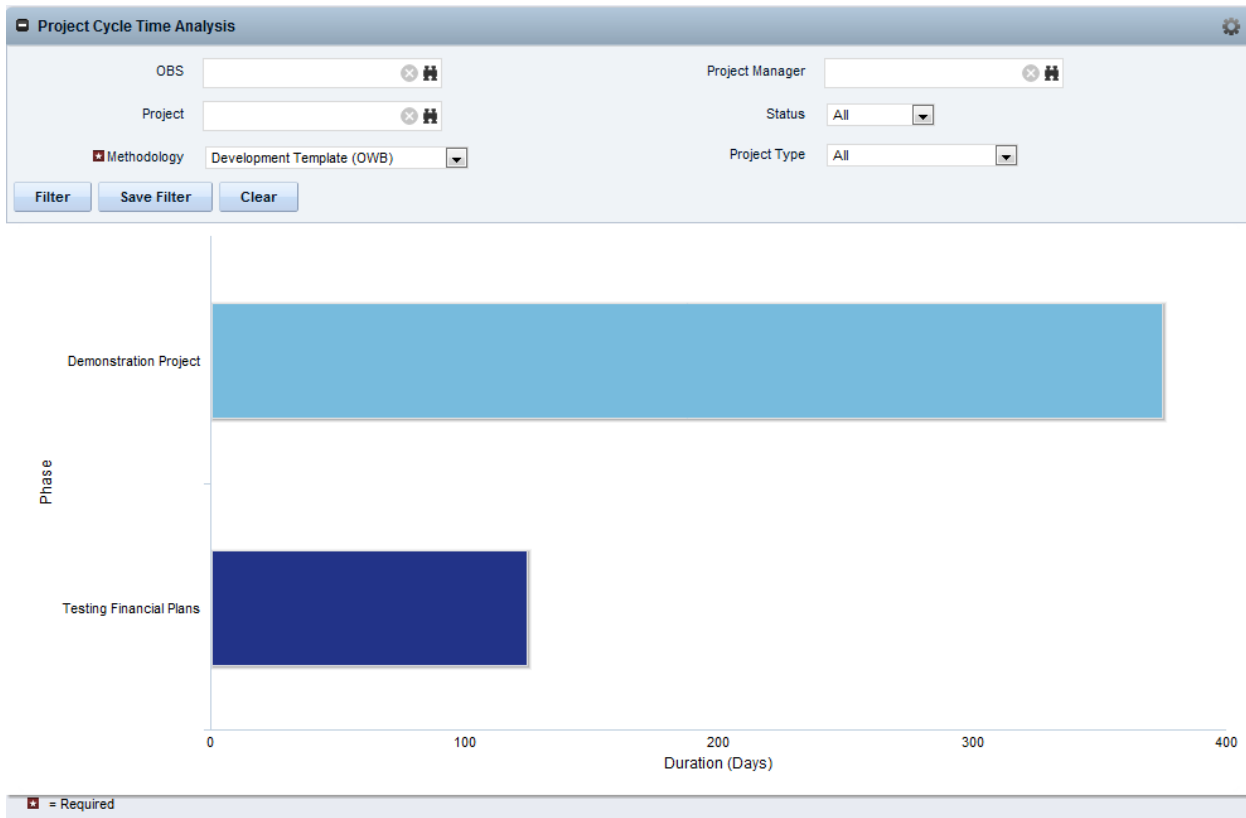
1.059 Project Cycle Time Analysis

Type: Chart Portlet

Source: PMO Accelerator v3.0

Query Used: Project Cycle Time Analysis

The Project Cycle Time Analysis portlet displays the number of days spent in each project phase illustrated as a bar graph. Use this portlet to compare time spent in each phase for projects based on the same methodology. The project templates installed with the PMO Accelerator add-in are considered project methodologies and must be the basis of projects you wish to analyze with this portlet. Security on Project. Excludes templates and inactive projects.



1.060 Project Deliverables Review *

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Project Deliverables Review

The Project Deliverables Review portlet is used to review project documentation, such as architectural designs, planning documents, scope of work, and quality assurance plans. Security on Project. Excludes templates and inactive projects. Displays stoplights for File Status and File Review Schedule.

1.061 Project Indicators

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Project Indicators

The Project Indicators portlet displays key performance indicators (KPIs) for the project. The portlet provides a quick update on KPIs, such as stage, schedule %, days late, projected cost variance %, projected effort variance %, risk, issues and change requests. Security on Project. Displays on Project. Displays stoplights for Schedule,

Projected Cost and Projected Effort variance, degree of Issues on project, and flags if there are Change Requests open on project.

Project Indicators							
Stage	Schedule %	Days Late	Projected Cost Variance %	Projected Effort Variance %	Risk	Issue	Change
	◆	0	◆	◆	◆	◆	✓
Displaying 1 - 1 of 1							

1.062 Project KPIs by OBS

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Project KPIs by OBS

The Project KPIs by OBS portlet displays key performance indicators (KPIs) for projects organized by OBS. The portlet provides a quick update on KPIs, such as business alignment, schedule %, days late, projected cost and effort variance %, risk, issues, and change requests. Security on Project. Union of 4 queries. Displays stoplights on Business Alignment, Schedule, Project Effort and Projected Cost Variance, and Risks/Issues, and flags for outstanding Change Requests. OBS Filter value required.

Project KPIs by OBS									
OBS		Department: Consultant		Project Manager					
Business Owner									
Filter		Save Filter		Clear					
OBS / Project	Manager	Business Alignment	Schedule %	Days Late	Projected Cost Variance %	Projected Effort Variance %	Risk	Issue	Change
Consultant		◆	◆	63	◆	◆	◆	◆	✓
CER Test for ITM A	Reynolds, Clayton	◆	◆	2	◆	◆	◆	◆	✓
KP_Project Detail Test Project	Parikh, Keshia	◆	◆	(3)	◆	◆	◆	◆	
Test Project	Administrator, Niku	◆	◆	190	◆	◆	◆	◆	
◆ = Required									

1.063 Project KPIs by OBS

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Project KPIs by OBS

The Project KPIs By OBS portlet displays projects sorted by OBS (all OBS types containing project object) and provides a quick update on key performance indicators (KPIs), such as schedule, status, effort, cost, risk, issues, and change requests. Security on Project. Union of 4 queries to obtain avg values of outstanding risks, issues, changes, dates, etc. Displays stoplights for Status, Schedule, Effort, Cost, Risk/Issue, and flags for outstanding Change Requests.

Project KPIs By OBS							
OBS <input type="text"/>		Project Manager <input type="text"/>					
Project Type <input type="text" value="All"/>							
Status <input type="text" value="All"/>							
<input type="button" value="Filter"/>		<input type="button" value="Show All"/>	<input type="button" value="Save Filter"/>		<input type="button" value="Clear"/>		
OBS / Project▲	Status	Schedule	Effort	Cost	Risk	Issues	Change
All Employees	⬆	⬇	⬇	⬇	⬆	⬆	✓
All Lines of Business	⬆	⬇	⬇	⬇	⬆	⬆	✓
Consultant	⬆	⬇	⬆	⬆	⬆	⬆	✓
Executive	⬆	⬇	⬆	⬆	⬆	⬆	
Technical	⬆	⬇	⬇	⬇	⬆	⬆	✓

1.064 Project Lifecycle Review

Type: Grid Portlet

Source: PMO Accelerator v3.0

Query Used: Project Lifecycle Review

The Project Lifecycle Review portlet displays the schedule status of each project phase. Use this portlet for a phase schedule overview of projects based on the same project methodology. The project templates installed with the PMO Accelerator add-in are considered project methodologies and must be the basis of projects you wish to analyze with this portlet. Security on Project. Displays stoplights on Schedule, Phase Status, and Business Alignment.

Project Lifecycle Review

OBS

Project

Methodology

Major IT Project Template

Filter

Save Filter

Clear

Project Manager

Status

All

Project Type

All

Schedule %											
Project▲	Project Manager	Stage	Start	Finish	Initiation Phase	Planning Phase	Design Phase	Construction Phase	Deployment and Quality Phase	Closing Phase	
RH Test Project	Administrator, Niku		1/2/12	3/12/12							
= Required											

1.065 Project Manager Cost and Effort Dashboard

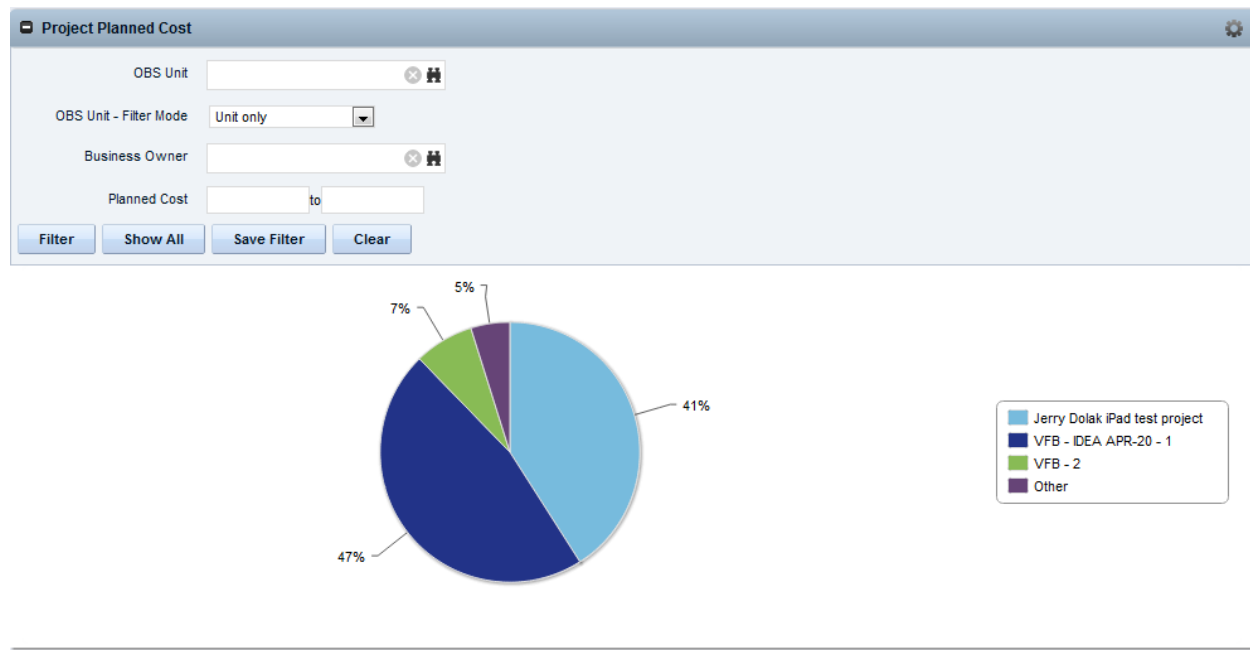
Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Project Manager Schedule Dashboard

The Project Manager Cost and Effort Dashboard displays project cost and effort performance amounts and variances. You can filter the results by the projects you manage or list all projects you have access to, including subprojects. Security on Project and calls "@NVL@(SecCheck.HasRights, 0) HasRights" for internal use. Displays stoplights on Schedule, Projected Cost and Projected Effort Variance. Also displays icons for Dashboard and Subprojects.

The Project Planned Cost portlet displays a pie chart that shows the percentage amount of the planned cost for each project. Each pie slice corresponds to a project. Click a pie slice to go to the project dashboard.



1.068 Project Review

Type: Chart Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Governance Project Review

The Project Review portlet displays approved and unapproved projects and their schedule status. Security on Project. Displays stoplights for Days Late and Approval Status indicator.



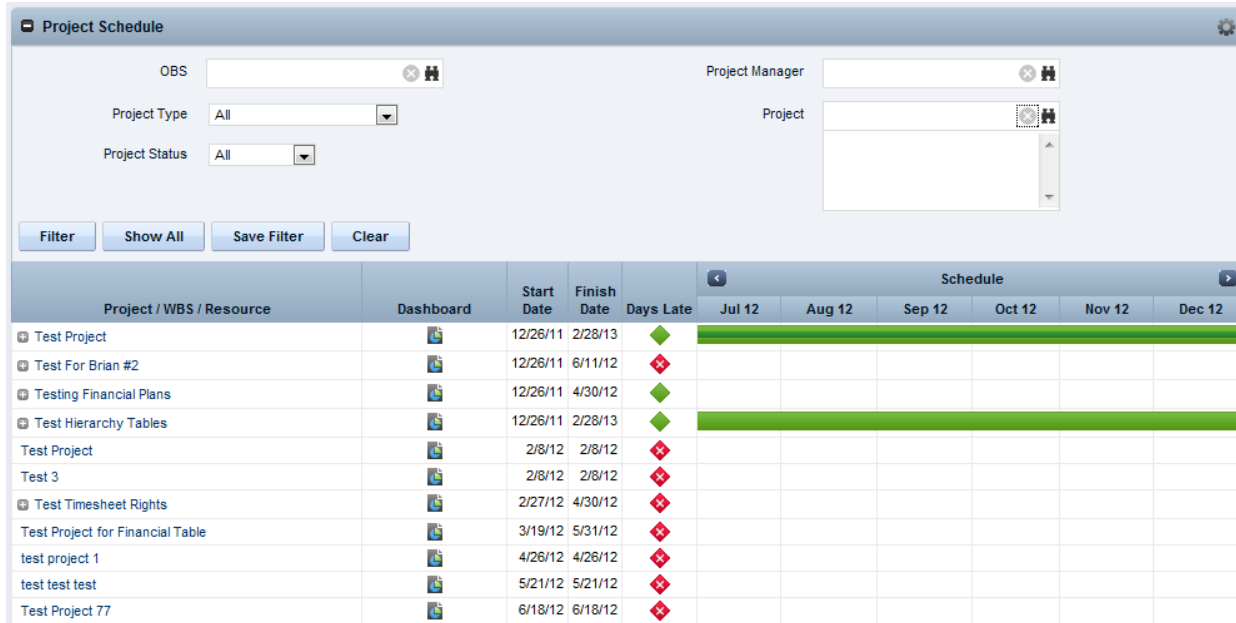
1.069 Project Schedule

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Project WBS Hierarchy

The Project Schedule portlet displays project schedule information in a Gantt chart format. Security on Project. Union of 3 queries to acquire Project/Task/Resource data. Displays stoplights for schedule, cost and hours variance.



1.070 Project Schedule

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Report displaying the project schedule, broken down by task, with status stoplight and Gantt view. Configurable to display at the Project, phase, task or assignment detail.

Project Schedule

Project/WBS/Resource	Start	Finish	Schedule %	Days Late	Gantt Schedule (Months)					
					Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12
Online Customer Release	4/3/2012	8/3/2012		11						
Initiation Phase	4/3/2012	4/3/2012		0						
Initiating Process Complete	4/3/2012	4/3/2012		0						
Planning Phase	4/3/2012	5/14/2012		0						
Define Scope Change and Control Process	4/3/2012	4/9/2012		0						
Define Resource Plan	4/10/2012	4/23/2012		0						
Risk Response and Mitigation Plan	4/10/2012	4/23/2012		0						
Identify Infrastructure Requirements	4/24/2012	5/14/2012		0						
Complete Project Plan	4/24/2012	4/30/2012		0						
Planning Phase Gate Complete	4/30/2012	4/30/2012		0						
Design Phase	5/1/2012	5/21/2012		0						
Requirements Definition	5/1/2012	5/7/2012		0						
Functional and Technical Design	5/8/2012	5/21/2012		0						
Design Phase Gate Complete	5/21/2012	5/21/2012		0						
Construction Phase	5/22/2012	6/30/2012		5						
Database Development	5/22/2012	5/30/2012		2						
User Interface Development	5/29/2012	6/6/2012		2						
Unit and Performance Testing	6/5/2012	6/29/2012		4						
Construction Phase Gate Complete	6/30/2012	6/30/2012		5						
Deployment and Quality Phase	6/26/2012	7/25/2012		9						
Functional and System Testing	6/26/2012	7/4/2012		2						
Usability and User Acceptance Testing	7/3/2012	7/24/2012		8						
Deployment Phase Gate Complete	7/25/2012	7/25/2012		9						
Closing Phase	7/17/2012	8/3/2012		11						
Lessons Learned	7/17/2012	8/3/2012		11						
Closing Phase Gate Complete	7/28/2012	7/28/2012		5						

1.071 Project Schedule

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: System Provider: Project

The Project Schedule portlet displays project alignment, risk, planned cost, and schedule in a Gantt chart format.

Project Schedule

OBS Unit

Unit only

Unit only

Business Owner

Planned Cost

Filter

Show All

Save Filter

Clear

Project▲	Risk	Planned Cost	Schedule				
			Aug 12	Sep 12	Oct 12	Nov 12	Dec 12
Ann's Training Project		250,000					
Another project							
CER Test for ITM A		26,850					
Chris Test							
Chris_Test_2							
Cooper Master 1							
Cooper Sub 1							
Cooper Sub 2							
Dan Teitsma Test Project							
Demo Project 2							
Total		11,534,126					

Page 1 of 4

Displaying 1 - 10 of 34

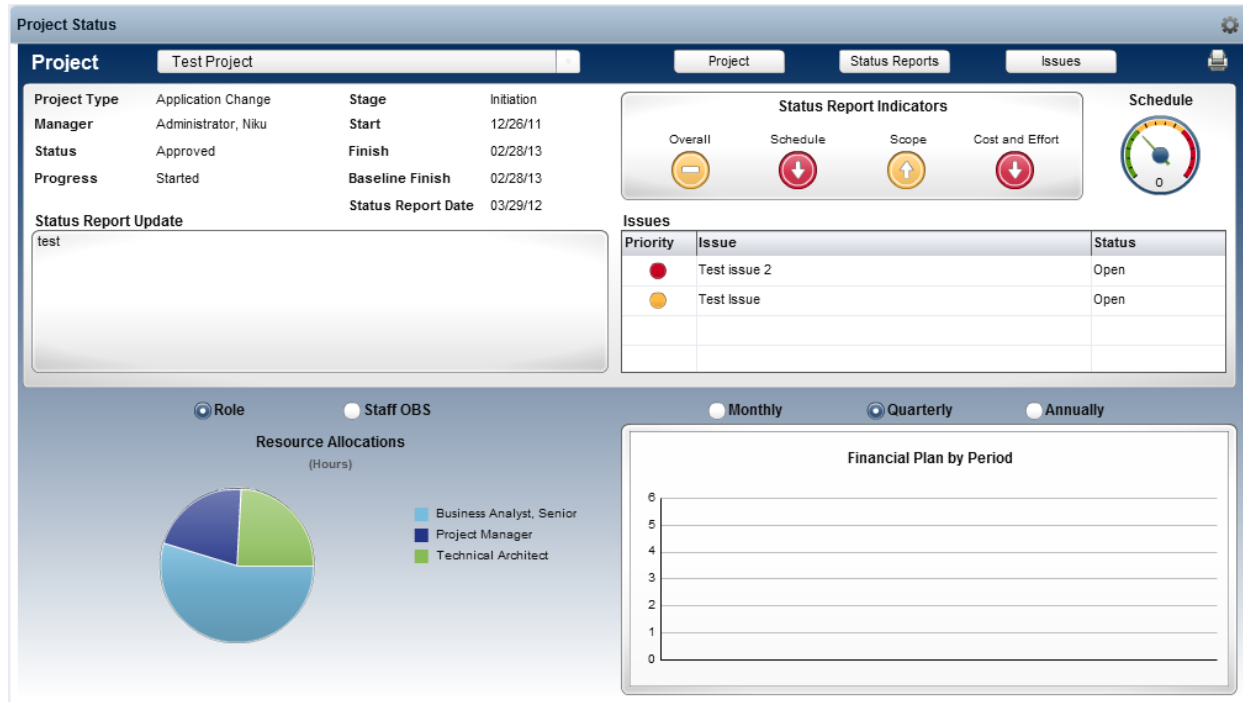
1.072 Project Status

Type: Xcelsius Dashboard

Source: Clarity Solution Pack

Query Used: Project Status Reports Summary; Project Status Labels

Interactive project level detail dashboard displaying summary of project details as well as status and KPI health.



1.073 Project Status Detail

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Multiple page detailed project status report, complete with project team information, stage information, status, KPI stoplights, milestones, and risks, issues and change requests.

Project Status Detail: eCommerce Portal

Project IDPR1002		Status Report Date2/3/2012		Project Objective																	
Project ManagerMartin, Paul		Previous Report Date12/3/2011		Development of a new portal for all Online Client Services																	
Project TypeMajor Project		StatusApproved																			
GoalCost Reduction		ProgressStarted																			
Status Report Update																					
There are some scope and schedule concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. Resource issues are all resolved and development is proceeding, but schedule is impacted. Before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.																					
Stage		Building																			
Finish Date		10/8/2012																			
Baseline Finish Date		10/6/2012																			
Days Late		2																			
		(Hours)																			
Baseline		3,992.00																			
Actuals		664.00																			
Estimate To Complete		3,448.00																			
Estimate At Completion		4,112.00																			
Projected Effort Variance		120.00																			
Projected Effort Variance %		⬇️																			
Status Report Indicators																					
Overall		⬇️⬅️																			
Schedule		⬇️⬅️																			
Scope		⬇️⬅️																			
Cost and Effort		⬇️⬅️																			
Project Indicators																					
Schedule to Baseline		⬇️																			
Alignment		⬇️																			
Risk		⬇️																			
Issue		⬇️⬅️																			
Change		⬇️																			
Project Team																					
Resource Name		Project Role		Start		Baseline Start		Finish		Baseline Finish		Booking Status		Request Status		Allocation Hours		Actual Hours		ETC Hours	
Kelley, Art		Architect		10/4/2011		10/20/2011		10/8/2012		8/15/2012		Soft		New		572.00		60.00		250.00	
Morris, Tom		Architect		10/4/2011		10/20/2011		10/8/2012		8/29/2012		Soft		New		360.00		140.00		360.00	
Goldman, Mark		Business Analyst		10/4/2011		10/20/2011		10/8/2012		10/5/2012		Soft		New		708.00		140.00		364.00	
Hill, Wayne		Developer		10/4/2011		12/12/2011		10/8/2012		8/29/2012		Soft		New		644.00		156.00		604.00	
Patel, Sanjay		Developer		10/4/2011		1/16/2012		10/8/2012		7/17/2012		Soft		New		496.00		0.00		320.00	
Stoneburg, Sam		Network Engineer		10/4/2011		11/14/2011		10/8/2012		8/22/2012		Soft		New		714.00		40.00		440.00	
Martin, Paul		Project Manager		10/4/2011		10/4/2011		10/8/2012		10/5/2012		Soft		New		358.00		128.00		150.00	
Storage Architect		Storage Architect		10/4/2011		10/4/2011		10/8/2012		8/22/2012		Soft		New		128.00		0.00		120.00	
Turner, Bruce		Test Engineer		10/4/2011		1/16/2012		10/8/2012		8/15/2012		Soft		New		1,046.00		0.00		840.00	
Key Milestones																					
Name		ID		Status		Finish		Baseline Finish		Days Late		Schedule									
Planning Phase Gate Complete		LM.001.100		Completed		12/12/2011		12/12/2011		0.00		⬇️									
Design Phase Gate Complete		LM.002.100		Not Started		3/26/2012		3/26/2012		0.00		⬇️									
Name		ID		Status		Finish		Baseline Finish		Days Late		Schedule									
Construction Phase Gate Complete		LM.003.100		Not Started		7/19/2012		7/17/2012		2.00		⬇️									
Deployment Phase Gate Complete		LM.004.100		Not Started		9/22/2012		9/8/2012		14.00		⬇️⬅️									
Closing Phase Gate Complete		LM.005.020		Not Started		10/8/2012		10/6/2012		2.00		⬇️									
Risks																					
Name		ID		Description		Priority		Probability		Impact		Status		Response Type		Target Resolution					
Sponsorship Risk		RS1014		Sponsors are difficult to engage for design and approval issues.		Medium		Low		Medium		Open		Watch		2/3/2012					
Resource Availability		RS2000		There are limited resources who can complete this work. Any slippage impacts project finish date.		High		High		Medium		Open		Watch		2/29/2012					
Issues																					
Name		ID		Description		Priority		Status		Target Resolution											
Accept all possible popular pay methods		IS0006		System needs to accept all possible popular pay methods.		Medium		Open		2/15/2012											
Integration with secure payment gateways for better payment processing		IS0005		Portal needs to integrate with secure payment gateways for better payment processing.		Low		Open		2/19/2012											
Requirements are unclear		IS1005		Customer has not defined requirements in enough detail to fully understand the scope.		High		Open		2/23/2012											
Critical resource is unavailable		IS1007		Critical resource is unavailable for the initial design - this will cause estimating issues.		Low		Open		2/25/2012											
System architecture is non-compliant		IS1006		Current funding and availability issues cause us to use a non-compliant architectural stack.		Medium		Work in Progress		3/24/2012											
Change Requests																					
Name		ID		Description		Priority		Status		Expected Close											
Additional Sales Analytics		CH1004		Add metrics for customer loan application demographics		Low		Open		3/17/2012											

1.074 Project Status Reports Summary

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0
Query Used: Project Status Reports Summary

The Project Status Reports Summary portlet lists project status reports to open and get detailed project status updates. Security on Project. Restricted to active non-template projects. Displays stoplights for Overall, Schedule, Scope and Cost status.

Project Status Reports Summary

OBS

Project Manager

Project Type

Status

Project

Filter

Show All

Save Filter

Clear

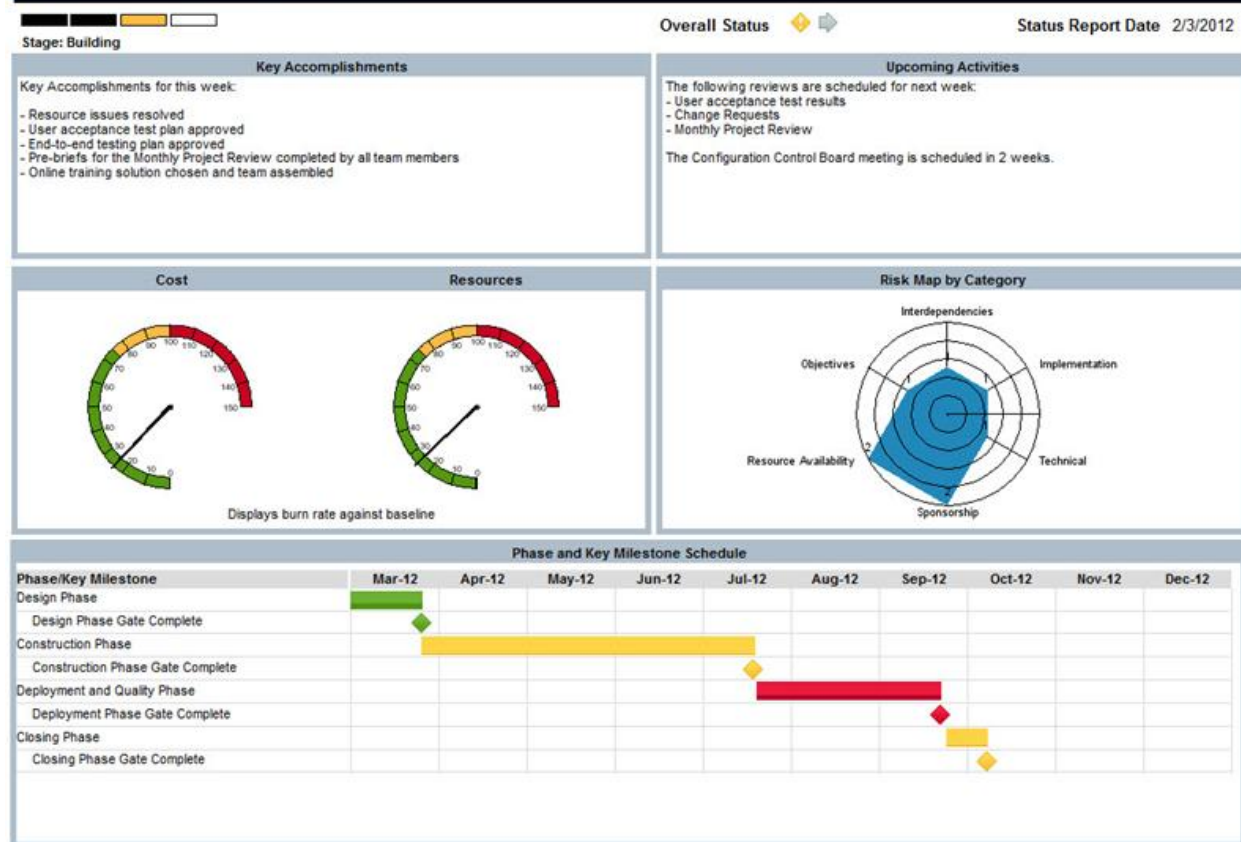
Project	Manager	Overall Status	Status Report Update	Report Date	Schedule	Scope	Cost and Effort
KP_Project Detail Test Project	Parikh, Kesha		Test 2 for Status RReport List	7/18/12			

Displaying 1 - 1 of 1

1.075 Project Status Summary

Type: Crystal Report
Source: Clarity Solution Pack
Query Used: N/A

Project Status Summary: eCommerce Portal



1.076 Project Storyboard

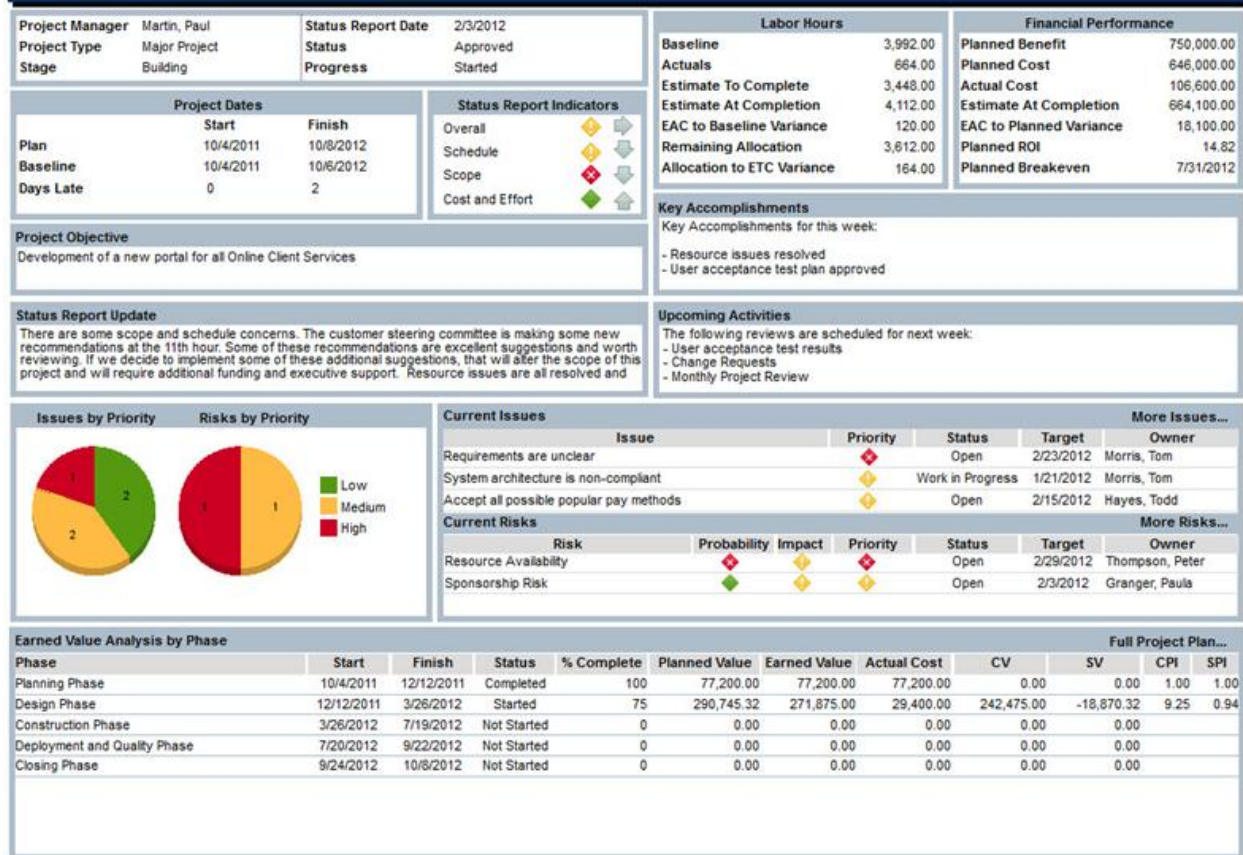
Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Status report for a project with a wealth of detailed health and status information presented in a single easily read format.

Project Storyboard: eCommerce Portal



1.077 Quick Metrics

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Alerts

The Quick Metrics portlet keeps a project manager informed on a project risks, issues, or other issues. Displays on Project. Displays stoplight indicator alerts for risks, issues, change requests, project status, schedule, effort, and cost.



1.078 Recent Project Activity

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Recent Project Activity

The Recent Project Activity portlet lists specific project activities and the number of changes that have occurred with each activity. Displays on project. Union of 7 queries to obtain activity metrics.

Recent Project Activity	
<div> <input checked="" type="checkbox"/> Activity Since 1 Week Ago </div> <div> <input type="button" value="Filter"/> <input type="button" value="Save Filter"/> <input type="button" value="Clear"/> </div>	
Description	Quantity
Late Tasks	0
Completed Tasks	0
<input checked="" type="checkbox"/> Unstaffed Tasks	1
Document Changes	0
Risks	0
<input checked="" type="checkbox"/> Issues	2
<input checked="" type="checkbox"/> Change Requests	1
Highlighted rows = activity	
<input checked="" type="checkbox"/> = Required	

1.079 Resource Allocation

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Resource Capacity and Demand

The Resource Allocation portlet displays resource allocation by month, for investments and roles included in a portfolio. Use this portlet to view the list of resources and roles that are allocated to the portfolio investments. Security on Resources. Resources are listed with primary role the same as project role as they have availability only under their primary roles. Also, availability - allocation variance is listed only for the resource records with project role the same as primary role. Roles do not have availability, so have no variance. Displays stoplight for under/over allocation. Displays on Portfolio.

Resource Allocation						
Resource OBS						
Resource						
Period Start Date						
Resource	Role	Jan 12	Feb 12	Mar 12	Apr 12	
Gallinger, Brian	[--No Role Assigned--]	176.00	180.00	264.00	58.80	
Dolak, Jerry	Architect	0.00	8.00	0.00	0.00	
Business Analyst, Senior	Business Analyst, Senior	352.00	336.00	352.00	336.00	
Gallinger, Aaron	Business Analyst, Senior	88.00	84.00	88.00	84.00	
Reynolds, Clayton	Project Manager	121.90	128.00	134.10	294.00	
Gallinger, Brian	Technical Architect	0.00	8.00	0.00	0.00	
Total		737.90	744.00	838.10	772.80	

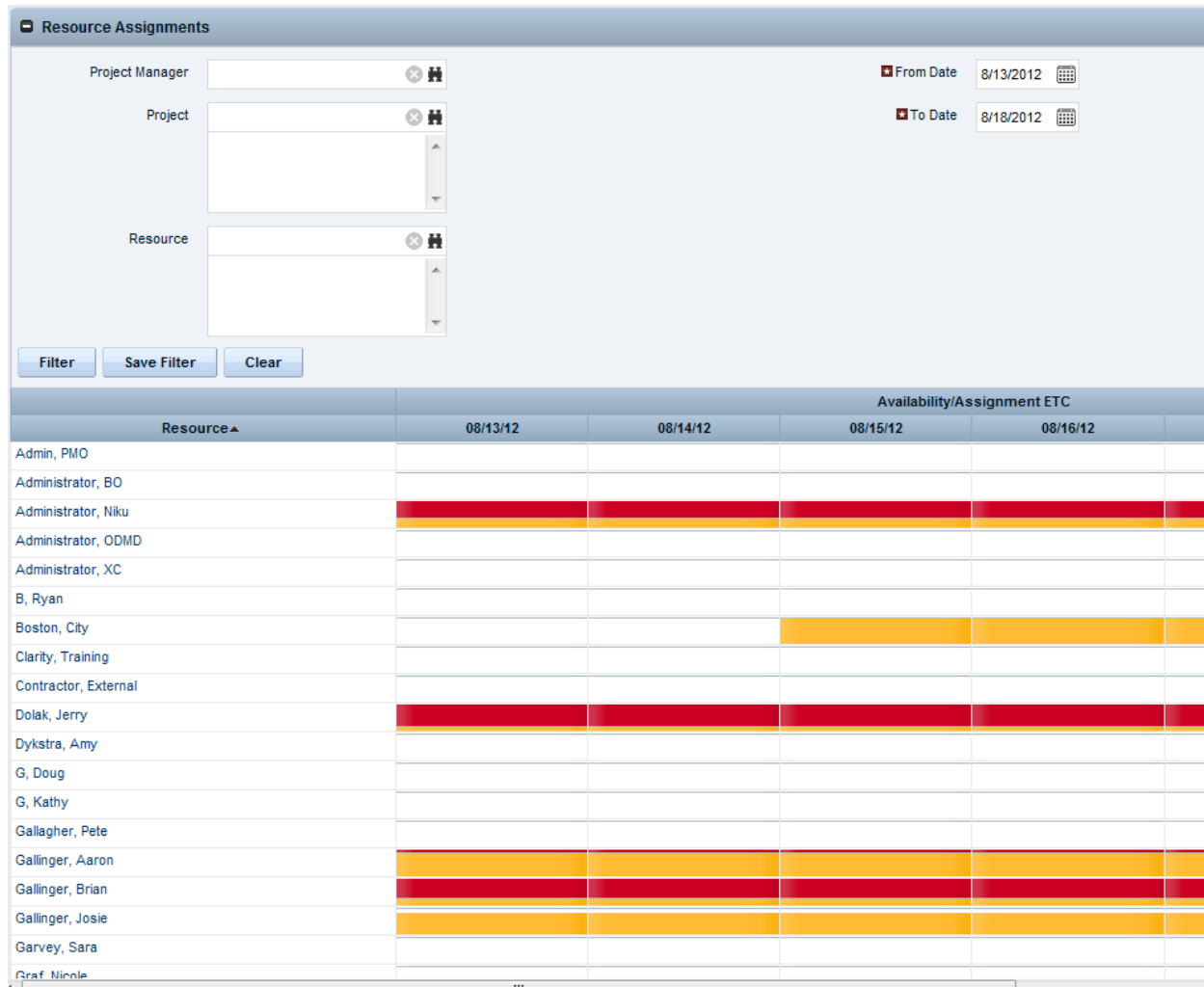
1.080 Resource Assignments

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Resource Supply and Demand

The Resource Assignments portlet displays the availability and assignments information for resources in a histogram format. Security on Resources. Union of 3 queries.



1.081 Resource Capacity and Allocation

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Resource Capacity and Demand

The Resource Capacity and Allocation portlet displays resource capacity, allocation demand, and variance by month for investments and roles included in a portfolio. Use this portlet to view the list of resources and roles that are allocated to the portfolio investments and identify over-allocated and under-allocated resources.

Security on Resources. Resources are listed with primary role the same as project role as they have availability only under their primary roles. Also, availability - allocation variance is listed only for the resource records with project role the same as primary role. Roles do not have availability, so have no variance. Displays stoplight for under/over allocation. Displays on Portfolio.

Resource Capacity and Allocation														
Resource OBS														
Resource														
Period Start Date														
Filter	Show All	Save Filter	Clear											
Resource	Role	Jan 12			Feb 12			Mar 12			Apr 12			Capacity
		Capacity	Allocation	Variance	Capacity	Allocation	Variance	Capacity	Allocation	Variance	Capacity	Allocation	Variance	
Gallinger, Brian	[--No Role Assigned--]	0.00	176.00	(176.00)	0.00	180.00	(180.00)	0.00	264.00	(264.00)	0.00	58.80	(58.80)	0.00
Dolak, Jerry	Architect	0.00	0.00	0.00	0.00	8.00	(8.00)	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Business Analyst, Senior	Business Analyst, Senior	0.00	352.00	(352.00)	0.00	336.00	(336.00)	0.00	352.00	(352.00)	0.00	336.00	(336.00)	0.00
Gallinger, Aaron	Business Analyst, Senior	176.00	88.00	88.00	168.00	84.00	84.00	176.00	88.00	88.00	168.00	84.00	84.00	184.00
Reynolds, Clayton	Project Manager	160.00	121.90	38.10	168.00	128.00	40.00	176.00	134.10	41.90	168.00	294.00	(126.00)	184.00
Gallinger, Brian	Technical Architect	176.00	0.00	176.00	168.00	8.00	160.00	176.00	0.00	176.00	168.00	0.00	168.00	184.00
Total		512.00	737.90	(225.90)	504.00	744.00	(240.00)	528.00	838.10	(310.10)	504.00	772.80	(268.80)	552.00

1.082 Resource Demand

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Resource Allocation

The Resource Demand portlet shows six months of demand information, starting with the current month. Security on Resources. Union of 3 queries. Availability and Allocation pulled from the slices tables.

Resource Demand

OBS

✕

Outlook Periods

All

▼

Role

✕

Hours or FTE

All

▼

Filter

Show All

Save Filter

Clear

	Hours / FTE																	
Type / Project / Role	Total	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	Feb 13	Mar 13	Apr 13	May 13	Jun 13	Jul 13	Aug 13	Sep 13	Oct 13	Nov 13	Dec
Infrastructure Deployment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Major Project	1,024.00	744.00	160.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VFB - 2	224.00	224.00																
VFB Demo -1	224.00	224.00																
VFB IDEA APR-20 - 1	576.00	296.00	160.00	120.00														
[No Project Type]	62,718.40	9,661.93	7,888.63	8,612.67	7,896.99	6,807.31	5,224.00	4,070.86	2,316.00	2,404.00	2,326.00	2,050.00	1,606.00	486.00	450.00	486.00	432.00	0.00
Other Work	1,728.00	352.00	320.00	368.00	352.00	336.00												
Total	65,470.40	10,757.93	8,368.63	9,100.67	8,248.99	7,143.31	5,224.00	4,070.86	2,316.00	2,404.00	2,326.00	2,050.00	1,606.00	486.00	450.00	486.00	432.00	0.00

1.083 Resource Demand on Investments

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: System Provider: Portfolio: All Investment Types

The Resource Demand on Investments portlet displays priority, planned cost, and resource demand information for investments included in the portfolio. This portlet comes as a pair for What If scenario analysis.

Resource Demand on Investments [-Base Scenario-]						
Resource Demand <input type="text"/> to <input type="text"/>						
Finish <input type="text"/> to <input type="text"/>						
Power Filter [Build Power Filter]						
Filter Show All Save Filter Clear						
Investment		Priority▲	Start	Finish	Planned Cost	Role Demand
Test Project		10	12/26/11	2/28/13	39,315	9,706.80
Project #4		10	2/28/12	4/29/12	0	
Test Idea		10	2/13/12	2/13/12	0	16.00
Investment Total					39,315	9,722.80
Portfolio Comparison					7,000,000	6,248.00
Variance					6,960,685	(3,474.80)
Displaying 1 - 3 of 3						
Highlighted rows = Approved Flag Currency = USD						

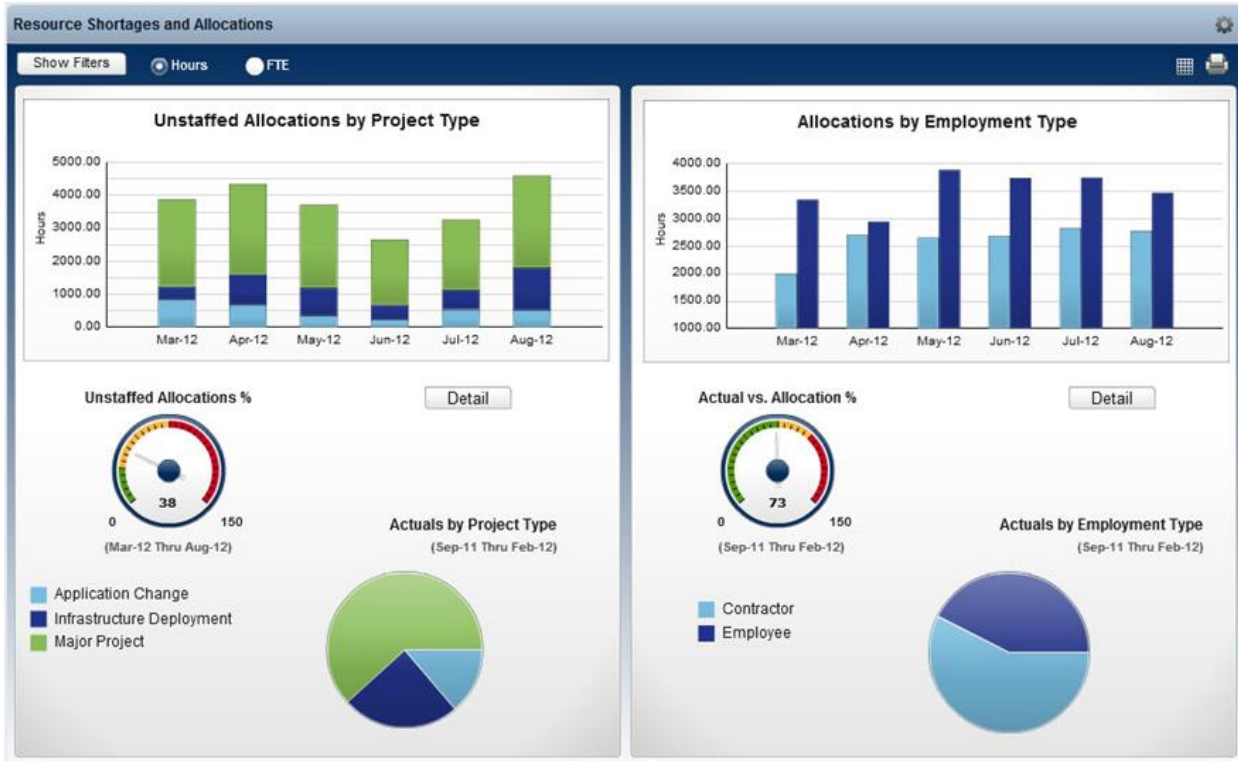
1.084 Resource Shortages and Allocations

Type: Xcelsius Dashboard

Source: Clarity Solution Pack

Query Used: N/A

Dashboard for resource managers showing Allocation vs. Staffing by Project Type, and Allocations vs. Actuals by Employment Type.



1.085 Resource Supply

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Resource Availability

The Resource Supply portlet displays six months of supply information for roles, starting with the current month. Security on Resources. Availability taken from the slices tables.

Resource Supply

OBS: Organization: Internal Initiatives Outlook Periods: 6 Months

Role: Hours or FTE: Hours

Filter Show All Save Filter Clear

Role	Total	Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13
Network Engineer	1,056.00	184.00	160.00	184.00	176.00	168.00	
Project Manager	1,056.00	184.00	160.00	184.00	176.00	168.00	
Total	2,112.00	368.00	320.00	368.00	352.00	336.00	

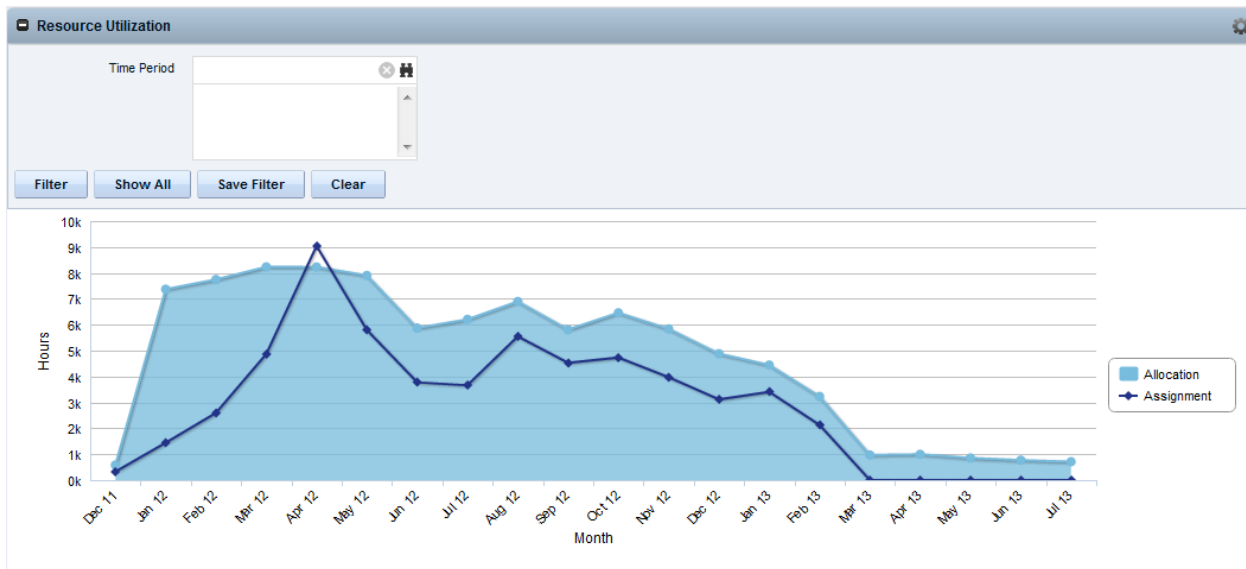
1.086 Resource Utilization

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Investment Resource Utilization

The Resource Utilization portlet displays allocation versus assignment by month, illustrated in an area graph. Use the Resource Utilization portlet to view the amount of resource effort required or expected to complete the projects associated to a program. Pulls utilization from slice tables 'MONTHLYRESOURCEACTCURVE', 'MONTHLYRESOURCEESTCURVE', and 'MONTHLYRESOURCEALLOCCURVE'. Limited to active projects.



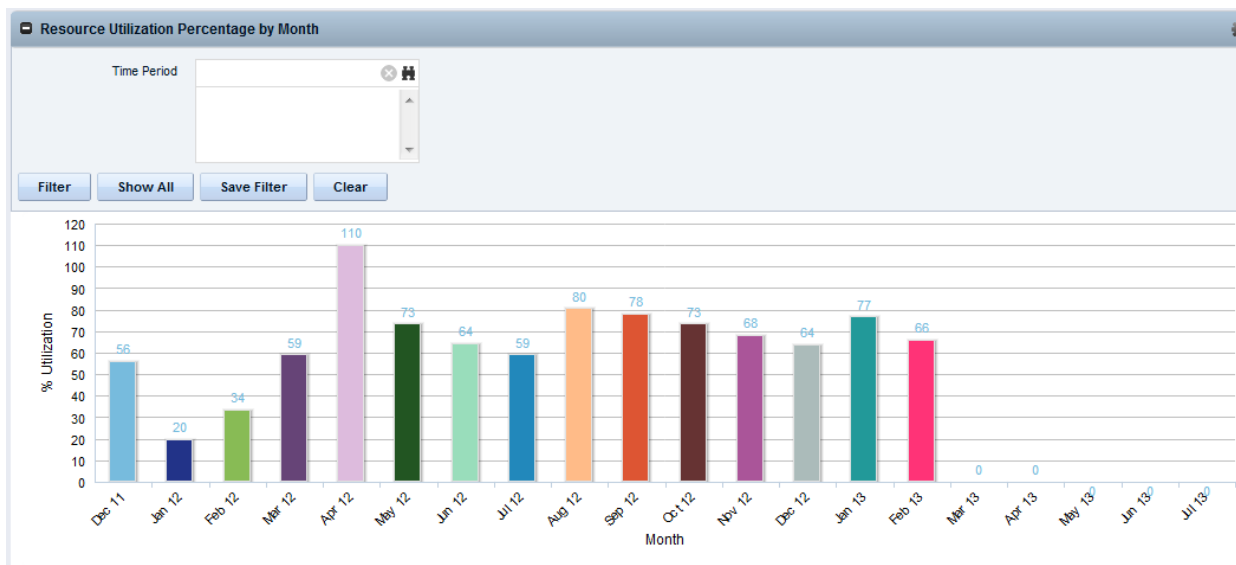
1.087 Resource Utilization Percentage by Month

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Investment Resource Utilization

The Resource Utilization Percentage by Month portlet displays resource assignments as a percentage of allocations by month, illustrated in a column graph. Use this portlet to verify that all resources assigned to the projects are fully utilized. Pulls utilization from slice tables 'MONTHLYRESOURCEACTCURVE', 'MONTHLYRESOURCEESTCURVE', and 'MONTHLYRESOURCEALLOCCURVE'. Limited to active projects.



1.088 Resource Work Queue

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Resource Tasks

The Resource Work Queue portlet provides team resource information for each task and displays daily ETCs in a chart format. Security on Resources. Pulls from prassignment and timeentry tables as well as 'DAILYRESOURCEESTCURVE' slice. Displays stoplights for Task Priority and Days Late.

Resource Work Queue

Project Manager

Project

Resource

Filter

Save Filter

Clear

From Date

8/13/2012

To Date

8/18/2012

ETC

Resource▲	Project	Task	Status	Priority	Schedule	08/13/12	08/14/12	08/15/12	08/16/12	08/17/12	08/18/12
Administrator, Niku	Demo Project 2	Demo Project 2	Not Started	◆	◆	16	16	16	16	16	0
Administrator, Niku	Demo Project 2	Task 1	Not Started	◆	◆	8	8	8	8	8	0
Dolak, Jerry	VFB - 1 - Open WorkBench	VFB - 1 - Open WorkBench	Not Started	◆	◆	8	8	8	8	8	0
Dolak, Jerry	Cooper Sub 2	Cooper Sub 1	Not Started		◆	8	8	8	8	8	0
Dolak, Jerry	Cooper Sub 1	Cooper Sub 1	Not Started		◆	8	8	8	8	8	0
Dolak, Jerry	Cooper Master 1	Cooper Master 1	Not Started	◆	◆	8	8	8	8	8	0
Gallinger, Aaron	Test Project	Brian G Test Project	Started	◆	◆	4	4	4	4	4	0
Gallinger, Brian	VFB - 1 - Open WorkBench	VFB - 1 - Open WorkBench	Not Started	◆	◆	8	8	8	8	8	0
Gallinger, Brian	Test Project	Brian G Test Project	Started	◆	◆	10	10	10	10	10	0
Hill, Robbin	Ann's Training	Ann's Training	Not Started	◆	◆	1	1	1	1	1	0

1.089 Risk Management

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Risk Management

The Risk Management portlet displays a list of risks associated with projects to which you have access. The portlet has a default filter set to limit the risks to only the risks with a status of "Open" or "Work in Progress". Security on Projects and Risks. Displays stoplights for Risk Priority and Impact, and a flag for those above threshold.

Risk Management

OBS

Project Manager

Project

Priority

All

Owner

Category

All

Status

Open

Work in Progress

Target Resolution Date

to

Filter

Show All

Save Filter

Clear

	Project	Risk	Description	Priority	Probability	Impact	Above Threshold	Target Resolution Date▲	Category	Owner	
	CER Test for ITM A	Test Risk 1	This is a test Risk	▲	▲	▲	✓	12/30/11	Flexibility	Reynolds, Clayton	
	Test Project	Risk For Brian #1		▲	▲	▲	✓	1/1/12	Interdependencies	Gallinger, Brian	
	Test Project	Test Risk 2 for Brian		▲	▲	▲	✓	2/13/12	Flexibility	Gallinger, Brian	
	Test Project	Test Risk #2	teswt 2	▲	▲	▲	✓	2/15/12	Funding	Gallinger, Brian	
	Demonstration Project	Issue 1		▲	▲	▲	✓	2/24/12		User, PM	
	RH Test Project	RH Test Issue	test	▲	▲	▲	✓	3/13/12	Funding	Hill, Robbin	
	RH Test Project	RH Test Risk	Test	▲	▲	▲	✓	3/13/12	Resource Availability	Hill, Robbin	
	Ann's Training Project	Autoscheduler risk		▲	▲	▲	✓	3/27/12		Gallinger, Brian	
	KP_Project Detail Test Project	TEST1	Test Test Test 1	▲	▲	▲	✓	7/18/12	Interdependencies	Parikh, Kesha	

Displaying 1 - 9 of 9

1.090 Risks

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Risks

The Risks portlet shows the project risks flagged to be included in status reporting on the risk properties page. Security on Projects and Risks. Displays a flag for risks above threshold. Non-filterable.

Risks									
Project	Risk Description	Status	Target Resolution Date	Above Threshold	Probability	Impact	Category	Owner	
RH Test Project	test	Open	3/13/12	✓	◆	◆	Funding	Hill, Robbin	
Displaying 1 - 1 of 1									

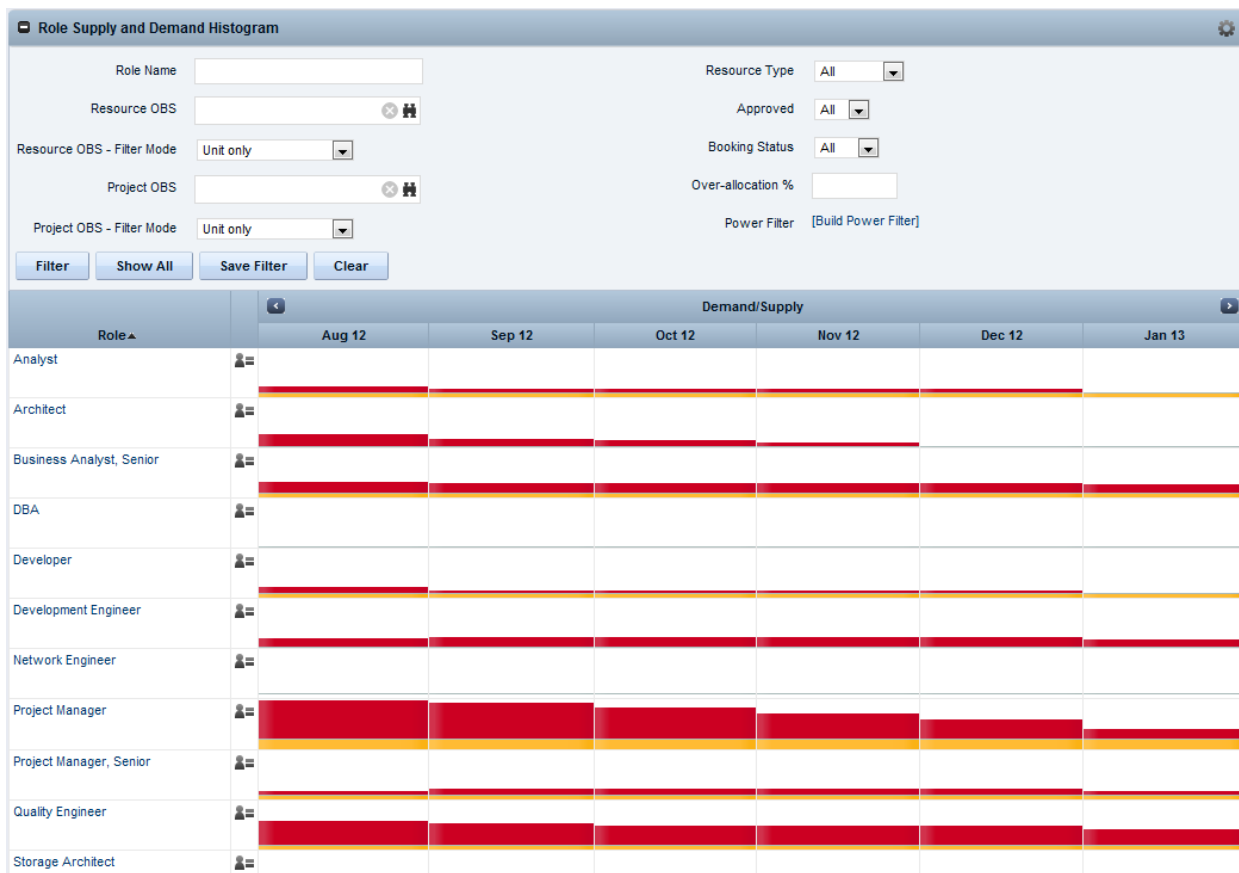
1.091 Role Supply and Demand Histogram

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: System Provider: Roles with Resource Aggregation

Use the Role Supply and Demand page to assess the supply and demand for your project roles.



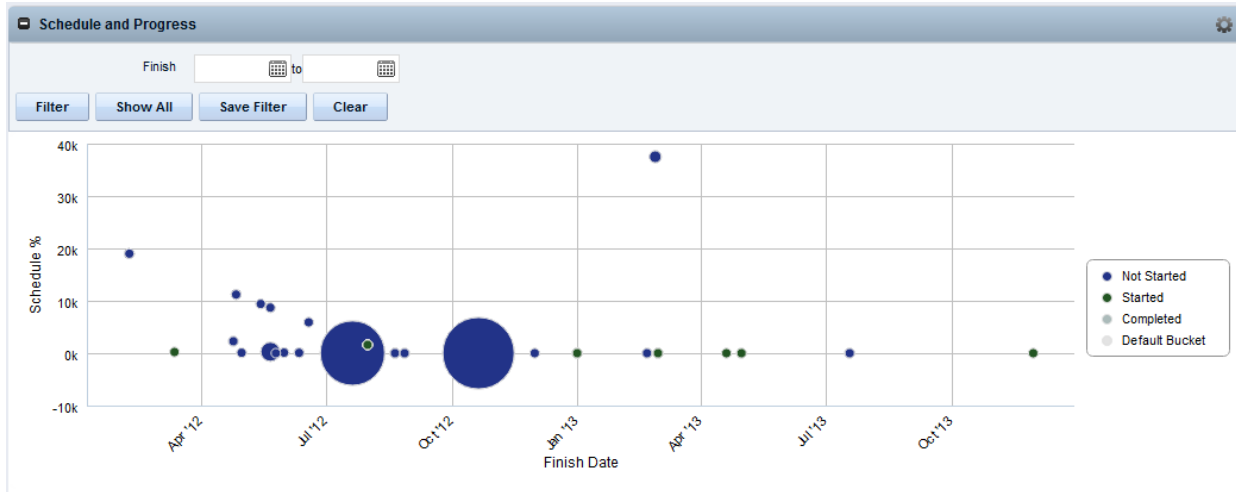
1.092 Schedule and Progress

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Schedule and Progress

The Schedule and Progress portlet displays a bubble graph that shows how the score of each project balances between its scheduled variance and its current finish date. Security on Projects. Limited to active projects. Displays Stoplights on Days Late and Schedule health, as well as an Approval Status indicator.



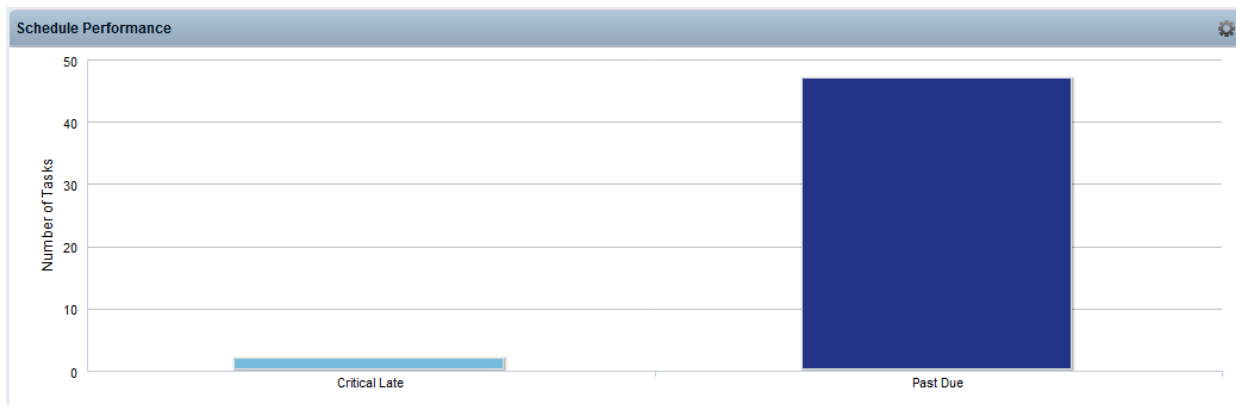
1.093 Schedule Performance

Type: Chart Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Schedule Performance

The Schedule Performance portlet displays the number of ontime, past-due and critically late tasks in a column graph format. Security on Projects.



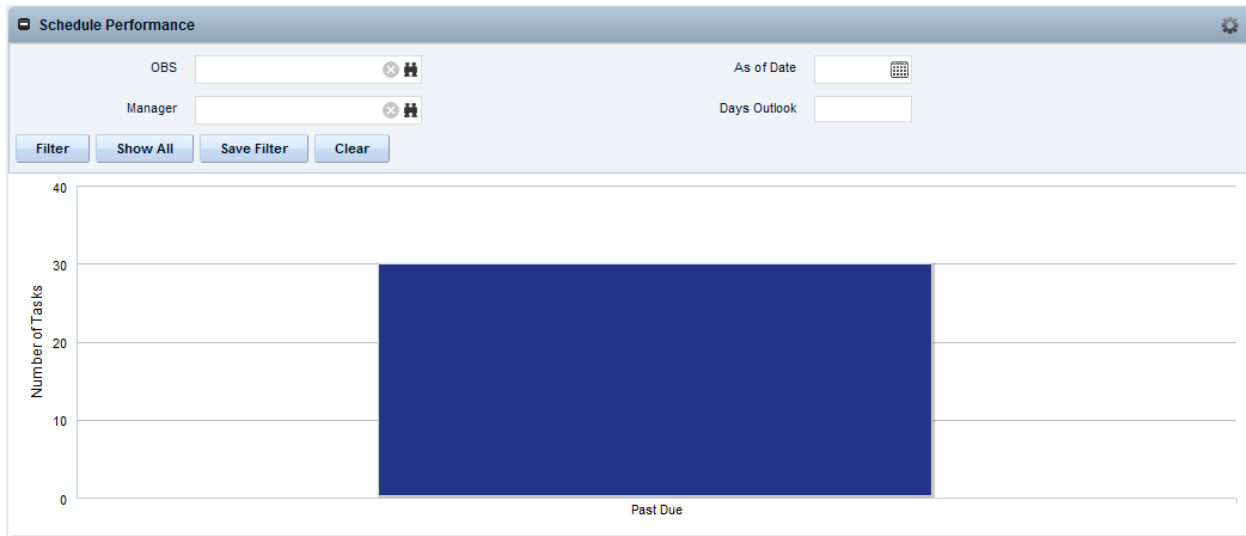
1.094 Schedule Performance

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in 3.0)

Query Used: Schedule Performance

The Schedule Performance portlet displays the number of late tasks categorized as critical late, past due, or scheduled late within the days outlook displayed as a bar graph. Security on Projects
(Documentation incorrectly states this is a pie chart)



1.095 Schedule Performance Details

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Schedule Performance Details

The Schedule Performance Details portlet allows you to view information at a 'drill-down' level of detail from the Schedule Performance portlet. Security on Projects. Effort taken from prtask. Limited to active projects only.

Schedule Performance Drill Down

Project Manager

As Of Date

Days Outlook

OBS Unit

Filter

More

Schedule Performance Details

Project	Task	Status	Classification	Due Date▲	Days Late	Total Effort
Cooper Sub 2	Sub Task 1	Not Started	Critical Late	7/16/12	31	8
Cooper Sub 1	Subtask 1	Not Started	Critical Late	7/20/12	27	8
Total					58	16

1.096 Schedule Performance Details

Type: Grid Portlet

Source: PMO Accelerator v3.0

Query Used: Schedule Performance Details

This portlet results from clicking on a category in the Schedule Performance portlet, and displays a list of the critical late, past due, or scheduled late tasks within the days outlook. Also shows Effort and ETC. Security on Projects. Effort taken from prtask. Displays stoplights for Days Late, Schedule % and Projected Effort Variance. Limited to active projects only.

Schedule Performance Details													
Project		Task Name											
		Finish											
		As of Date											
		Days Outlook											
Filter		Show All											
		Save Filter											
		Clear											
	Project	Task	Status	Classification	Finish	Schedule %	Days Late	BAC	Actuals	ETC	EAC	Projected Effort Variance	Projected Effort Variance %
	VFB - 1 - Open WorkBench	Conduct Project Mgt	Not Started	Past Due	7/12/12		35		0	0	0		
	VFB - 1 - Open WorkBench	Meetings	Not Started	Past Due	7/12/12		35		0	0	0		
	KP_Project Detail Test Project	Define Requirements	Not Started	Past Due	7/17/12		30	20	0	20	20	0	
	Cooper Master 1	Master Task 1	Not Started	Past Due	7/18/12		29		0	8	8		
	KP_Project Detail Test Project	Build	Not Started	Past Due	7/20/12		27	25	0	25	25	0	
	KP_Project Detail Test Project	Define Requirements	Not Started	Past Due	7/20/12		27	20	0	20	20	0	
	KP_Project Detail Test Project	Test	Not Started	Past Due	7/24/12		23	25	0	25	25	0	
	KP_Project Detail Test Project	Train	Not Started	Past Due	7/25/12		22	5	0	5	5	0	
	KP_Project Detail Test Project	Implement Highlight Report	Not Started	Past Due	7/26/12		21	6	0	6	6	0	
	KP_Project Detail Test Project	Define Requirements	Not Started	Past Due	7/26/12		21	15	0	15	15	0	
	Cooper Sub 1	Define Scope Change and Control Process	Not Started	Past Due	7/27/12		20		0	40	40		
	KP_Project Detail Test Project	Build	Not Started	Past Due	7/27/12		20	25	0	25	25	0	
	Cooper Sub 1	Define Resource Plan	Not Started	Past Due	7/30/12		17		0	8	8		
	Chris Test	Chris Test	Not Started	Past Due	7/31/12		16		0	8	8		
	Chris_Test_2	Chris_Test_2	Not Started	Past Due	7/31/12		16		0	8	8		
	KP_Project Detail Test Project	Test	Not Started	Past Due	7/31/12		16	25	0	25	25	0	
	KP_Project Detail Test Project	Build & Test	Not Started	Past Due	7/31/12		16	15	0	15	15	0	
	KP_Project Detail Test Project	Train	Not Started	Past Due	8/1/12		15	5	0	5	5	0	
	Training Project 2	Define Resource Plan	Started	Past Due	8/1/12		15		8	0	8		
	KP_Project Detail Test Project	Implement HSBC Project Dashboard Main Report	Not Started	Past Due	8/2/12		14	6	0	6	6	0	
Total							792	335	40	1,095	1,135	0	
Page 1 of 3													
Displaying 1 - 20 of 46													

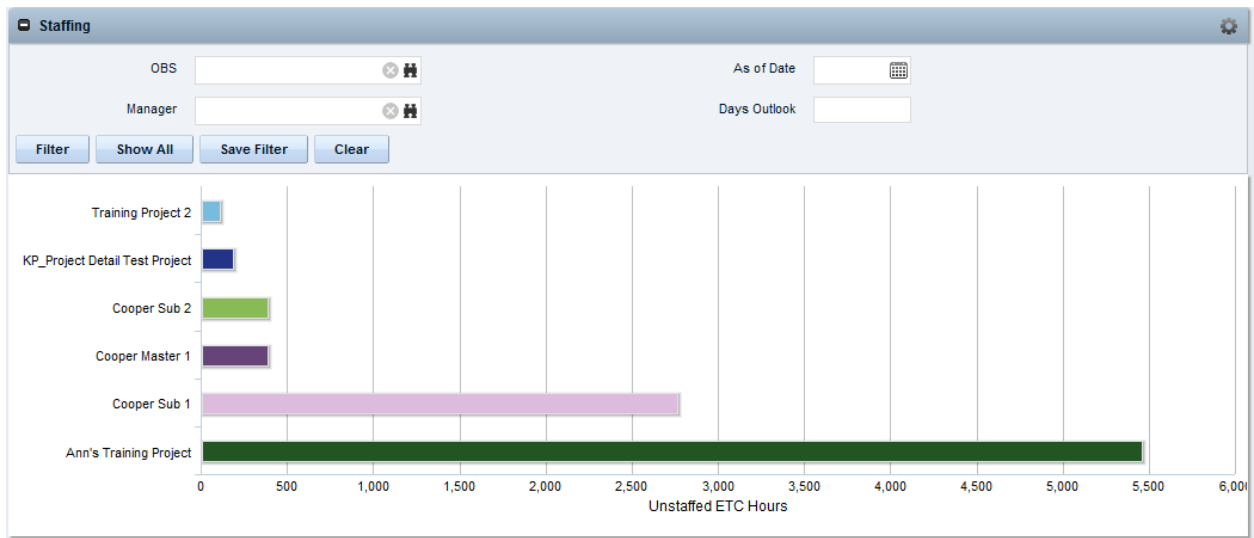
1.097 Staffing

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Staffing

The Staffing portlet lets you identify projects where resources are not assigned to tasks within the days outlook displayed as a bar chart. Security on Projects. Limited to active projects only. ETCs calculated from prtask.



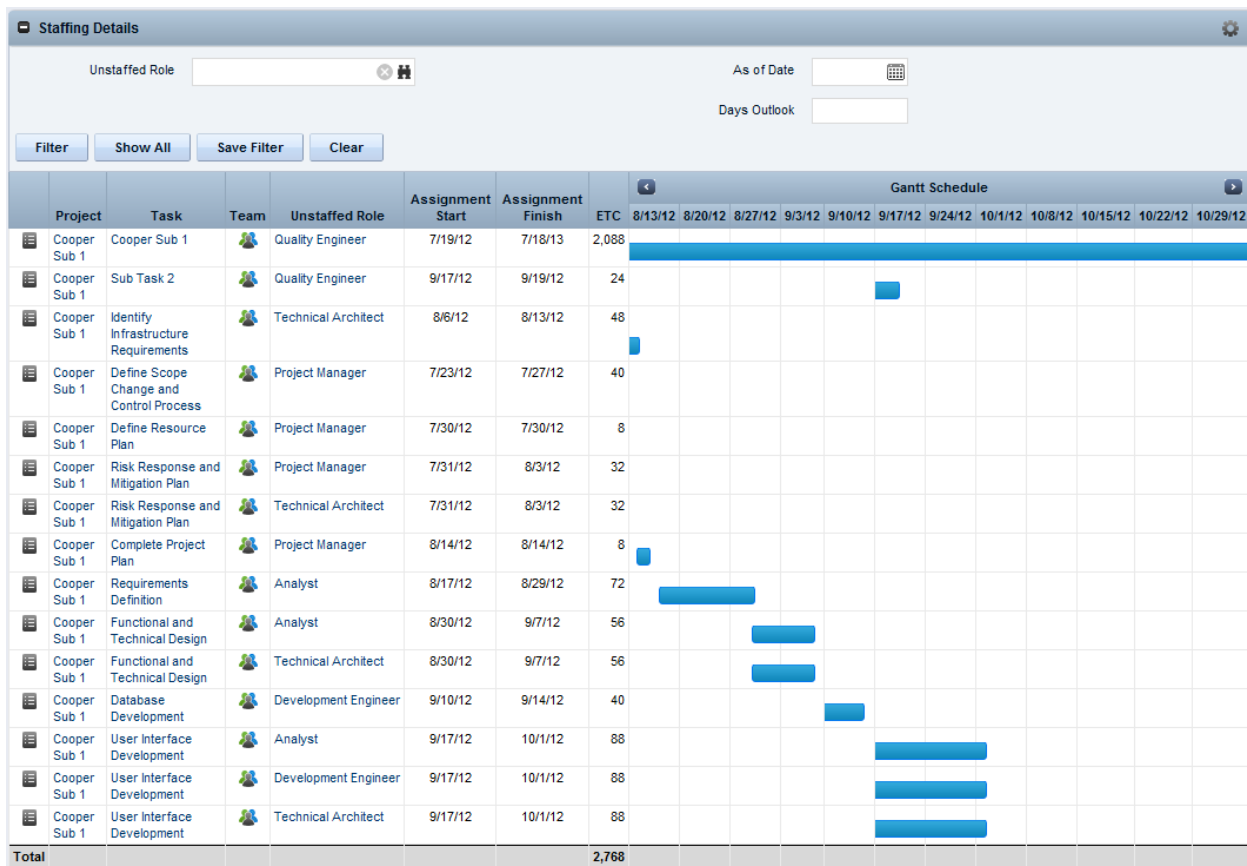
1.098 Staffing Details

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Staffing Details

Use the portlet to view a drill-down list of unstaffed tasks for the selected project from the Staffing portlet. Security on Projects. ETCs calculated from prtask.



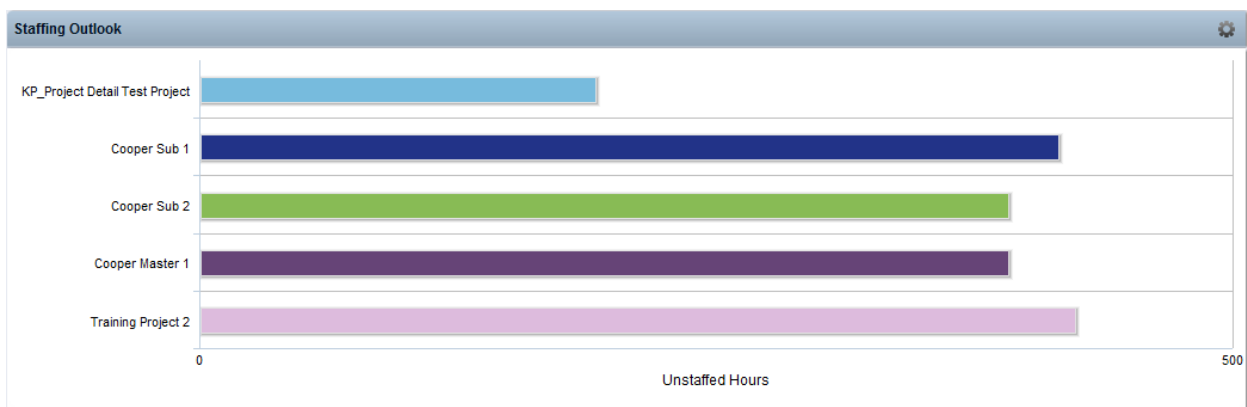
1.099 Staffing Outlook

Type: Chart Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Staffing

The Staffing Outlook portlet lets you identify project tasks where resources are not assigned. The portlet displays in a bar chart format the unstaffed hours or estimate-to-complete (ETC). Security on Projects. Limited to active projects only. ETCs calculated from prtask.



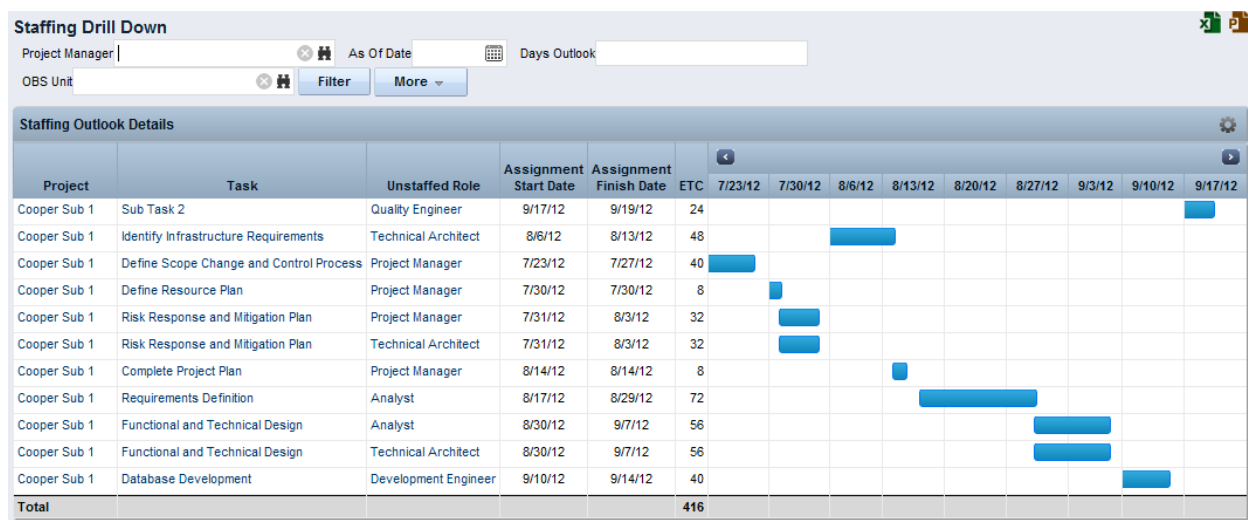
1.0100 Staffing Outlook Details

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Staffing Details

The Staffing Outlook Details portlet lets you view information at a greater level of detail and is accessed by drilling down from the Staffing Outlook portlet. Security on Projects. ETCs calculated from prtask.



1.0101 Status Report Indicators

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Status Report Indicators

The Project Status Report Indicators portlet displays status report indicators from the most recent status report (assuming one exists), based on report date. Security on Projects. Displays variance stoplights for cost/effort, scope, schedule and overall status.

Status Report Indicators

Overall Status	Report Date	Project Manager	Schedule	Scope	Cost and Effort	Status Reports
	4/9/12	Reynolds, Clayton				
	4/19/12	Dolak, Jerry				
	7/18/12	Parikh, Kesha				
	3/29/12	Gallinger, Brian				
	3/29/12	Administrator, Niku				

Displaying 1 - 5 of 5

1.0102 Status Reports

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: System Provider: content.odmd.statusReports

The Status Reports portlet lists all the status reports for a project within a specified date range (Max is 8 weeks). You can also drill down to the properties page for a specific report for more detailed status information.

Status Reports		
Activity Since 8 Weeks Ago		
Filter	Save Filter	Clear
Status Report Update	Overall Status	Report Date
Test 2 for Status REport List		7/18/12
TEST 1		7/15/12
Displaying 1 - 2 of 2		

1.0103 Tasks

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Tasks

The Tasks portlet displays the total amount of effort required to complete any tasks marked to be included in status reporting. Security on Projects. Limited to active projects only. Displays stoplight for Days Late on task.

Tasks												
Project▲	Task	Status	Due Date	Days Late	Total Effort	Schedule						
						Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13	
Test Project	Test Task 1	Started	4/30/12	108	1,059.0							
Test Project	Test Phase	Not Started	5/18/12	90	44.0							
Total					1,103.0							

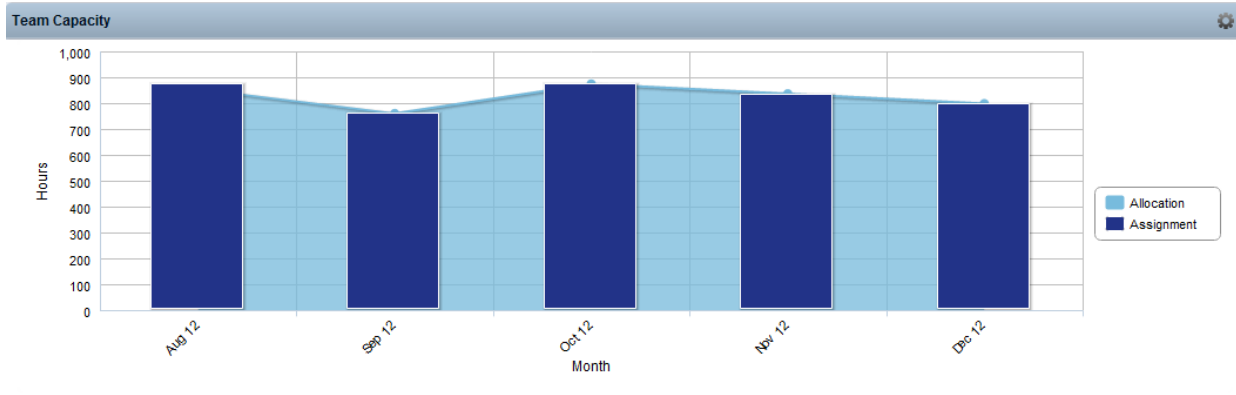
1.0104 Team Capacity

Type: Chart Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Team Capacity

The Team Capacity portlet displays future resource needs of projects. The portlet shows the resource demand on the project compared to the allocation of team members staffed on the project. Security on Projects. Obtains team capacity from default Monthly slice tables. Displays on Projects.



1.0105 Team Member Task Summary

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. in v3.0)

Query Used: Team Member Organizer

The Team Member Task Summary portlet displays resource assignments, ETC, pending actuals, and actuals for project tasks. Use the portlet to analyze task schedule by resource and review estimates and actuals. Security on Projects. Team etc and actuals pulled from prassignment. Displays stoplights on Days Late and Schedule %.

Team Member Task Summary

ProjectTest Project

StatusAll

Resource

Days Late Fromto

Filter

Show All

Save Filter

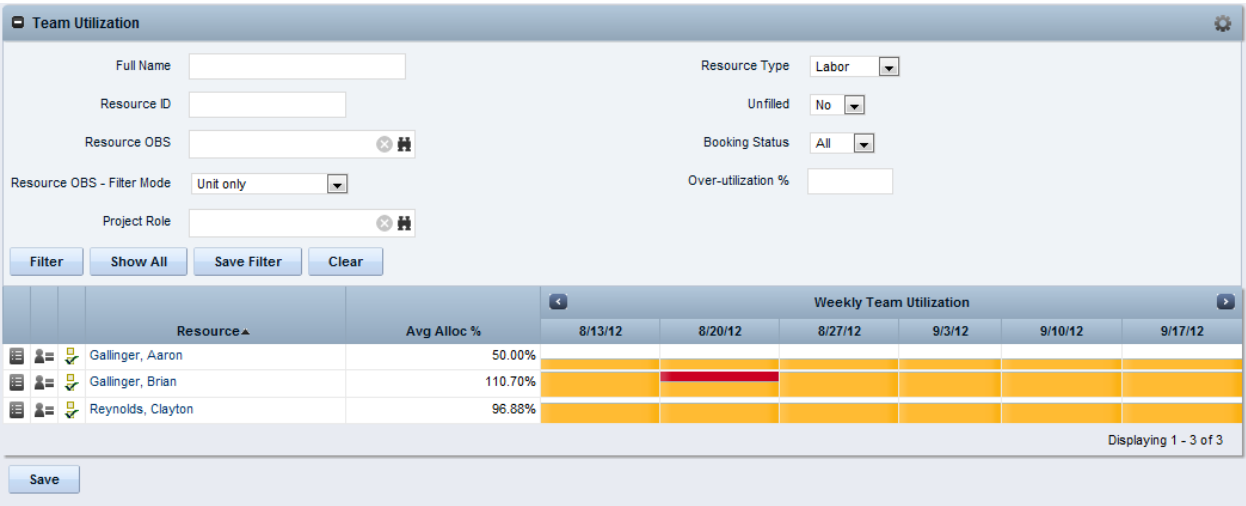
Clear

	Project	Task	Resource/Role	Priority	Status	Schedule %	Days Late	ETC	Pending	Actuals	Actuals	Gantt Schedule						
												August 2012			September 2012			
												8/13/12	8/20/12	8/27/12	9/3/12	9/10/12	9/17/12	
	Test Project	Brian G Test Project	Business Analyst, Senior		Started		0	2,472.00	0.00	0.00								
	Test Project	Brian G Test Project	Gallinger, Brian		Started		0	2,022.80	0.00	28.00								
	Test Project	Brian G Test Project	Reynolds, Clayton		Started		0	1,964.86	0.00	22.00								
	Test Project	Brian G Test Project	Business Analyst, Senior		Started		0	2,472.00	0.00	0.00								
	Test Project	Brian G Test Project	Gallinger, Aaron		Started		0	1,036.00	20.00	97.00								
	Test Project	Test Task 1	Reynolds, Clayton		Started		108	96.00	0.00	32.00								
	Test Project	Test Task 1	Gallinger, Aaron		Started		108	713.00	0.00	15.00								
	Test Project	Test Task 1	Gallinger, Brian		Started		108	112.00	0.00	91.00								
	Test Project	Test Phase	Reynolds, Clayton		Not Started		90	8.00	0.00	0.00								
	Test Project	Test Phase	Business Analyst, Senior		Not Started		90	8.00	0.00	0.00								
	Test Project	Test Phase	Business Analyst, Senior		Not Started		90	8.00	0.00	0.00								
	Test Project	Test Phase	Gallinger, Aaron		Not Started		90	10.00	0.00	0.00								
	Test Project	Test Phase	Gallinger, Brian		Not Started		90	10.00	0.00	0.00								
Total								10,932.66	20.00	285.00								

1.0106 Team Utilization

Type: Grid Portlet
Source: PMO Accelerator v3.0
Query Used: System Provider: Team Allocations

The Team Utilization portlet displays total effort per resource across all the assigned tasks of the project. You can drill down from this view to see utilization by individual resource and task. Displays on Project.



1.0107 Timesheet Notes *

Type: Grid Portlet
Source: PMO Accelerator v3.0 (Enh. in v3.0)
Query Used: Timesheet Notes

Team members, project managers, and resource managers may add notes to timesheets to communicate with one another regarding the timesheet. Notes can be added for the entire timesheet, or for a single timesheet entry. Security on Investments.

1.0108 Timesheet Review

Type: Grid Portlet
Source: PMO Accelerator v3.0
Query Used: Timesheet Review

The Timesheet Review portlet displays project-level pending and posted actuals by task, resource and time period with a notes drill down. Security on Investments.

Timesheet Review

Resource

Employment Type
All ▼

Task

Notes Attached
All ▼

Timesheet Status
Open
Submitted
Returned
Approved
Posted

Adjustment
All ▼

Time Period

[Filter](#)
[Show All](#)
[Save Filter](#)
[Clear](#)

Timesheet	Notes Attached	Resource▲	Employment Type	Task	Status	Adjustment	Period Start	Period End	Pending Actuals	Posted Actuals	Total Actuals
		Gallinger, Aaron	Contractor	Brian G Test Project	Approved		8/6/12	8/12/12	40.00	0.00	40.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Posted		2/27/12	3/4/12	0.00	40.00	40.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Posted		2/20/12	2/26/12	0.00	40.00	40.00
		Gallinger, Aaron	Contractor	Sample 77	Approved		8/6/12	8/12/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Open		2/6/12	2/12/12	20.00	0.00	20.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Posted		1/2/12	1/8/12	0.00	13.00	13.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Open		1/23/12	1/29/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Open		2/13/12	2/19/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Open		12/26/11	1/1/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Brian G Test Project	Posted		1/9/12	1/15/12	0.00	4.00	4.00
		Gallinger, Aaron	Contractor	Test Task 1	Open		12/26/11	1/1/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Test Task 1	Approved		8/6/12	8/12/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Test Task 1	Open		1/23/12	1/29/12	0.00	0.00	0.00
		Gallinger, Aaron	Contractor	Test Task 1	Posted		1/9/12	1/15/12	0.00	4.00	4.00
		Gallinger, Aaron	Contractor	Test Task 1	Posted		1/2/12	1/8/12	0.00	11.00	11.00
		Gallinger, Aaron	Contractor	Test Phase	Approved		8/6/12	8/12/12	0.00	0.00	0.00
		Gallinger, Brian	Contractor	Brian G Test Project	Posted		2/13/12	2/19/12	0.00	16.00	16.00
		Gallinger, Brian	Contractor	Testing Financial Plans	Posted		2/20/12	2/26/12	0.00	24.00	24.00
		Gallinger, Brian	Contractor	Holiday	Posted		1/23/12	1/29/12	0.00	12.00	12.00
		Gallinger, Brian	Contractor	Brian G Test Project	Posted		1/23/12	1/29/12	0.00	12.00	12.00
Total									100.00	637.00	737.00

<< Page 1 of 4 >>

Displaying 1 - 20 of 68

Timesheet Review										
Project Manager		All		Resource Type		All				
Project				Resource						
Notes Attached?		All		Timesheet Status		All				
Include Other Work?		All		Time Periods						
Filter		Show All		Save Filter		Clear				
Notes Attached	Project▲	Task	Resource	Resource Type	Timesheet Status	Period Start	Period End	Pending Actuals	Posted Actuals	Total
	CER Test for ITM A	Test Task 1	Gallinger, Brian	Contractor	Posted	1/2/12	1/8/12	0	12	
	CER Test for ITM A	Test Task 1	Reynolds, Clayton	Employee	Posted	3/26/12	4/1/12	0	7	
	CER Test for ITM A	Test Task 1	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	CER Test for ITM A	Task1	Reynolds, Clayton	Employee	Posted	3/26/12	4/1/12	0	25	
	CER Test for ITM A	Task1	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	CER Test for ITM A	Task2	Reynolds, Clayton	Employee	Posted	3/26/12	4/1/12	0	5	
	CER Test for ITM A	Task2	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	Holiday	Holiday	Gallinger, Brian	Contractor	Posted	1/23/12	1/29/12	0	12	
	Holiday	Holiday	Reynolds, Clayton	Employee	Posted	1/23/12	1/29/12	0	16	
	Holiday	Holiday	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	Jerry Dolak iPad test project	Task1	Gallinger, Brian	Contractor	Posted	1/2/12	1/8/12	0	12	
	Sample 7712345	Sample 77	Gallinger, Aaron	Contractor	Approved	8/6/12	8/12/12	0	0	
	Test For Brian #2	Test For Brian #2	Reynolds, Clayton	Employee	Posted	3/26/12	4/1/12	0	5	
	Test For Brian #2	Test For Brian #2	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	Test For Brian #2	Define Project	Gallinger, Brian	Contractor	Posted	1/9/12	1/15/12	0	0	
	Test For Brian #2	Define Project	Reynolds, Clayton	Employee	Posted	3/26/12	4/1/12	0	10	
	Test For Brian #2	Define Project	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	Test For Brian #2	Build Project	Reynolds, Clayton	Employee	Open	4/9/12	4/15/12	0	0	
	Test For Brian #2	Build Project	Wuenstel, Brian	Employee	Posted	12/26/11	1/1/12	0	20	
	Test For Brian #2	Build Project	Wuenstel, Brian	Employee	Posted	2/13/12	2/19/12	0	24	
Totals								100	637	

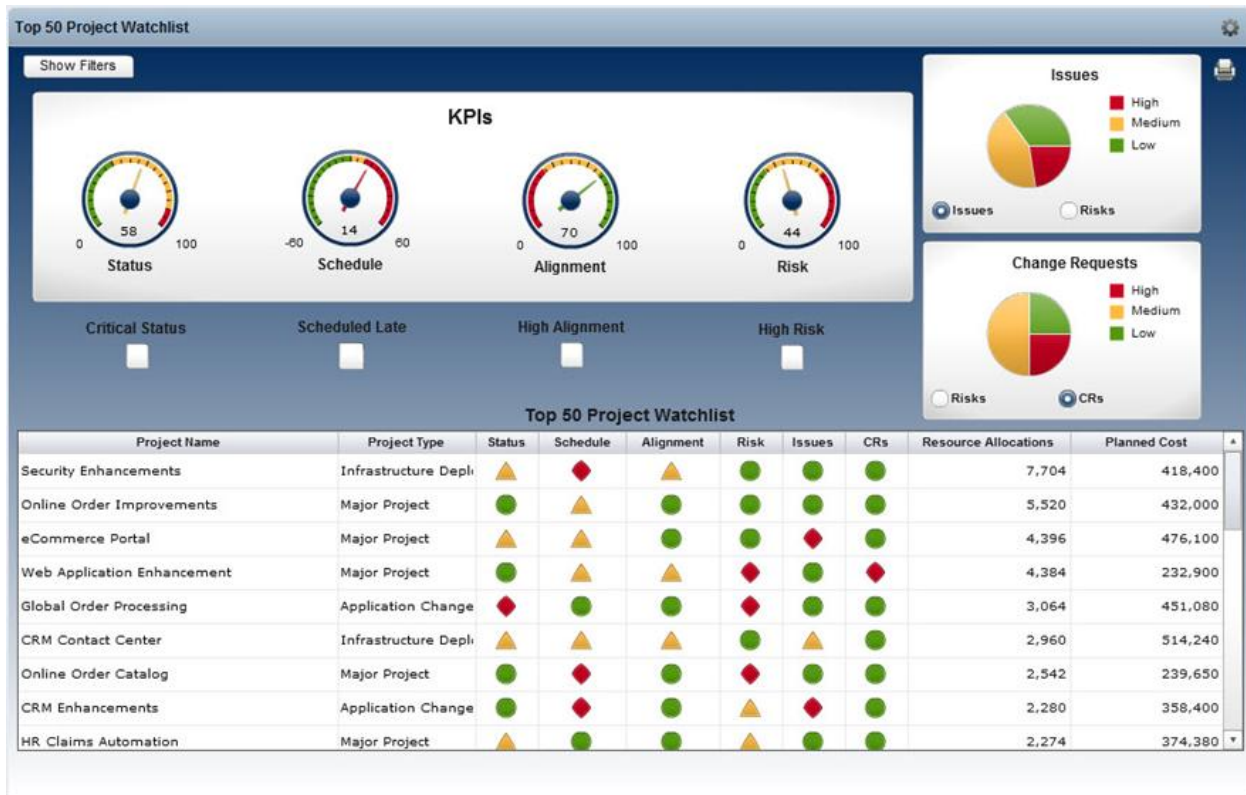
1.0110 Top 50 Project Watchlist

Type: Xcelsius Dashboard

Source: Clarity Solution Pack

Query Used: Top 50 Watchlist

Executive overview of main KPIs and stoplight health breakdown for the top 50 active projects.



1.0111 Unfilled Requirements

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: System Provider: Team Allocations

The Unfilled Requirements portlet provides a view of all the unfilled requirements across projects.

Unfilled Requirements

Requirement Name

Role

Role Type

Booking Status

Request Status

Approved

Project

Project Manager

Project OBS

Project OBS - Filter Mode

Resource OBS

Resource OBS - Filter Mode

Power Filter

Filter

Show All

Save Filter

Clear

	Requirement▲	Role		Project	Booking Status	Request Status	Start	Finish	Allocation	% Allocation
Q	Analyst	Analyst	👤	CER Test for ITM A	Soft	New	1/3/12	5/25/12	720.0	86.54%
Q	Analyst	Analyst	👤	Jerry Dolak iPad test project	Soft	New	1/3/12	7/20/12	568.0	49.31%
Q	Analyst	Analyst	👤	Cooper Sub 1	Soft	New	7/19/12	7/18/13	2,081.0	99.66%
Q	Analyst	Analyst	👤	Training Project 2	Soft	New	1/1/12	12/30/12	2,080.0	99.62%
Q	Analyst (2)	Analyst	👤	Jerry Dolak iPad test project	Soft	New	1/3/12	7/20/12	568.0	49.31%
Q	Architect	Architect	👤	RH Test Project	Soft	New	2/20/12	2/26/12	40.0	100.00%
Q	Architect	Architect	👤	VFB - IDEA APR-20 - 1	Soft	New	4/20/12	10/20/12	1,048.0	100.00%
Q	Business Analyst, Senior	Business Analyst, Senior	👤	RH Test Project	Soft	New	1/2/12	3/12/12	407.0	100.00%
Q	Business Analyst, Senior	Business Analyst, Senior	👤	Test Project	Soft	New	12/26/11	2/28/13	2,472.0	100.00%
Q	Business Analyst, Senior (2)	Business Analyst, Senior	👤	Test Project	Soft	New	12/26/11	2/28/13	2,472.0	100.00%
Q	DBA	DBA	👤	CER Test for ITM A	Soft	New	1/3/12	5/25/12	720.0	86.54%
Q	Developer	Developer	👤	RH Test Project	Soft	New	2/20/12	2/26/12	40.0	100.00%
Q	Developer	Developer	👤	CER Test for ITM A	Soft	New	1/3/12	5/25/12	720.0	86.54%
Q	Developer	Developer	👤	KP_Project Detail Test Project	Soft	New	7/16/12	8/27/12	248.0	100.00%
Q	Developer	Developer	👤	Ann's Training Project	Soft	New	8/13/12	2/26/13	1,136.0	100.00%
Q	Developer	Developer	👤	Training Project 1	Soft	New	8/1/12	8/11/12	64.0	4.10%
Q	Development Engineer	Development Engineer	👤	Ann's Training Project	Soft	New	8/13/12	2/26/13	1,136.0	100.00%
Q	Development Engineer	Development Engineer	👤	Cooper Sub 1	Soft	New	7/19/12	7/18/13	2,081.0	99.66%
Q	Development Engineer	Development Engineer	👤	Training Project 2	Soft	New	1/1/12	12/30/12	2,080.0	99.62%
Q	Network Engineer	Network Engineer	👤	Jerry Dolak iPad test project	Soft	New	1/3/12	7/20/12	880.0	76.39%

◀◀ Page 1 of 2 ▶▶

Displaying 1 - 20 of 37

Save

1.0112 Unstaffed Allocations by Project Type

Type: Crystal Report

Source: Clarity Solution Pack

Query Used: N/A

Report listing all unstaffed allocations on projects, separated by project type and displayed by month.

Unstaffed Allocations by Project Type (Hours)

Application Change

Project Name	Project Manager	Resource Role	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Total
Global Order Processing	Granger, Paula	Architect	0.00	0.00	48.00	160.00	160.00	0.00	368.00
		Business Analyst	0.00	0.00	32.00	96.00	16.00	64.00	208.00
		Project Manager	0.00	0.00	80.00	0.00	0.00	32.00	112.00
		Total	0.00	0.00	160.00	256.00	176.00	96.00	688.00
		Application Change Total	0.00	0.00	160.00	256.00	176.00	96.00	688.00

Major Project

Project Name	Project Manager	Resource Role	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Total
Online Customer Release	Sutherland, Joy	Architect	0.00	160.00	80.00	0.00	48.00	24.00	312.00
		Business Analyst	0.00	120.00	40.00	0.00	168.00	24.00	352.00
		Developer	0.00	0.00	184.00	136.00	48.00	24.00	392.00
		Network Engineer	0.00	40.00	40.00	152.00	56.00	24.00	312.00
		Project Manager	0.00	160.00	0.00	0.00	168.00	24.00	352.00
		Storage Architect	0.00	40.00	120.00	0.00	48.00	24.00	232.00
		Test Engineer	0.00	0.00	0.00	152.00	56.00	24.00	232.00
		Total	0.00	520.00	464.00	440.00	592.00	168.00	2,184.00
Online Order Improvements	Thompson, Peter	Architect	176.00	128.00	40.00	0.00	32.00	0.00	376.00
		Business Analyst	176.00	128.00	40.00	0.00	152.00	0.00	496.00
		Developer	176.00	8.00	184.00	136.00	32.00	0.00	536.00
		Network Engineer	176.00	48.00	40.00	152.00	40.00	0.00	456.00
		Project Manager	176.00	168.00	0.00	0.00	152.00	0.00	496.00
		Storage Architect	176.00	48.00	120.00	0.00	32.00	0.00	376.00
		Test Engineer	176.00	8.00	0.00	152.00	40.00	0.00	376.00
		Total	1,232.00	536.00	424.00	440.00	480.00	0.00	3,112.00
Major Project Total		1,232.00	1,056.00	888.00	880.00	1,072.00	168.00	5,296.00	
Grand Total		1,232.00	1,056.00	1,048.00	1,136.00	1,248.00	264.00	5,984.00	

1.0113 Upcoming Milestones

Type: Grid Portlet

Source: PPM Essentials Accelerator v2.0

Query Used: Upcoming Project Milestones

The Upcoming Milestones portlet lists all the milestones coming due. Security on Projects. Displays stoplight on milestone schedule status. Displays on Project.

Upcoming Milestones

Due Date

to

Filter

Show All

Save Filter

Clear

Milestone Name

Due Date

1.0114 Upcoming Milestones

Type: Grid Portlet

Source: PMO Accelerator v3.0 (Enh. for v3.0)

Query Used: Upcoming Project Milestones

Upcoming Milestones

Finish

to

Filter

Show All

Save Filter

Clear

Milestone	Finish	Schedule %	Days Late	Gantt Schedule					
				Aug 12	Sep 12	Oct 12	Nov 12	Dec 12	Jan 13
Test Milestone	8/16/12	<div></div>	0	<div></div>					

Displaying 1 - 1 of 1

Query Used: System Provider: Team Allocations

Weekly Detail of Resource Allocations

Resource	<input type="text"/>	Role	<input type="text"/>
Resource OBS	<input type="text"/>	Project	<input type="text"/>
Resource OBS - Filter Mode	Unit only	Project Manager	<input type="text"/>
Resource Type	All	Project OBS	<input type="text"/>
Booking Status	All	Project OBS - Filter Mode	Unit only
Request Status	All	Approved	All
		Power Filter	[Build Power Filter]

Filter Show All Save Filter Clear

Resource		Role	Project	Allocation										
				8/13/12	8/20/12	8/27/12	9/3/12	9/10/12	9/17/12	9/24/12	10/1/12	10/8/12	10/15/12	
Q	Administrator, Niku		Demo Project 2	80.00	48.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	
Q	Administrator, Niku		Test Idea											
Q	B, Ryan		Doug's Move											
Q	Boston, City		Test of V13	24.00	40.00	40.00	40.00		40.00	40.00	40.00	40.00	40.00	
Q	Contractor, External		Doug's Move	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	60.00	
Q	Dolak, Jerry	Architect	Jerry Dolak iPad test project											
Q	Dolak, Jerry	Architect	Holiday											
Q	Dolak, Jerry	Architect	Test Idea											
Q	Dolak, Jerry	Architect	VFB IDEA APR-20 - 1	40.00	8.00									
Q	Dolak, Jerry	Architect	VFB - 1 - Open WorkBench	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	
Q	Dolak, Jerry	Architect	VFB Demo -1	40.00	8.00									
Q	Dolak, Jerry	Architect	VFB Demo -1											
Q	Dolak, Jerry	Architect	VFB - 2	40.00	8.00									
Q	Dolak, Jerry	Quality Engineer	Cooper Sub 1	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	
Q	Dolak, Jerry	Quality Engineer	Cooper Sub 2	40.00	40.00	40.00	40.00	40.00						
Q	Dolak, Jerry	Quality Engineer	Cooper Master 1	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	
Q	G, Doug		Doug's Move											
Q	G, Kathy		Doug's Move	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	48.00	
Q	Gallagher, Pete		Sample 7712345	40.00	8.00									
Q	Gallinger, Aaron	Business Analyst, Senior	Test Project	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	20.00	

<< Page 1 of 4 >>

Displaying 1 - 20 of 77