

myP3+ PPM Solution

Features, Screens and Power BI Report Extracts



FEATURES AND SCREEN EXTRACTS

PORTFOLIO HOME

Allows access to all initiatives based on user permissions. The user can filter the available initiatives to show only the ones relevant to their needs. A standard suite of fields provides quick reference to some of the initiatives' details.

Initiatives	PMO ID	Name	Type	Stage	Status	Parent
Risks	ID-1002	Community Center Redevelopment	Idea	0 - Concept	Pipeline-Brief Development	Community Portfolio
Issues	PF-1002	Community Portfolio	Portfolio	2 - Portfolio Delivery	Active	
Assumptions		Customer Relationship Mgt System	Project	1 - Initiation	Pipeline-Future Idea	
Constraints	PJ-1010	Cyber Security Software Implementation	Project	3 - Execution	Active	ICT Portfolio
Changes	PG-1001	Data Centre Improvements	Programme	1 - Identifying a Programme	Active	ICT Portfolio
Products	PJ-1008	Digital Dashboards	Project	3 - Execution	Active	ICT Portfolio
Quality Criteria	PJ-1005	eDRMS Project	Project	2 - Definition	Active	ICT Portfolio
Stakeholders	PJ-1001	Human Resource Information System (HRIS)	Project	2 - Definition	Active	ICT Portfolio
Benefits	PF-1001	ICT Portfolio	Portfolio	1 - Portfolio Definition	Active	
Actions		Invoicing System	Idea	0 - Concept	Pipeline-Future Idea	
Decisions	PJ-1009	iPad Rollout	Project	3 - Execution	Active	ICT Portfolio
Lessons	ID-1001	Inis Recognition System for Access Control	Project	1 - Initiation	Pipeline-Future Idea	ICT Portfolio
Notes		New System	Idea	0 - Concept	Pipeline-Future Idea	
Engagements	PJ-1003	O365 Roll Out	Project	3 - Execution	Active	ICT Portfolio
Agendas		Online Training System	Project	3 - Execution	Active	ICT Portfolio
Minutes	PJ-1004	Oracle EBS Project	Project	2 - Definition	Active	ICT Portfolio
Objectives		Park Upgrade	Work	2 - Closure	Active	Community Portfolio
Scope						
Options						
Mgt Plan Exceptions						
Tolerances						
Appraisals						
Prioritisations						
Contacts						

PORTFOLIO GLOBAL REGISTERS

Portfolio users can access central registers for all initiative-level controls to perform in-system analysis and quickly access information from multiple initiatives. The registers can be filtered to narrow the view of data for the user.

For example: Risks across all initiatives can be accessed and filtered by Category.

Initiatives	Initiative	ID	Event	Assignee	Rating	Status	Category	Due Date	Impacted Constraint	Current Step	Parent
Risks	iPad Rollout	R-001314	A partial rollout may be necessary		High	Active	Planning	19/03/2023	Time	1-Identify	
Issues	Cyber Security Software Implementation	R-001275	Additional software may be required		Medium	Active	Technical	6/07/2022	Cost: Time: Scope: Quality	1-Identify	
Assumptions	Human Resource Information System (HRIS)	R-001307	Additional system administration role may not be recruited in the budgeted 4 weeks.		Medium	Closed	Resourcing	15/03/2023	Time	1-Identify	
Constraints	Community Center Redevelopment	R-001265	Asbestos removal work may not be completed to schedule.	Project Manager	Medium	Active	Planning	28/06/2022	Time	4-Monitor	
Changes	Inis Recognition System for Access Control	R-001322	Biometric device functionality may not be compatible with building network and infrastructure		High	Active	Benefit	28/02/2023	Cost	1-Identify	
Products	Road Renewals Program	R-001396	Building Contractors lead times may be greater than planned		High	Active	Planning	20/03/2023	Time	1-Identify	
Quality Criteria	Park Upgrade	R-001356	Building contractors to carry out works may need long lead times		High	Active	Planning	20/01/2023	Time	1-Identify	
Stakeholders	Human Resource Information System (HRIS)	R-001306	Business Requirements may change for HR activities		High	Active	Benefit	31/03/2023	Scope	1-Identify	
Benefits	Online Training System	R-001338	Changes expected to industry Standards and compliance regulations may impact solution design		High	Active	Organisational	30/06/2023	Cost	1-Identify	
Actions											
Decisions											
Lessons											
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PROCESS HELP

myP3+ is equipped with process help screens that display relevant process guidance based on the screen currently being accessed.

For example: accessing this feature when on the Risk List screen will show you the process guidance on overall risk management.

Initiative	ID	Event	Assignee	Rating	Status	Category	Due Date	Impacted Constraint
iPad Rollout	R-001314	A partial rollout may be necessary		High	Active	Planning	19/03/2023	Time
Cyber Security Software Implementation	R-001275	Additional software may be required		Medium	Active	Technical	6/07/2022	Cost; Time; Scope; Quali
Human Resource Information System (HRIS)	R-001307	Additional system administration role may not be recruited in the budgeted 4 weeks.		Medium	Closed	Resourcing	15/03/2023	Time
Community Center Redevelopment	R-001265	Asbestos removal work may not be completed to schedule.	Project Manager	Medium	Active	Planning	28/06/2022	Time
Iris Recognition System for Access Control	R-001322	Biometric device functionality may not be compatible with building network and infrastructure		High	Active	Benefit	28/02/2023	Cost
Road Renewals Program	R-001396	Building Contractors lead times may be greater than planned		High	Active	Planning	20/03/2023	Time

For example: accessing this feature when on the Risk Form screen will show you the process guidance on the specific risk management step the user is currently at, such as what to do in the 'Analyse' step.

Probability	Consequence	1	2	3	4	5
1	20%	Low	Low	Low	Low	Low
2	40%	Low	Low	Low	Low	Low
3	60%	Low	Low	Medium	Medium	Medium
4	80%	Low	Low	Medium	High	High

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EXCEPTION HELP

myP3+ is equipped with exceptions help screens that display relevant data checks to consider based on the screen currently being accessed.

For example: accessing this feature when on the Risk List screen will show you the exceptions for risk due dates or next review date has passed.

Initiative	ID	Event	Assignee	Rating	Status	Category	Due Date	Impacted Constraint
iPad Rollout	R-001314	A partial rollout may be necessary		High	Active	Planning	19/03/2023	Time
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Road Renewals Program	R-001396	Building Contractors lead times may be greater than planned		High	Active	Planning	20/03/2023	Time

CONTROLS (REGISTERS) AND FORMS

myP3+ is equipped with various control registers such as: Risks, Issues, Assumptions, Constraints, Products (Deliverables), Quality, Changes, Benefits, Stakeholder, Lessons, Decisions, Actions and Notes, Stakeholder Analysis and meeting administration logs for Agendas and Minutes.

Each register can be displayed as a List and has an associated Form to enter / edit an item within the List. There is also a feature to relate items to one another.

For example: the Risk Register (List) displays key fields that the user can use to sort or filter items.

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Initiative	ID	Event	Assignee	Rating	Status	Category	Due Date	Impacted Constraint	Current Step	Parent
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Human Resource Information System (HRIS)	R-001306	Business Requirements may change for HR activities		High	Active	Benefit	31/03/2023	Scope	1-Identify	
Online Training System	R-001338	Changes expected to industry Standards and compliance regulations may impact solution design		High	Active	Organisational	30/06/2023	Cost	1-Identify	

For example: the Risk Form displays with tabs, each tab corresponds with the steps in the risk management process and the fields in each tab corresponds to the data that is captured when conducting that step in the process.

PMO ID	Name	Current Stage	Parent	Start	Finish	% Complete	% Work Complete	Forecast Cost
R/1512	Project Online Implementation	1-Initiation	ICT Portfolio	16/10/2022	21/10/2024	88	81	4,48,500

1-Identify
2-Analyse
3-Plan
4-Monitor
5-Learn

Parent Risk
Select...

Impacted Constraint
Scope X

Status
On Hold X

Reportable To
Project Board X Program Board X

Event
Conflicting project planned for the same period

Cause
Data centre relocation planned during project delivery phase

Impact
POL project may have to pause

Statement
Conflicting project planned for the same period because Data centre relocation planned during project delivery phase resulting in POL project may have to pause

For example: The Risk can be related to Actions, Lessons, and Products etc.

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Risks > R-001364 - Conflicting project planned for the same period

Items that have been related to the current Control Item are listed below. The association may be removed by using the X icon, or you may navigate to the Item using the > icon.

Type	ID	Name	Current Step	
Action	D-002736	Product Owner to confirm licence user count	1-Action	X
Lesson	D-002740	Staff details in AD were not grouped by business unit which impacte...	1-Lesson	X
Product	P-001855	Project Management Plan	2-Product-based Planning	X

Choose item type... Add New Link Existing

Risks > R-001364 - Conflicting project planned for the same period > Related Items

APPRAISALS

myP3+ is equipped with appraisals to assess initiatives based on specific criteria, these include Delivery Feasibility Appraisal, Strategic Value Appraisal and Stage Gate Appraisal.

Each appraisal can be updated to organisational specific criteria and new appraisals can be added.

For example: the Delivery Feasibility Appraisal lists questions and answers that together generate a delivery feasibility score for the initiative.

Appraisals > Ap-001252 - Delivery Feasibility Appraisal 1-Project Online Implementation

Appraisal Score Based on selected template and responses: 36

Appraisal Template: Delivery Feasibility Appraisal

Appraiser: Moneeta Sharma

Name: Delivery Feasibility Appraisal 1-Project Online Implementation

Appraisal Date: 12/06/2023

Appraisal Status: Approved

Notes: Some notes ...

Created On: June 20, 2023 9:35 AM

Indicative delivery resources required

- Up to 3
- 4 to 6
- 7 to 9
- 10 to 14
- 15 to 20
- Over 20

Notes...

Evidence Links

Indicative annual delivery cost

- Up to \$0.5M
- \$0.5M - \$2M
- \$2M - \$5M
- \$5M - \$20M
- \$20M - \$50M
- Over \$50M

Notes...

Evidence Links

Internal stakeholder engagement and participation matrix rating

- Assessed as Level 4 (Low impact) (Int Stakeholder)
- Assessed as Level 3 (Mid-low impact) (Int Stakeholder)
- Assessed as Level 2 (Mid-high impact) (Int Stakeholder)
- Assessed as Level 1 (High impact) or assessment incomplete (Int Stakeholder)

Notes...

Evidence Links

External stakeholder engagement and participation matrix rating

- Assessed as Level 4 (Low impact) (Ext Stakeholder)
- Assessed as Level 3 (Mid-low impact) (Ext Stakeholder)

Appraisals > Ap-001252 - Delivery Feasibility Appraisal 1-Project Online Implementation > Appraisal Item

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PRIORITISATION

myP3+ is equipped with a prioritisation module enabling the selection of initiatives for inclusion in the prioritisation process based on the Appraisals completed and the prioritisation based on Assessed and Agreed rankings.

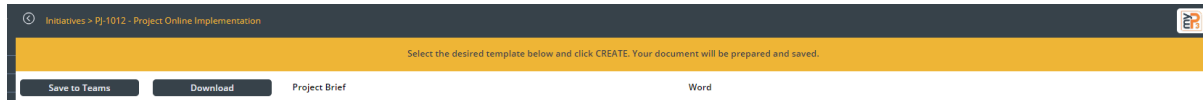
DOCUMENT GENERATION

myP3+ is equipped with a document generation module enabling generation of a document using data stored in the system at the click of a button.

For example: a Project Brief will be generated from data in myP3+ for the applicable initiative.

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INTEGRATIONS / INTERFACES

FINANCE SYSTEM (ACTUAL COSTS) INTEGRATION

Finance integration inserts actual expenditure data provided by the finance system into the schedule to allow full time-phased management and reporting of budget vs actuals and forecast expenditure. This approach differs to many other finance integrations for Project Online based solutions, where finance data is stored separately to the schedule (e.g. in a SharePoint list) and then combined with other project data through reporting.

This unified approach is to combine resource, cost and product time/task management reducing effort typically spent by PMO's in reconciling this information on a regular basis.

TIME RECORDING (ACTUAL WORK) INTEGRATION

The interface to external time recording systems is under development. myP3 has a vested interest in this feature as we will be using it for our own time recording system interface for our use of Venus.

Time integration inserts actual hours worked data provided by the time sheeting system into the schedule to allow full time-phased management and reporting of budget vs actuals and forecast work. This approach differs to many other time integrations for Project Online based solutions, where work data is stored separately to the schedule (e.g. in a SharePoint list) and then combined with other project data through reporting.

This unified approach is to combine resource, cost and product time/task management reducing effort typically spent by PMO's in reconciling this information on a regular basis.

MICROSOFT TEAMS INTEGRATION

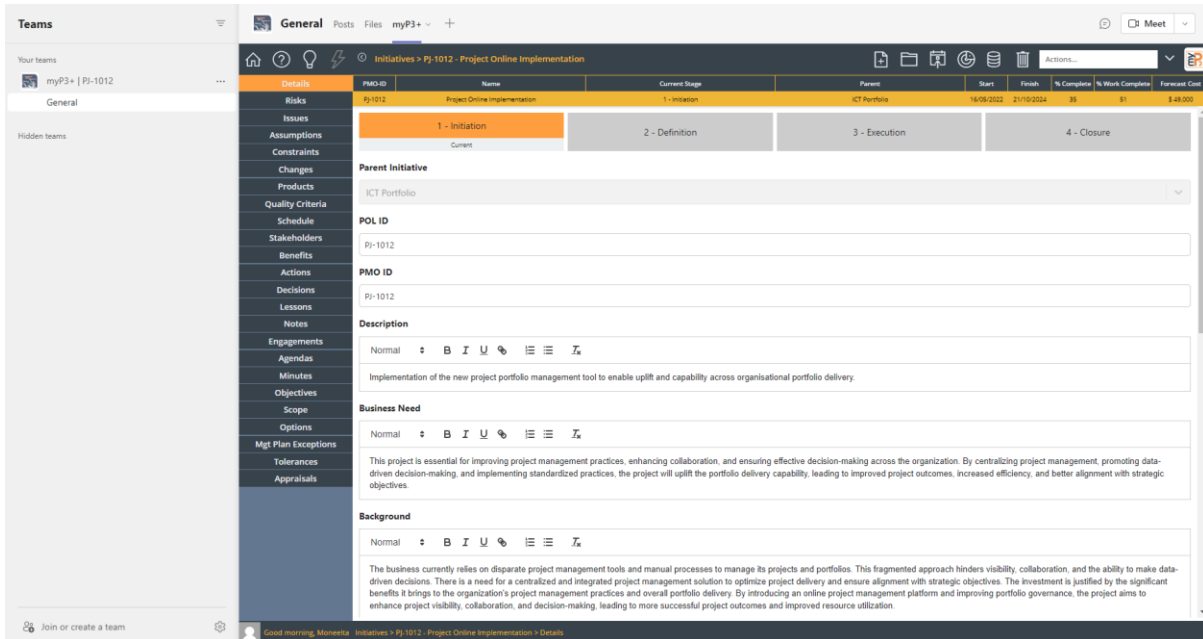
myP3+ is based on the MS Power Platform and can be accessed as a stand-alone application or accessed via MS Teams. This integration is loosely coupled to ensure minimal disruption when Microsoft released updates for either MS Teams or the MS Power Platform.

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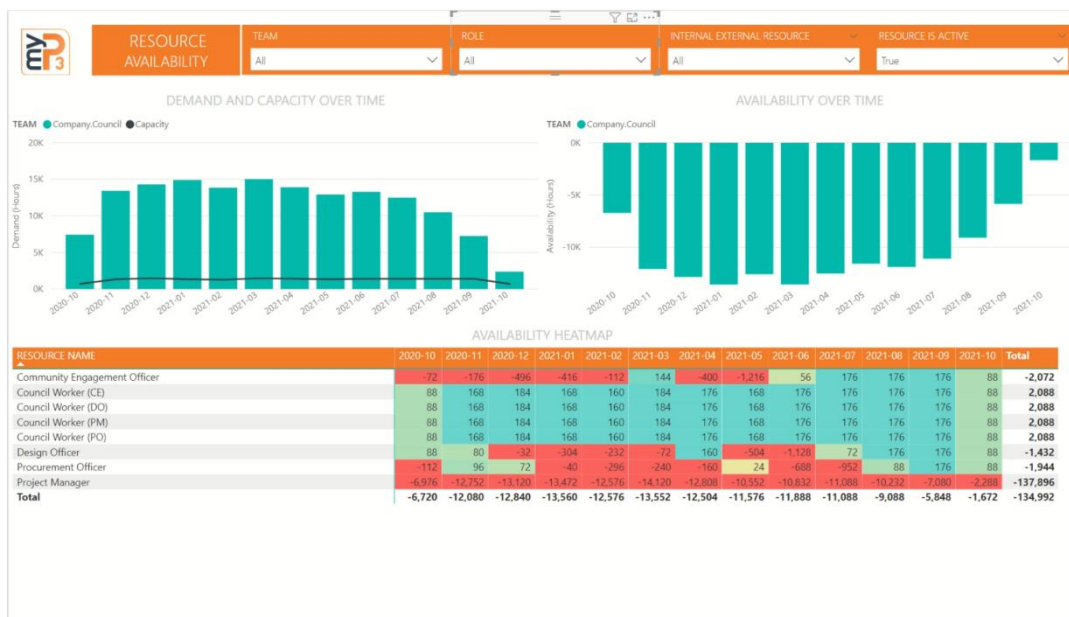


Documents are managed within MS Teams (Files), with each initiative having a separate team and file library. These can be made accessible to both internal and external users based on the security policies of the Microsoft tenancy used.



RESOURCE MANAGEMENT

The solution leverages the Project Online Resource Centre with additional supplementary dashboards to provide robust resource management capabilities that are integrated into schedules. The flexibility of this method allows for varying levels of granularity for resource management and holds this data consistently with the overall activity plan and financial information in a unified approach.



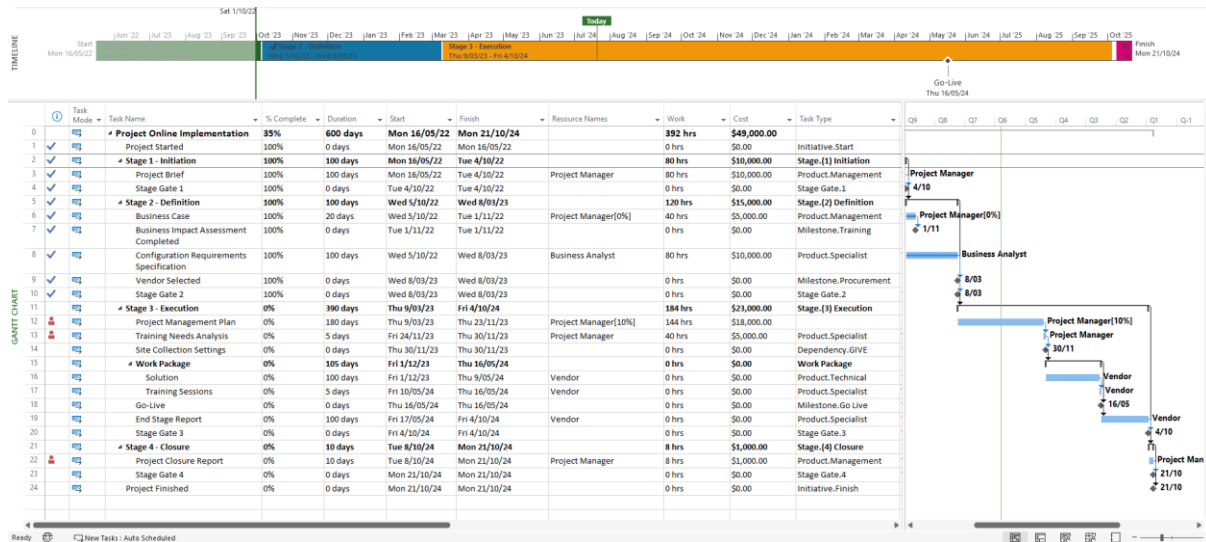
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SCHEDULE MANAGEMENT

The scheduling capabilities of this solution are provided by MS Project Online, with the schedule opening in MS Project Professional on the desktop when accessed. The schedule has included various 'tags & flags' to enable additional in schedule views and Power BI reports to better understand initiatives and their forward work plans. Note: The MS Project Professional Schedule is accessed from myP3+, the user does not interact with MS Project Online.



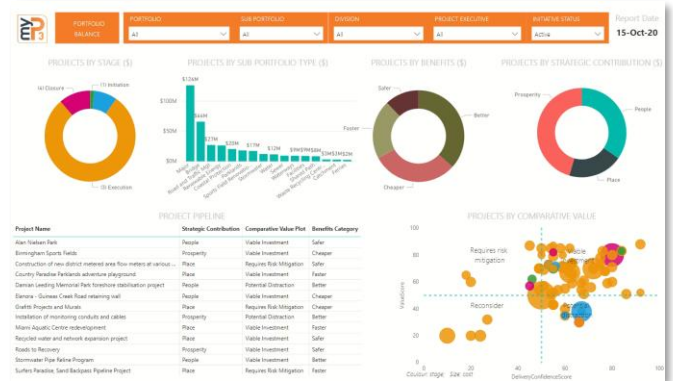
POWER BI REPORTS / DASHBOARDS EXTRACTS

myP3+ comes with a suite of out of the box Power BI Reports and Dashboards. Note: Data presented is not 'real' client data, this the below are mock-up scenarios for demonstration purposes only.

Master Schedule



Portfolio Balance & Prioritisation

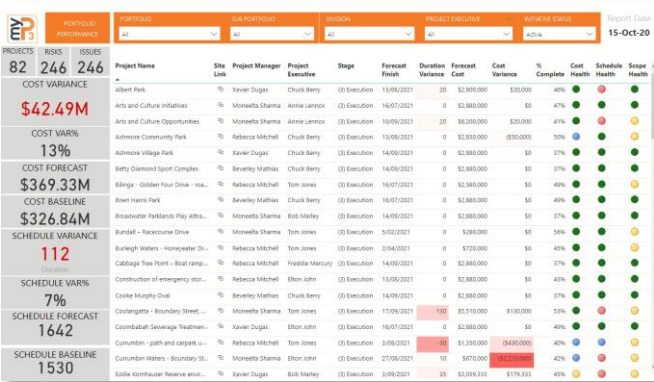


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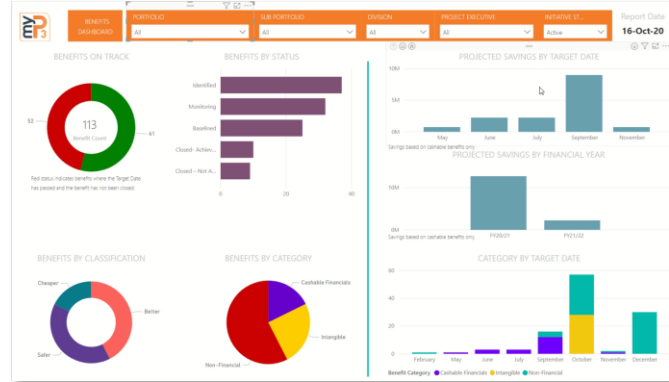
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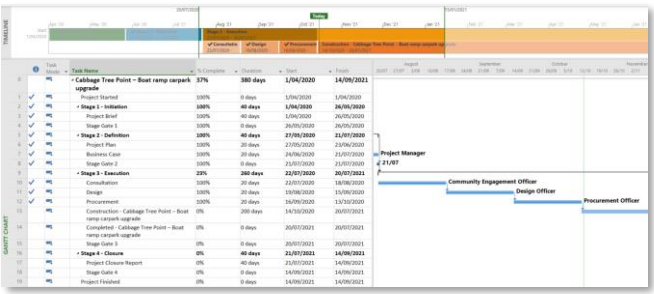
Portfolio Performance Dashboard



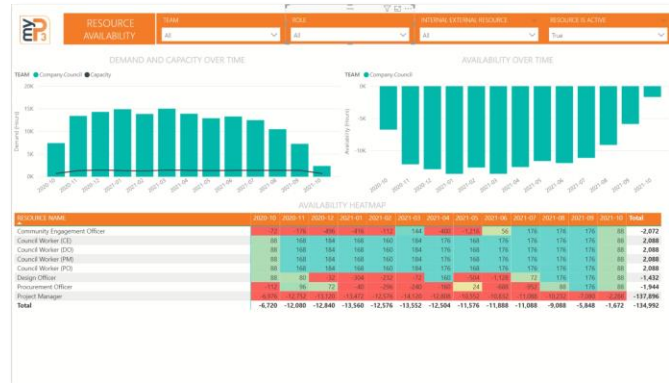
Benefits Management



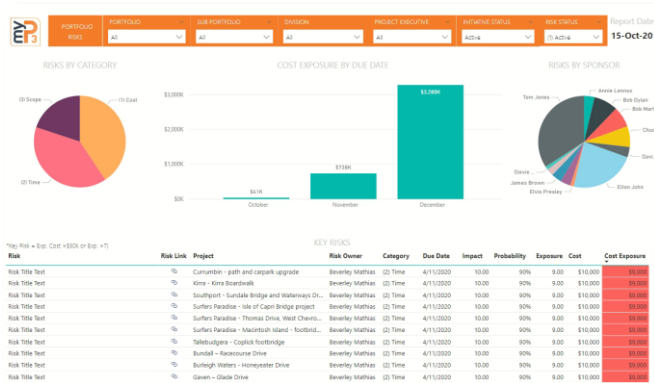
Scheduling



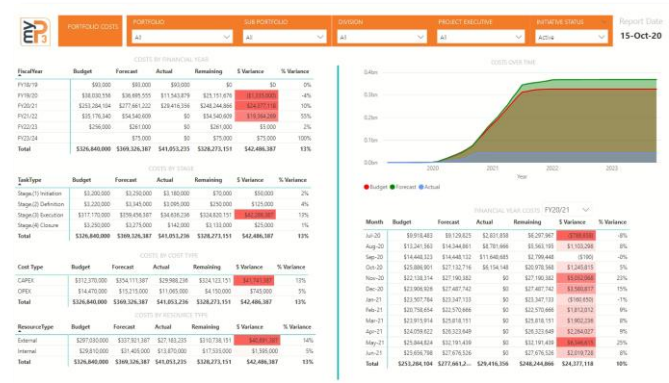
Resource Management



Risk / Issue Management



Financial Management

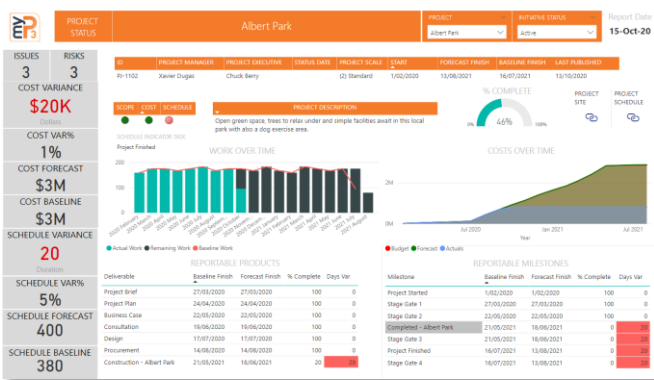


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Project Status Dashboard



Project Mapping to Geographical Locations

