



INSPIRE



ENGAGE



Dynamics 365 Project Operations

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EMPOWER

JOINED UP
SOLUTIONS



Scene setting / agenda

1. The session will demonstrate (live) out of the box & configured capabilities
2. Aligned to process (next slide)
3. I will demonstration as a single user
4. I can drill into configuration
5. This slide deck includes updated slides



Process

1. Create a project

- a. Digital Council reviews and approves

2. Project Initiation

- a. Budget planning
- b. Resource (capacity) allocation (based on availability & profile)

3. Project Delivery

- a. Detailed phasing plans/updating project plan
- b. Risks, issues, decisions, actions log
- c. Project Closure

4. Reporting/Dashboards

- a. Portfolio view- all projects, resources, budget, risks, issues, timelines
- b. Project view- RAG status, actions, risks, issues, budget, timeline, milestones, KPIs
- c. Team Leader view- team members' projects & capacity



Project

Key areas for presentation



Dashboard &
reports



Project lifecycle
management



Finance



Resources



Presentation demonstration - afterwards

Copies of the slides will be provided



Understand what is possible with Dynamics 365



How you can manage project lifecycles



Insights to improve management & decision support



Home page

Dynamics 365 Project Operations

Hide Chart | New Project | Delete | Refresh | Email a Link | Flow | Excel Templates | Export to Excel | Import from Excel | Create view

All Active Projects w/ RAG

Search this view

Project by Estimated Vs Actual cost

● Avg (Estimated Total Cost) (£) ● Sum (Actual Total Cost) (£)

Name	Customer	Overall Pro...	Start Date	Finish Date	Actual Start	Actual Finish	Effort (Hou...	Effort Com...	% Complete	Estimated T...	Av
AltaVista	Adventure Wor	Green	30/11/2020	25/12/202...	---	---	160.00	0.00	0.00	\$36,120.00	
Cream	Adventure Wor	Green	30/11/2020	08/01/202...	---	---	320.00	4.00	1.25	£48,160.00	£90.00
Easy	---	Red	30/11/2020	04/12/202...	---	---	80.00	0.00	0.00	£0.00	
EasyOff	Fabrikam Robo	---	30/11/2020	22/12/202...	---	---	88.00	0.00	0.00	\$33,020.00	
FABRIC	---	Green	30/11/2020	30/11/202...	---	---	0.00	0.00	0.00	£0.00	
Icecream	A Datum Corp	Green	04/01/2021	04/01/202...	---	---	0.00	0.00	0.00	£0.00	
Ingvar	---	Green	30/11/2020	06/04/202...	30/11/2020	---	736.00	0.00	0.00	£37,312.00	
Oscar	---	Green	29/11/2020	29/11/202...	---	---	0.00	0.00	0.00	£0.00	

1 - 8 of 8 (0 selected)



Project details

The screenshot displays the Dynamics 365 Project Operations interface for a project named "Cream". The interface includes a top navigation bar with various actions like Save, New Project, and Deactivate. A central "Project Stages" progress bar shows the project is currently in the "Deliver (44 Hrs)" stage, with previous stages "New", "Quote", and "Plan" completed. The main content area is divided into three panels: "General", "Estimates", and "Actuals".

Project Summary:

- Project Name: Cream
- Customer: Adventure Works
- Calendar template: Default Work Template
- Currency: British Pound
- Contracting Unit: Fabrikam UK
- Project Manager: Christopher Pond
- Overall Project Status: Green
- Status Updated On: 30/11/2020 14:12

Estimates:

Estimated Start Date	30/11/2020
Finish Date	08/01/2021 17:00
Effort (Hours)	320.00
Estimated Labor Cost	£33,160.00
Estimated Expense Cost	£15,000.00
Estimated Total Cost	£48,160.00

Actuals:

Actual Start	---
Actual Finish	---
Actual Labor Cost	£0.00
Actual Expense Cost	£90.00
Actual Total Cost	£90.00
Effort Completed (Hours)	4.00



Resource demand management

Dynamics 365 | Project Operations

Monthly view

Initial public view

Filter & Map View

Filter Map View

Schedule Assistant Filter

Search For: All resources

Work Location: Location Agnostic Available Duration: 320 hours

Radius: 20 mi/km

Search Start: 04/01/2021 9:00

Search End: 26/02/2021 17:29

Interval: 1 hour

Results Per Interval

Search

1 - 6 of 6

	January	February	March	April	May	June	July	August	September	October
AltaVista - Consul... Booked hrs: 0 / 320	0	160*	0	160*						
Alan Eardley 40:00 1%	160 hrs	160 hrs	144 hrs	176 hrs	168 hrs	176 hrs	176 hrs	176 hrs	176 hrs	168 hrs
Gay Gilmore 00:00 0%	160 hrs	160 hrs	184 hrs	176 hrs	168 hrs	176 hrs	176 hrs	176 hrs	176 hrs	168 hrs
Jill David 00:00 0%	160 hrs	160 hrs	184 hrs	176 hrs	168 hrs	176 hrs	176 hrs	176 hrs	176 hrs	168 hrs
Morgan Bird 00:00 0%	160 hrs	160 hrs	184 hrs	176 hrs	168 hrs	176 hrs	176 hrs	176 hrs	176 hrs	168 hrs
Summer Knight 00:00 0%	160 hrs	160 hrs	184 hrs	176 hrs	168 hrs	176 hrs	176 hrs	176 hrs	176 hrs	168 hrs
Ty Tinker 00:00 0%	160 hrs	160 hrs	184 hrs	176 hrs	168 hrs	176 hrs	176 hrs	176 hrs	176 hrs	168 hrs

Schedule Assistant - AltaVista - Consulting Lead

Name	AltaVista - Consulting Lead	Proposed Duration	0 min	Territory		Created On	01/12/2020 16:19
From Date	04/01/2021	Fulfilled Duration	0 min	Time From Promised			
To Date	26/02/2021	Remaining Duration	320 hrs	Time To Promised			
Duration	320 hrs	Priority		Status	Active		

Exit Search

0 / 320



Resource visibility

All Team Members + New Refresh Excel Templates

<input checked="" type="checkbox"/> Bookable Resource	Role	Resourcing Unit	Position Name	Start	Finish	Required Hours	Hard Book...	Total Effort (Ho...	Delete Status	Resource Requirement	Request Status (...
> Alan Eardley	Team Member	Contoso	Team Member 1	30/11/2020	11/12/2020	---	---	80.00	Not Pending	---	---
> Christopher Pond	Project Manager	Contoso	Project Manager 1	21/12/2020	25/12/2020	---	---	40.00	Not Pending	---	---
> Gay Gilmore	Consulting Lead	Fabrikam US	Consulting Lead 1	30/11/2020	18/12/2020	---	8.00	120.00	Not Pending	---	---
> Allison Dickson	Account Manager	Contoso	Account Manager 1	28/12/2020	08/01/2021	---	144.00	80.00	Not Pending	---	---

Refresh Group By Resource < Previous > Next Time Scale Week

Task	Role	Start Date	End Date	Quantity	Unit Group	Unit	Add Column	29/11/2020	06/12/2020	13/12/2020	20/12/2020	27/12/2020	03/01/2021	10/01/2021
Gay Gilmore (3)				120.00				40.00	40.00	40.00				
Create	Consulting	11/30/2020	12/04/2020	40.00	Time	Hour		40.00						
Select	Consulting	12/07/2020	12/11/2020	40.00	Time	Hour			40.00					
Plan	Consulting	12/14/2020	12/18/2020	40.00	Time	Hour				40.00				
Christopher Pon...				40.00							40.00			
Manage	Project Mar	12/21/2020	12/25/2020	40.00	Time	Hour					40.00			
Allison Dickson ...				80.00								40.00	40.00	
Measure	Account Mi	12/28/2020	01/08/2021	80.00	Time	Hour						40.00	40.00	
Alan Eardley (1)				80.00				40.00	40.00					
Deployment	Team Meml	11/30/2020	12/11/2020	80.00	Time	Hour		40.00	40.00					
				320.00				80.00	80.00	40.00	40.00	40.00	40.00	0.00



Capture costs

Dynamics 365 | Project Operations

Save Save & Close + New Project Copy Project Deactivate Book Delete Refresh Project Totals Refresh Process Share Email a Link Flow Word Templates

Cream
Project

08/01/2021 17:00 Due Date £33,160.00 Estimated Labor Cost 0.21 Cost Consumption % 1.25 Progress %

Project Stages
Active for 46 hours

New Quote Plan **Deliver (44 Hrs)** Complete Close

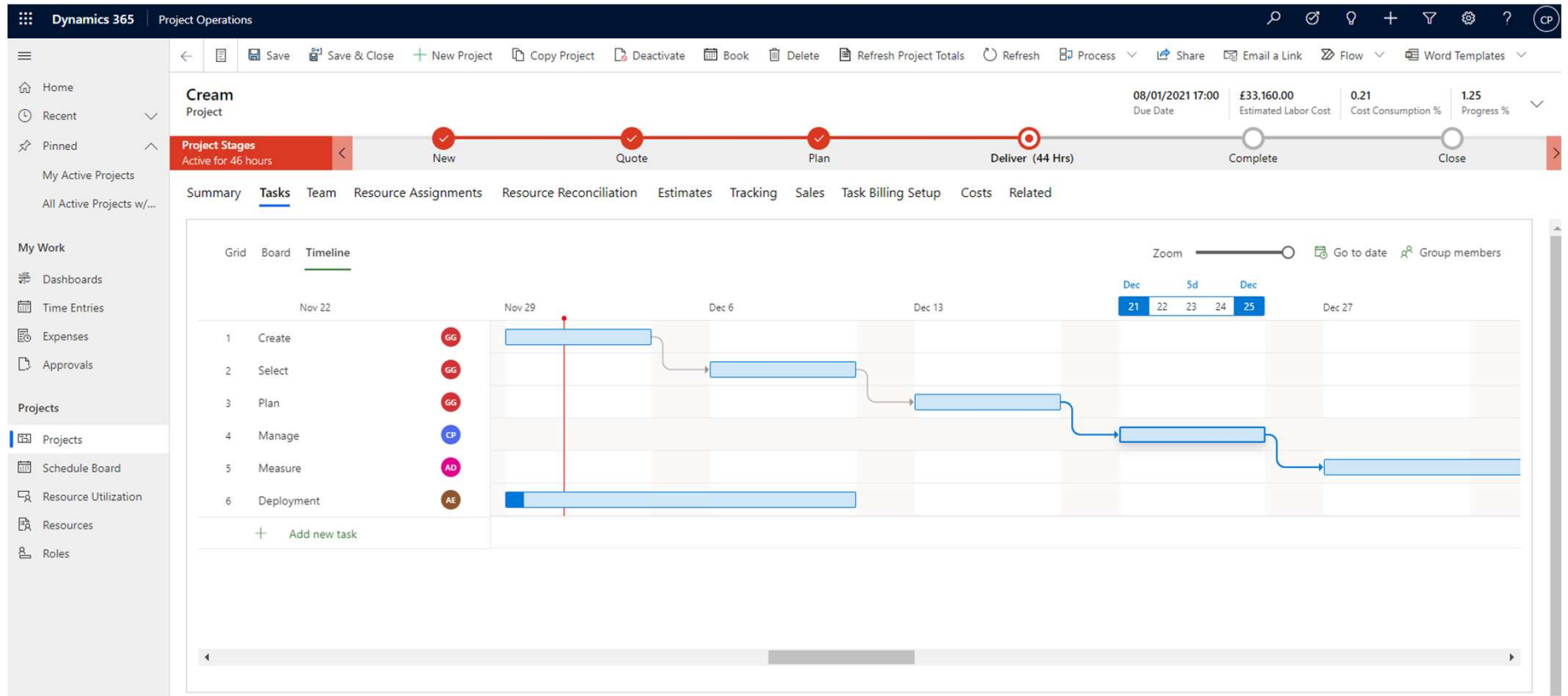
Summary Tasks Team Resource Assignments Resource Reconciliation Estimates Tracking Sales Task Billing Setup **Costs** Related

Refresh + Add Expense Estimate Delete Expense Estimate

Task	Category	Start Date	Quantity	Unit Group	Unit	Unit Cost Price	Unit Sales Price	Total Cost Price	Total Sales Price
Manage	Miscellaneous	11/30/2020	1.00	Default Unit	Primary Unit	10,000.00	£10,000.00	10,000.00	£10,000.00
Deployment	Hardware	12/02/2020	1.00	Default Unit	Primary Unit	5,000.00	£6,000.00	5,000.00	£6,000.00
								15,000.00	£16,000.00



Schedule with dependencies





Dynamic365 further configured

Capture risk, issue and other data.

AMBT
PID

Implementation
PID Status

Div Of Med & Integrated Care
Owner

PID BPF
Active for 6 months

Opportunity Plan In Progress Fully Developed Implementation Closure (13 D)

General Estimates Finance Summary (auto calculated) Finance Detail Interdependencies Risks Issues Project Timeline Approvals QIA EIA DPIA Related

PID Name	* AMBT	Project Manager	* Aafreen Shaffiudeen
PID Reference	ICT-2020-0002	SRO	---
PID Type	* Cost Improvement Programme	Finance Business Partner	---
Division	Div Of Med & Integrated Care	Trust Theme	ICT
Directorate	Integrated Care	QIA Required?	Yes
Speciality	---	EIA Required?	Yes
NHSi Category	Other Savings Plans	DPIA Required?	Yes

PID Summary

- * A steering group will be set up to review non-pay spend and will aim to reduce costs by seeking best value. Initial work streams will include the projects to improve quality and reduce costs in the following areas:
 - 1) HD Consumables (mitigate cost pressure)
 - 2) Home Dialysis Installation (single plumbing contract)
 - 3) Kidney Perfusion (case to reduce cost of consumables)
 - 4) PD Purchasing (Renew contract to reduce costs)
 - 5) Sample Transportation (Change provider to NWL to reduce costs and double charging)

What will be different/better? State specifically the quantitative and qualitative benefits and changes that the PID will realise.

1. Patients: More allocated theatre time will allow us to reduce waiting times for patients and increase their likelihood of starting dialysis with "native" access (AVF) which is seen as best practice
2. Efficiency: Starting with AVF vascular access first, rather than after a central venous catheter (CVC) being fitted prevents 'reworking' so allows more efficient allocation of clinical time

Active | unsaved changes | Save

Dashboard & Reports

PORTFOLIO DASHBOARD

DEPARTMENT:
 PROJECT TYPE:
 PROJECT OWNER:
 GOVERNANCE PHASE:

PROJECT COUNT
39

PROJECT COST
6M
LOCAL CURRENCY

COST VARIANCE
459K
LOCAL CURRENCY

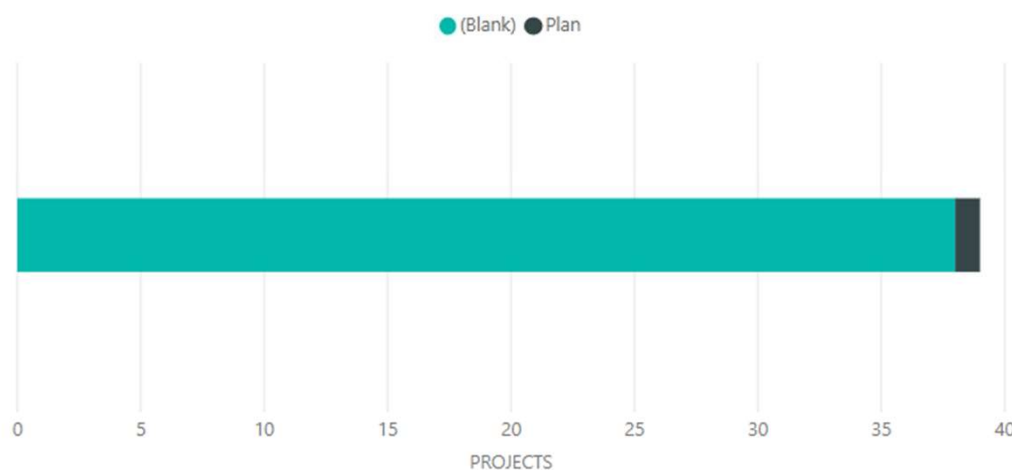
PROJECT WORK
74K
HOURS

WORK VARIANCE
14.08K
HOURS

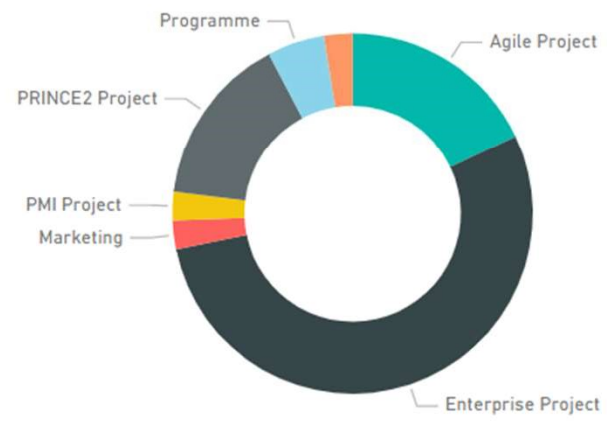
RISKS COUNT
28

ISSUES COUNT
61

PROJECTS BY GOVERNANCE PHASE



PROJECTS BY TYPE



PROJECT NAME	PROJECT OWNER	START DATE	FINISH DATE	COST	COST HEALTH	WORK HEALTH	SCHEDULE HEALTH	% COMPLETE
Business 2020	Duncan Griffin	22-May-18	09-Jul-18	36,080	●	●	●	0 %
Test Chris	Chris Aslett	26-Sep-18	26-Oct-18	0	●	●	●	0 %
3D Printer Development	Phillippa Ritchie	07-Mar-18	02-Apr-19	144,073	●	●	●	40 %
Acquisition Target Analysis	Ivan Lloyd	11-Dec-16	24-May-18	297,345	●	●	●	44 %
Agile Product Development	Ivan Lloyd	10-Jul-17	03-May-40	566,610	●	●	●	17 %
ArrowHead Flowshare	Duncan Griffin	19-Jul-17	18-Jun-18	428,160	●	●	●	25 %
Arrowhead Flowshare installation	Ivan Lloyd	31-Jul-17	12-Apr-18	191,647	●	●	●	12 %
Audit Tracking	Paul Mather	15-Nov-17	24-Dec-19	274,255	●	●	●	28 %
Automated Software Installation	Ada Andersen	06-Nov-17	12-Nov-18	583,560	●	●	●	28 %
Big Data Analytics	Lester Lovelock	04-Jun-18	13-Sep-18	41,360	●	●	●	0 %
Crazy Electronics	Chris Aslett	18-Sep-17	09-Apr-18	46,560	●	●	●	10 %
Customer Service Feedback Portal	Phillippa Ritchie	03-Nov-17	14-Jun-18	416,740	●	●	●	86 %

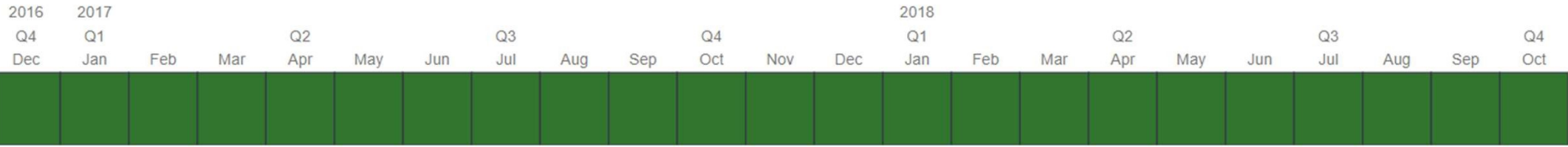
TIMELINE

DEPARTMENT:
 PROJECT TYPE:
 PROJECT OWNER:
 GOVERNANCE PHASE:

Y Q M W D
Month

Dec 2016 - Oct 2018

PROJECT START DATE



● Agile Project
 ● Enterprise Project
 ● Marketing
 ● PMI Project
 ● PRINCE2 Project
 ● Programme
 ● PS+ Workflow Controlled

Project Name	Start Date	End Date	Resource
Office 2016 rollout prep	Jan 2017	Jul 2017	
Office365	Jan 2017	Jul 2017	
ServiceDesk_Test_testforLongProjec...	Jan 2017	Jul 2017	
SharePoint 2013 Migration	25/09/2017 08:00:00	07/06/2018 08:00:00	John Glover
Sigma Product Development	Aug 2017	May 2018	Ada Andersen
Skype for Business Rollout	Dec 2017	Apr 2018	Lee Mather
Test Chris	Jan 2017	Jul 2017	
Trackball Deployment	Aug 2017	May 2018	William Wright
Training Gap Analysis and Rollout	Jan 2018	Apr 2018	Lester
Upgrade Billing System	Dec 2017	Apr 2018	Ivan Lloyd

Legend
Enterprise Project
 Task: SharePoint 2013 Migration
 Start Date: 25/09/2017 08:00:00
 End Date: 07/06/2018 08:00:00
 Duration: 255 Days
 % Completion: 100%
 Resource: John Glover

COSTS

DEPARTMENT

All

PROJECT TYPE

Enterprise Project

PROJECT OWNER

All

GOVERNANCE PHASE

All

COST KPI

At least 20% over baseline cost



Less than 10% over baseline cost



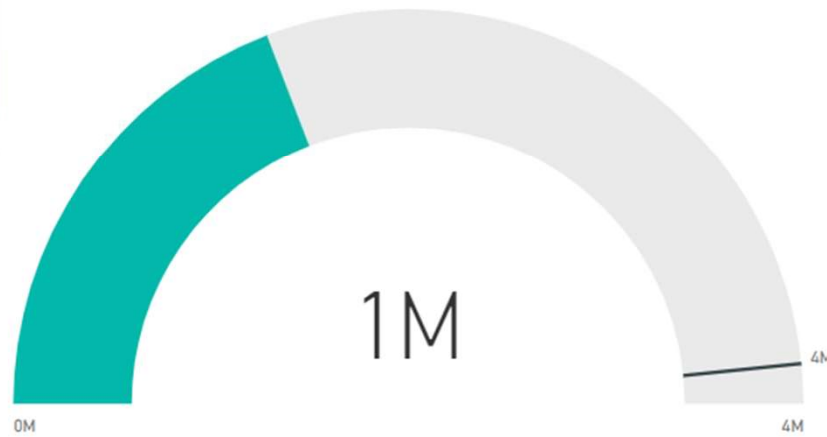
No Baseline



TOP PROJECTS BY COST

Automated Software Installation			
533,170	583,560	145,634	50,390
BASELINE COST	EAC (COST)	ACTUAL COST	COST VARIANCE
Customer Service Feedback Portal			
399,340	416,740	357,940	17,400
BASELINE COST	EAC (COST)	ACTUAL COST	COST VARIANCE
New Dynamics 2016 CRM System			
405,910	405,910	33,550	0
BASELINE COST	EAC (COST)	ACTUAL COST	COST VARIANCE

PORTFOLIO COSTS



PROJECT COST

4M

LOCAL CURRENCY

BASELINE COST

4M

LOCAL CURRENCY

ACTUAL COST

1M

LOCAL CURRENCY

COST VARIANCE

36.38K

LOCAL CURRENCY

COST HEALTH > PROJECT > COST TYPE	BUDGET COST	BASELINE COST	EAC (COST)	ACTUAL COST	REMAINING COST	COST VARIANCE
	0		1,000	0	1,000	0
ServiceDesk_Test_testforLongProjectNamesInTheTSSIGNoff	0		1,000	0	1,000	0
	0	90,080	274,255	77,455	196,800	165,255
Audit Tracking	0	90,080	274,255	77,455	196,800	165,255
	0	3,344,472	3,456,827	1,231,573	2,225,254	271,145
IT Change Programme	0	119,800	95,120	80,528	14,592	-24,680
Sigma Product Development	0	319,442	319,442	72,340	247,102	-23,200
Big Data Analytics	0	41,360	41,360	0	41,360	0
edison365 Introduction	0	52,960	52,960	28,960	24,000	0
Exchange Online Migration	0	20,040	20,040	0	20,040	0
Global IT Rollout	0	13,200	13,200	0	13,200	0
HR Flowchart Design	0	50,270	50,270	6,468	43,802	0
Merck Design Build subproject	0	7,800	7,800	300	7,500	0
Microsoft Exchange Online migration	0	213,840	213,840	0	213,840	0
New Dynamics 2016 CRM System	0	405,910	405,910	33,550	372,360	0
New Power Bi Reports	0	4,620	4,620	0	4,620	0
Total	0	3,434,552	3,732,082	1,309,028	2,423,054	436,400

RISKS

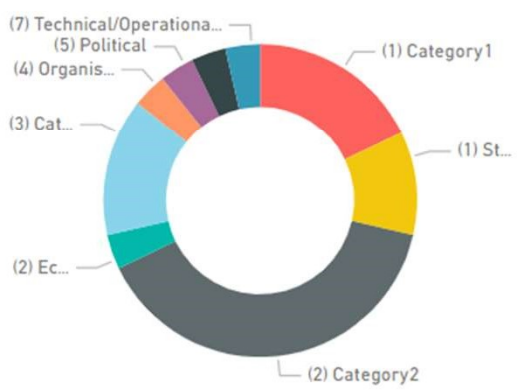
DEPARTMENT: All

PROJECT TYPE: All

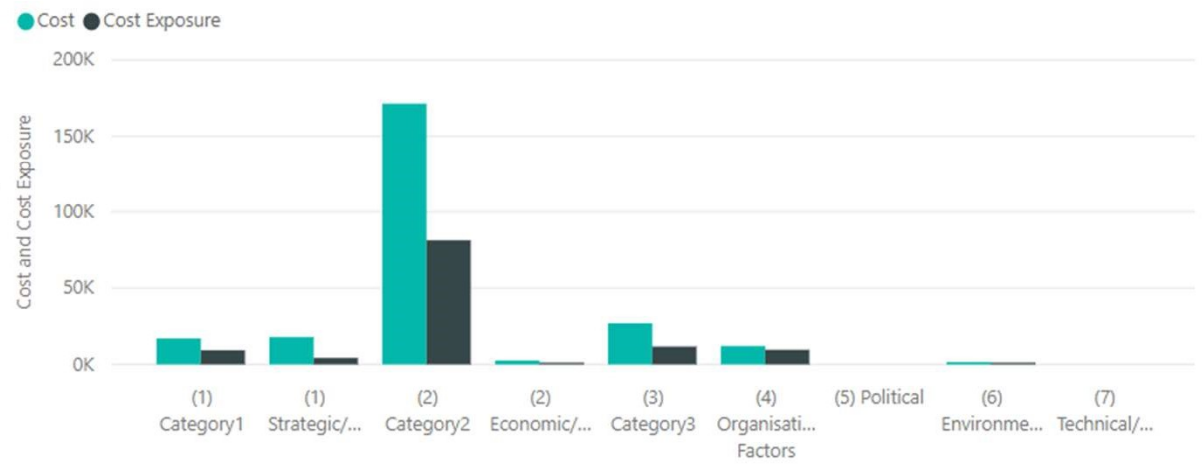
PROJECT OWNER: All

GOVERNANCE PHASE: All

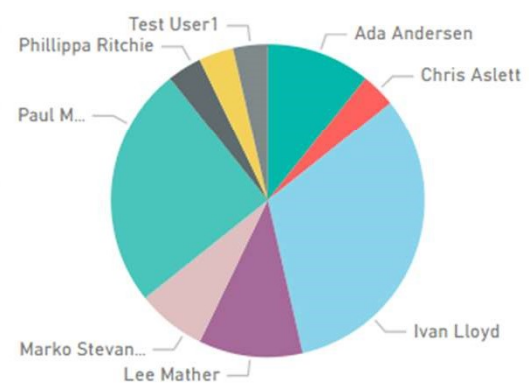
RISKS BY CATEGORY



RISK COST VS COST EXPOSURE



RISKS BY PROJECT OWNER

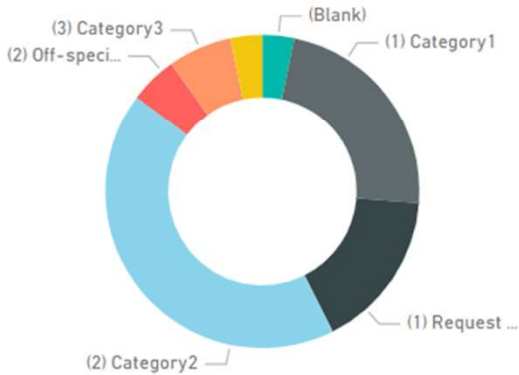


RISK	PROJECT	ASSIGNED TO	CATEGORY	DUE DATE	COST	COST EXPOSURE	PROBABILITY
Printing services fail to deliver	3D Printer Development	Lester Lovelock	(1) Strategic/Commerc...	30-Jun-17	7,900	0	0 %
Current innovation platform insufficient	Acquisition Target Analysis	Theo Verkaart	(1) Strategic/Commerc...	23-Jun-17	5,000	1,500	30 %
Customer acceptance	Acquisition Target Analysis	Theo Verkaart	(1) Strategic/Commerc...	23-Jun-17	5,000	2,750	55 %
Data supplier reliability	Acquisition Target Analysis	Ada Andersen	(2) Economic/Financi...	18-May-17	2,500	250	10 %
Hire Change Management expertise	Acquisition Target Analysis	Theo Verkaart	(4) Organisational/Ma...	20-Jul-17	12,000	9,600	80 %
Mailbox not accessible	Acquisition Target Analysis	Lee Mather	(7) Technical/Operatio...	30-Jun-17		0	90 %
Scope creep	Acquisition Target Analysis	Theo Verkaart	(5) Political	28-Jul-17		0	60 %
Specification Design could be misunderstood	Acquisition Target Analysis	Theo Verkaart	(6) Environmental	23-Jun-17	1,500	900	60 %
Delay in Specification Design	Audit Tracking	Chris Aslett	(1) Category1			0	0 %
End user Training	Audit Tracking	Lester Lovelock	(2) Category2		8,500	2,125	25 %
High development & Testing costs	Audit Tracking	Harjit Gill	(1) Category1		7,000	5,250	75 %
Total					249,300	117,250	

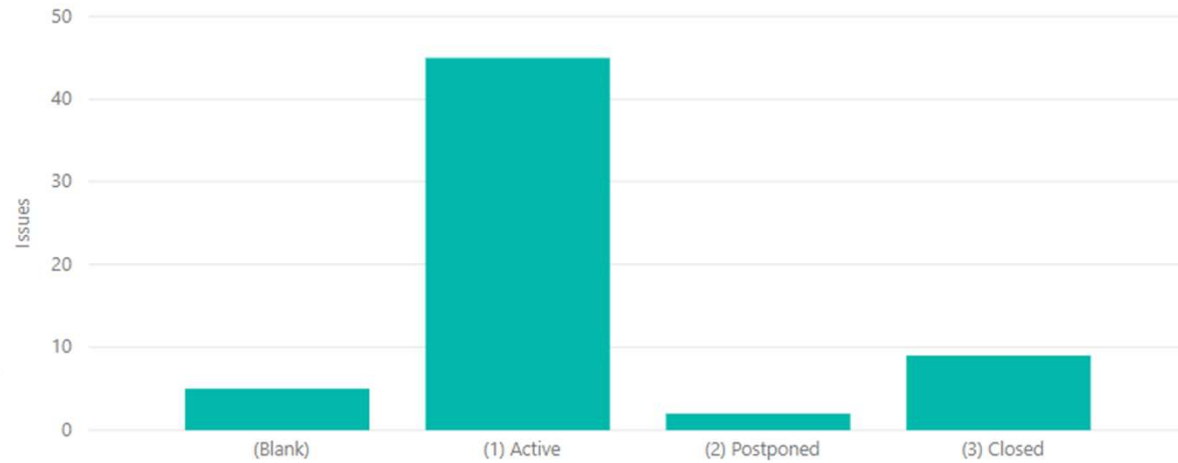
ISSUES

DEPARTMENT: All | PROJECT TYPE: All | PROJECT OWNER: All | GOVERNANCE PHASE: All

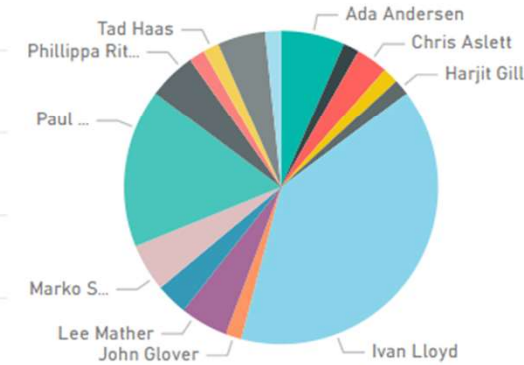
ISSUES BY CATEGORY



ISSUE COUNT BY STATUS



ISSUES BY PROJECT OWNER



ISSUE	PROJECT	ASSIGNED TO	DUE DATE	CATEGORY	PRIORITY	STATUS
App templates are not living up to high quality standard	Mobile app for SharePoint Online Agile Management			(1) Category1	(2) Medium	(1) Active
Budget reduction	IT Change Programme	Ivan Lloyd		(2) Category2	(1) High	(1) Active
capacity issues	Object Storage Software			(2) Category2	(2) Medium	(1) Active
Chosen portal no longer supported	Customer Service Feedback Portal			(2) Category2	(2) Medium	(1) Active
Code issue	Automated Software Installation			(2) Category2	(2) Medium	(1) Active
Cross platform issues	New Mobile App			(2) Category2	(2) Medium	(1) Active
Data loading issue	Big Data Analytics			(2) Category2	(2) Medium	(1) Active
Delay in Specification Design	Audit Tracking	Chris Aslett		(2) Category2	(2) Medium	
End user Training	Audit Tracking	Lester Lovelock		(1) Category1	(2) Medium	(3) Closed
End user Training	Audit Tracking	Lester Lovelock		(1) Category1	(2) Medium	
Feature detail below spec	Mobile app for SharePoint Online Agile Management			(1) Category1	(2) Medium	(1) Active
High development & Testing costs	Audit Tracking	Harjit Gill		(3) Category3	(2) Medium	(1) Active
High development & Testing costs	Audit Tracking	Harjit Gill		(1) Category1		

AVAILABILITY

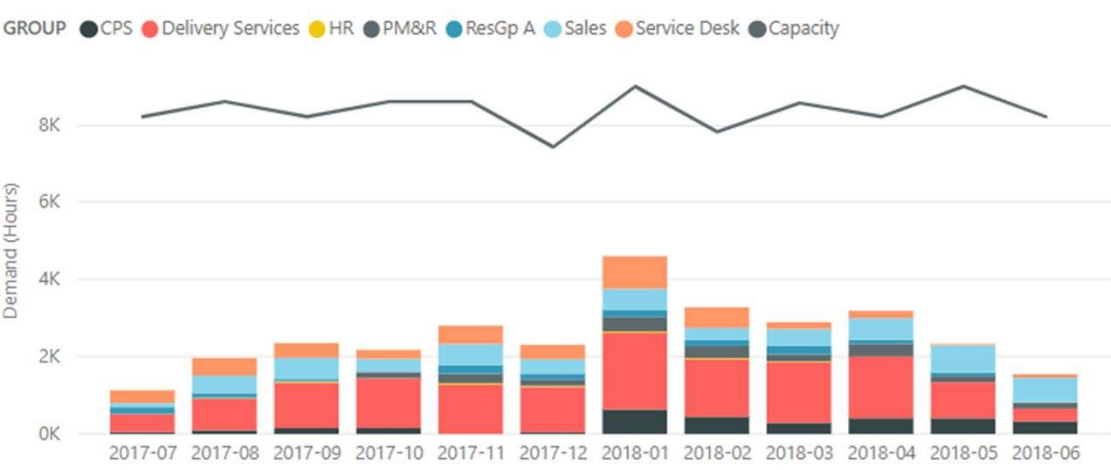
DEPARTMENT: All

GROUP: All

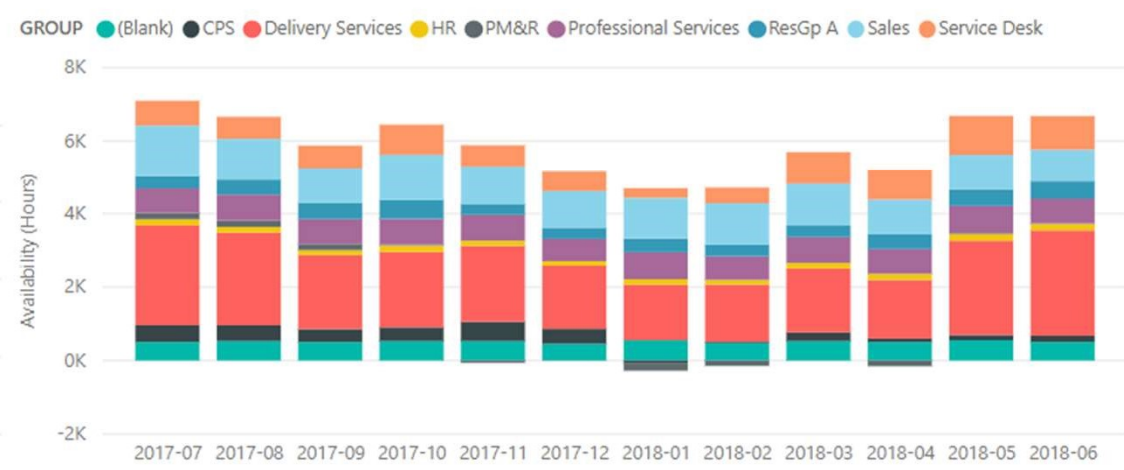
RESOURCE CALENDAR: All

RBS: All

DEMAND AND CAPACITY OVER TIME



AVAILABILITY OVER TIME



AVAILABILITY HEATMAP

RESOURCE NAME	2017-07	2017-08	2017-09	2017-10	2017-11	2017-12	2018-01	2018-02	2018-03	2018-04	2018-05	2018-06	Total
David Carey	40	-120	-216	-52	-148	-164	-184	-125	0	-24	147	77	-769
Paul Busby	136	16	32	-168	-152	-144	72	160	48	-14	-180	-17	-211
David J Dunning	168	176	168	176	176	132	-418	-288	0	-75	-219	-105	-109
Theo Verkaart	168	176	168	24	-64	-12	-196	-147	-5	-155	27	21	5
Ertan Ates	112	0	0	124	28	0	-418	-248	0	131	184	168	81
Aquila Sands	168	56	-48	0	-80	40	176	160	1	-64	0	95	504
John Glover	136	72	80	160	96	132	0	-40	0	0	0	107	743
Sam Graber	8	-11	-27	-52	129	114	140	128	138	83	33	95	777
Lester Lovelock	168	176	160	85	16	8	0	0	-40	0	167	168	908
Richard Baldwin	112	176	88	176	176	132	0	-40	0	0	0	132	952
Lee Mather	168	110	83	40	61	122	-39	96	-24	48	184	168	1,017
Kid Rock	168	176	168	172	28	0	0	0	-22	64	114	168	1,035
Derek Strachan	168	176	8	168	168	152	32	0	-95	-65	168	168	1,048
Marko Stevanovic	168	176	168	176	164	80	-33	-7	-75	-35	168	168	1,118
Ivan Lloyd	120	80	16	24	176	128	184	160	61	0	179	111	1,239
Chris Aslett	168	176	112	152	176	152	88	160	96	72	53	-117	1,288
Total	7,100	6,662	5,878	6,449	5,823	5,142	4,417	4,565	5,694	5,046	6,687	6,685	70,150

ASSIGNMENTS

DEPARTMENT

All

GROUP

All

RESOURCE CALENDAR

All

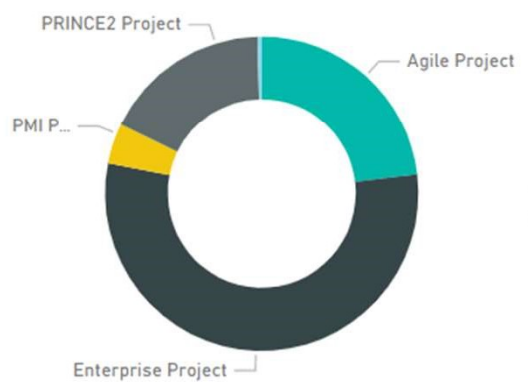
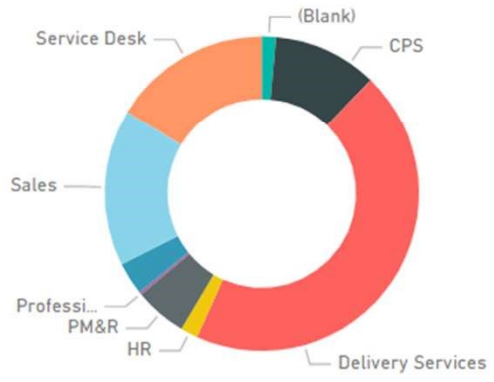
RBS

All

WORK BY GROUP > RESOURCE

WORK BY PROJECT TYPE > PROJECT

ASSIGNMENT ACTUAL AND REMAINING WORK BY PROJECT TYPE



RESOURCE > PROJECT > TASK

RESOURCE	START	FINISH	% WORK COMPLETE	WORK
Chris Aslett	23-Jun-16	27-Jun-18	42.11	824
Automated Software Installation	23-Jun-16	27-Jun-18	0.00	304
Mobile app for SharePoint Online Agile Management	15-Sep-17	09-Oct-17	100.00	96
Acquisition Target Analysis	05-Jan-18	16-Mar-18	0.00	176
New Dynamics 2016 CRM System	02-Apr-18	27-Jun-18	40.00	248
David J Dunning	23-Jun-16	28-Sep-18	0.00	2,318
Automated Software Installation	23-Jun-16	02-Jul-18	0.00	584
SharePoint 2013 Migration	27-Dec-17	07-Jun-18	0.00	968
Arrowhead Flowshare installation	11-Jan-18	22-Feb-18	0.00	646
Merck Design Build subproject	10-Sep-18	28-Sep-18	0.00	120
Paul Busby	23-Jun-16	08-Nov-19	24.07	3,320
Automated Software Installation	23-Jun-16	12-Nov-18	0.00	1,104
Acquisition Target Analysis	10-Mar-17	10-May-17	100.00	208
edison365 Introduction	12-Jul-17	19-Dec-17	50.00	512
ArrowHead Flowshare	03-Aug-17	13-Jun-18	29.51	1,088
Audit Tracking	31-May-18	08-Nov-19	20.00	408
Paul Mather	12-Sep-16	15-Aug-18	50.79	1,413
Total	23-Jun-16	03-May-40	31.90	47,941

RESOURCE NAME

- Select all
- Ada Andersen
- Alan Eardley
- Aquila Sands
- Chris Aslett
- Chris Edwards
- David Carey
- David J Dunning
- Derek Strachan
- Duncan Griffin
- Ertan Ates
- Eugene Herald
- Harjit Gill
- Ivan Lloyd
- John Glover
- Kid Rock
- Lee Mather
- Lester Lovelock
- Marko Stjepanovic

PROJECT STATUS

Acquisition Target Analysis

PROJECT
Acquisition Target Analysis

SCHEDULE VARIANCE

4
DAYS

WORK VARIANCE

16
HOURS

COST VARIANCE

8,480
LOCAL CURRENCY

PROJECT COST

297K
LOCAL CURRENCY

PROJECT WORK

2,893
HOURS

ISSUES COUNT

16

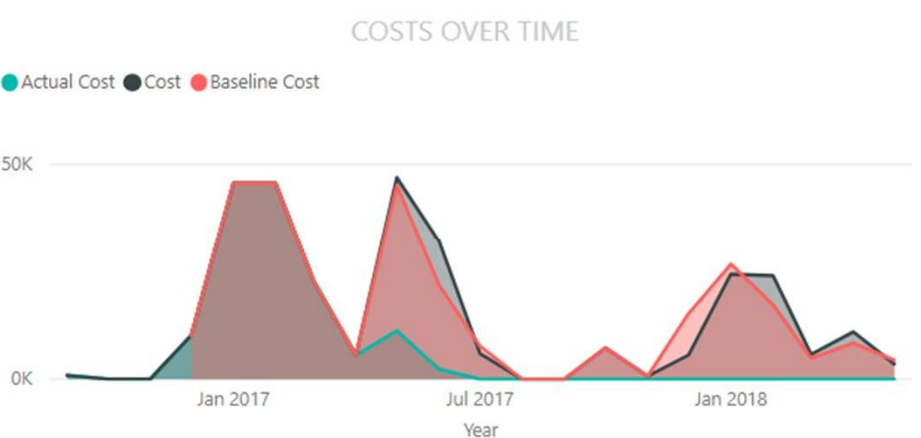
RISKS COUNT

7

COST	WORK	SCHEDULE	PROJECT MANAGER	STATUS DATE	PROJECT TYPE	START	FINISH	BASLINE FINISH	LAST PUBLISHED
●	●	●	Ivan Lloyd		PRINCE2 Project	11-Dec-16	24-May-18	18-May-18	08-Jun-18

PROJECT DESCRIPTION

Investigation and comparison of target companies for potential acquisition The project will identify a maximum of 6 companies from the competitor landscape and then undertake a detailed analysis of strengths, weaknesses, opportunities and threats on each as well as where appropriate providing initial value estimations and benefits of acquisition.



COMPLETED MILESTONES

MILESTONE	FINISH DATE	BASELINE FINISH	FINISH VARIANCE
Scope complete	04-Jan-17	04-Jan-17	0
Analysis complete	09-Feb-17	09-Feb-17	0
Discovery Complete	09-Feb-17	09-Feb-17	0
Design Complete	08-Mar-17	08-Mar-17	0
Develop training specifications f...	08-Mar-17	08-Mar-17	0
Develop training specifications f...	08-Mar-17	08-Mar-17	0

UPCOMING MILESTONES

MILESTONE	FINISH DATE	BASELINE FINISH	FINISH VARIANCE
Development complete	24-May-17	24-May-17	0
Unit testing complete	03-Jul-17	03-Jul-17	0
Integration testing complete	20-Jul-17	26-Jul-17	-4
Testing Complete	20-Jul-17	26-Jul-17	-4
Training materials complete	02-Nov-17	02-Nov-17	0
Documentation complete	21-Dec-17	07-Dec-17	10

PROJECT SITE

PROJECT SCHEDULE

% COMPLETE

44 %

0 % 100 %

RISKS & ISSUES

Acquisition Target Analysis

ISSUE STATUS

(1) Active

RISK STATUS

(1) Active

PROJECT

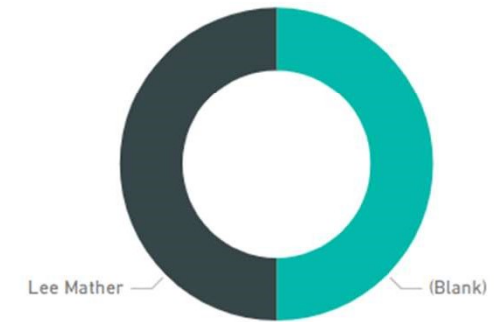
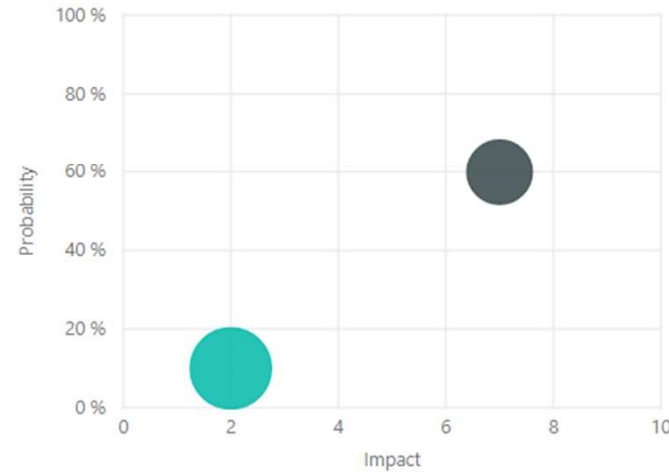
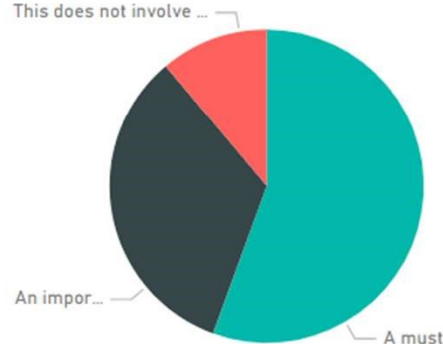
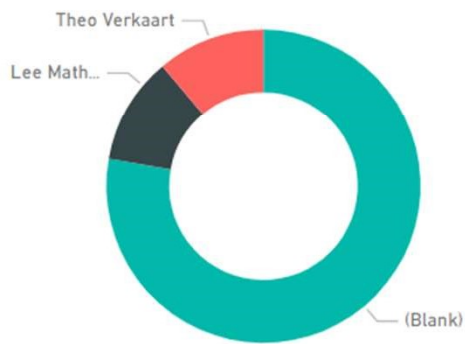
Acquisition Target Analysis

ISSUE COUNT BY OWNER > STATUS

ISSUE COUNT BY PRIORITY > STATUS

RISK MATRIX

RISK COUNT BY OWNER > STATUS



ISSUES BY CATEGORY

● (Blank) ● (1) Request for change ● (2) Off-specification ● (3) General Issue

RISKS BY CATEGORY

● (2) Economic/Financial/Market ● (6) Environmental

PROJECT ISSUES

ISSUE	OWNER	PRIORITY	DUE DATE	STATUS
Running out of disc space	Lee Mather	An impor...	19-Jun-17	(1) Active
Data supplier reliability		An impor...	25-Jun-17	(1) Active
Mailbox not accessible		This does ...	30-Jun-17	(1) Active
Scope creep		A must	14-Jul-17	(1) Active
Scope creep		An impor...	16-Jul-17	(1) Active
Customer acceptance		A must	05-Oct-17	(1) Active

PROJECT RISKS

RISK	OWNER	DUE DATE	PROBABILITY	IMPACT	STATUS
Data supplier reliability		18-May-17	10 %	2.00	(1) Active
Specification Design could be misunderstood	Lee Mather	23-Jun-17	60 %	7.00	(1) Active

My Work

Task Status

All

Resource

Christopher Pond

Projects

14

Tasks

21

Completed Tasks

3

Future Tasks

(Blank)

On Track Tasks

(Blank)

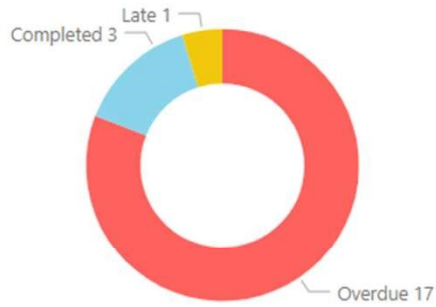
Late Tasks

1

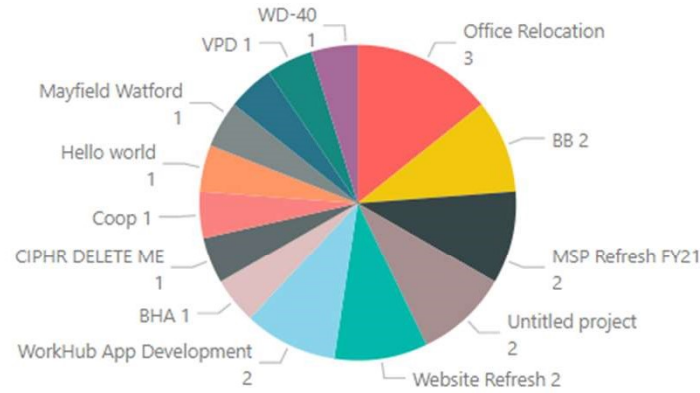
Overdue Tasks

17

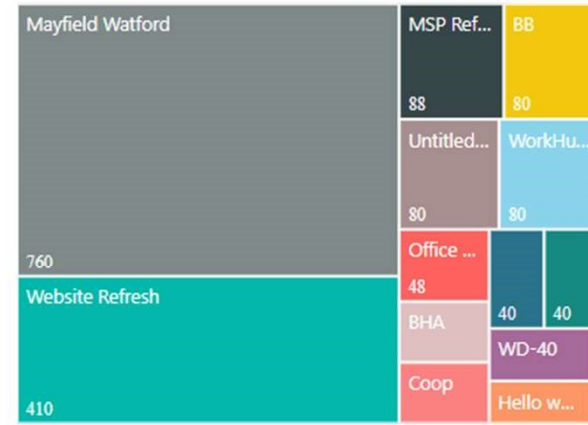
Tasks by Status



Tasks by Project > Bucket



Effort (Hours) by Project > Bucket



Effort

1,782

Hours

Effort Completed

466

Hours

Effort Remaining

1,316

Hours

Overdue Late On Track Future Completed

KPI	Task	Category	Project	Link	Start	Finish	Progress	Effort (Hours)	Effort Completed (Hours)	Effort Remaining (Hours)
Overdue	Create	Started	BB		14/10/2019	18/10/2019	0%	40	0	40
Overdue	Feedback / lessons learned	To-do	BB		18/11/2019	22/11/2019	0%	40	0	40
Overdue	Create	Bucket 1	BHA		26/02/2020	03/03/2020	0%	40	0	40
Overdue	Create	Bucket 1	CIPHR DELETE ME		04/03/2020	04/03/2020	0%	4	0	4
Overdue	Do some work	Bucket 1	Coop		26/06/2020	02/07/2020	0%	40	0	40
Overdue	Select	To-do	Hello world		31/10/2019	05/11/2019	0%	32	0	32
Overdue	Gather data for marketing to review	Bucket 1	MSP Refresh FY21		15/06/2020	26/06/2020	0%	80	0	80
Overdue	Webinar?	Bucket 1	MSP Refresh FY21		03/08/2020	03/08/2020	0%	8	0	8
Overdue	Calculate moving expenses	Finances	Office Relocation		30/10/2019	05/11/2019	60%	40	24	16
Overdue	Coffee and doughnuts	Moving Day	Office Relocation		03/01/2020	03/01/2020	50%	0	0	0
Overdue	Create	Bucket 1	Tuesday		21/02/2020	06/04/2020	0%	40	0	40
Total								1,782	466	1,316

Project



Project home page

The dashboard displays 'Active PIDs' with a bar chart and a table. The bar chart shows the count of PIDs for three owners: Jack Binnall (4), Christopher Pond (1), and Div Of Med & In... (8). The table lists 13 projects with columns for PID Name, Reference, Summary, Created On, and Owner.

PID Name	PID Reference	PID Summary	Created On	Owner
AMBT	CORP-2021-0001	A steering group will be set up to review non-...	06/05/2020 20:35	Div Of Med & Integra
Brimmes	CORP-2021-0004	Quisque maximus interdum lorem nec vehicula...	24/04/2020 11:57	Div Of Med & Integra
Brusali	OPER-2021-0001	Etiam tincidunt lacinia eros quis blandit. Intege...	22/05/2020 15:07	Jack Binnall
Ekeyt	EMPL-2021-0002	Etiam tincidunt lacinia eros quis blandit. Intege...	22/05/2020 09:45	Jack Binnall
Fistula	CORP-2021-0003	The directorate's strategy outlined in the 2019/...	19/04/2020 11:19	Div Of Med & Integra
Havasta	EMPL-2021-0001	Etiam tincidunt lacinia eros quis blandit. Intege...	07/05/2020 11:03	Div Of Med & Integra
Klepstaad	CORP-2021-0002	Phasellus blandit purus sem, dictum sagittis au...	26/05/2020 12:47	Jack Binnall
Lixhult	OPER-2021-0003	Phasellus blandit purus sem, dictum sagittis au...	18/05/2020 08:36	Christopher Pond
Lommarp	OPER-2021-0005	Ut condimentum sem vel velit molestie, et sagi...	27/05/2020 11:01	Jack Binnall
Oxberg	OPER-2021-0003	Ut condimentum sem vel velit molestie, et sagi...	06/05/2020 14:34	Div Of Med & Integra
Rakkestad	OPER-2021-0004	Mauris nec arcu interdum, elementum mi in, ul...	28/04/2020 10:44	Div Of Med & Integra
Songesand	CORP-2021-0006	Quisque maximus interdum lorem nec vehicula...	28/04/2020 08:45	Div Of Med & Integra
Syvde	CORP-2021-0005	Quisque maximus interdum lorem nec vehicula...	24/04/2020 11:16	Div Of Med & Integra

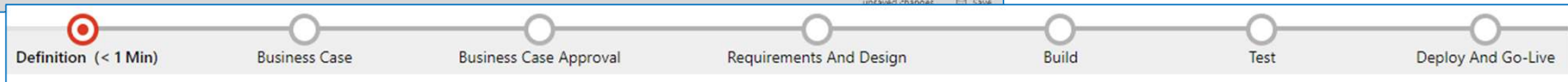
1. Home page
2. View, create, update and edit Projects
3. View and edit aggregated Project content
4. Views / access dependent on individual user

M365 Rollout							
IT Change Portfolio	M365 Rollout	Low Governance Project	Website 2020	CPS Admin	Amber	Azure Dev Ops	
IT Change Portfolio	M365 Rollout	Low Governance Project	Stock Control System	Ashley Holland	Green	Project	
IT Change Portfolio	M365 Rollout	Full Governance Project	Skype to Teams Migration	CPS Admin	Green	Project	
IT Change Portfolio	M365 Rollout	Low Governance Project	Microsoft Intune Roll Out	CPS Admin	Green	Project	
IT Change Portfolio	M365 Rollout	Informal Work	PID_2021_17877	CPS Admin	Red	Not Set	



Multiple project templates

1. Information to be entered differs depending on selected Project type
2. Project governance can also be defined based on templates





Navigation

AMBT
PID

Implementation
PID Status

Div Of Med & Integrated Care
Owner

PID BPF
Active for 34 days

Opportunity Plan In Progress Fully Developed Implementation (23 D) Closure

General Finance Estimates Finance Inter-dependencies Risks Issues Milestones Sign Off QIA EIA DPIA Related

- Home
- Recent
- Pinned
- AMBT
- Dashboards
- Dashboards
- Project Entities
 - PIDs
 - Financials
 - Risks
 - Issues
 - Milestones

1. Current Project stage (red)
2. Beneath the business process (red/grey) various tabs to enter information
 - a. General
 - b. Finance
 - c. Risks
 - d. Etc.
3. < Left – Aggregate views (Project Entities)



Project front page

AMBT
PID

Implementation
PID Status

Div Of Med & Integrated Care
Owner

PID BPF
Active for 34 days

Opportunity Plan In Progress Fully Developed Implementation (23 D) Closure

General Finance Estimates Finance Inter-dependencies Risks Issues Milestones Sign Off QIA EIA DPIA Related

PID Name *	AMBT	Project Manager *	Ben Halsey
PID Reference *	CORP-2021-0001	SRO	Adriano Selmi
PID Type *	Cost Improvement Programme	Finance Business Partner	Alan Eardley
Division	Div Of Med & Integrated Care	Trust Theme	ICT
Directorate *	Integrated Care	QIA Required?	Yes
Speciality	---	EIA Required?	Yes
NHSi Category *	Other Savings Plans	DPIA Required?	Yes

1. Various content to enter
2. Pick fields ensure data quality
3. Some mandatory (red asterisk)
4. Configurable

PID Summary *

A steering group will be set up to review non-pay spend and will aim to reduce costs by seeking best value. Initial work stream the following areas:

- 1) HD Consumables (mitigate cost pressure)
- 2) Home Dialysis Installation (single plumbing contract)
- 3) Kidney Perfusion (case to reduce cost of consumables)
- 4) PD Purchasing (Renew contract to reduce costs)
- 5) Sample Transportation (Change provider to NWL to reduce costs and double charging)

What will be different/better? State specifically the quantitative and qualitative benefits and changes that the PID will realise.

1. Patients: More allocated theatre time will allow us to reduce waiting times for patients and increase their likelihood of starting
2. Efficiency: Starting with AVF vascular access first, rather than after a central venous catheter (CVC) being fitted prevents 'rew
3. Reputation: As highlighted in the latest GIRFT report, Imperial is a significant outlier for high levels of "non-native" (CVC) ac
4. Financial: As demonstrated below, the additional theatre lists generates a positive financial contribution.

AMBT
PID

PID BPF
Active for 6 months

Opportunity Plan In Progress Fully Developed

General Estimates Finance Summary (auto calculated) Finance Detail

Completed

Finance Information *	Entered?	Yes
Operational KPI's *	entered?	Yes

Set Active

PID Name *	AMBT
PID Reference	ICT-2020-0002
PID Type *	Trust Wide Programme
Division	Div Of Med & Integrated Care
Directorate *	Integrated Care



Project sign-off

Multi-person sign-off

AMBT
PID

PID Status: **Implementation**
Owner: **Div Of Med & Integrated Care**

PID BPF
Active for 34 days

Opportunity | Plan In Progress | Fully Developed | **Implementation (23 D)** | Closure

General | Finance Estimates | Finance | Inter-dependencies | Risks | Issues | Milestones | **Sign Off** | QIA | EIA | DPIA | Related

Senior Responsible Officer	Adriano Selmi	Finance Business Partner	Alan Eardley	Divisional Director of Operations	Alan Eardley
Approved By SRO	Yes	Approved By FBP	Yes	Approved By DDO	Yes
Date Signed	10/06/2020	Date Signed	18/05/2020	Date Signed	18/05/2020
Actual Approver for SRO	Christopher Pond	Actual Approver for FBP	Michael Bleakley	Actual Approver for DDO	Michael Bleakley

Approval comments sign-off: **Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nunc condimentum eget odio et tincidunt. Cras viverra sem et urna consequat.**



Finance

Assembly Optimization at Adatum

Project Stages: New (21 D) | Quote | Plan | Deliver | Complete | Close

Summary | Tasks | Team | Resource Assignments | Resource Reconciliation | **Estimates** | Tracking | Sales | Expense Estimates | Related

Task	Resourcing Unit	Start Date	End Date	Quantity	Unit	8/30/2020	9/6/2020	9/13/2020	9/20/2020	9/27/2020	10/4/2020	10/11/2020
Consulting Lead (2)				88.00		10,816.00				5,408.00	13,520.00	
Telemetry	Fabrikam US	09/01/2020	09/04/2020	32.00	Hour	10,816.00						
Training	Fabrikam US	10/01/2020	10/09/2020	56.00	Hour					5,408.00	13,520.00	
Network Technician (1)				48.00			6,000.00	1,200.00				
Specs and metrics	Fabrikam US	09/07/2020	09/14/2020	48.00	Hour		6,000.00	1,200.00				
Operations Analyst (1)				64.00				5,408.00	5,408.00			
Acceptance and Sign offs	Fabrikam US	09/15/2020	09/24/2020	64.00	Hour			5,408.00	5,408.00			
Optimization Specialist (1)				80.00			6,000.00	6,000.00				
Instrumentation	Fabrikam US	09/07/2020	09/18/2020	80.00	Hour		6,000.00	6,000.00				
Robotics Engineer (1)				32.00					1,504.00	4,512.00		
Wiring	Fabrikam US	09/25/2020	09/30/2020	32.00	Hour				1,504.00	4,512.00		
Robotics Technician (1)				56.00				6,592.00	4,944.00			
Diagnostics	Fabrikam US	09/15/2020	09/23/2020	56.00	Hour			6,592.00	4,944.00			
Software Engineer (1)				64.00					9,000.00	5,400.00		
Installation	Fabrikam US	09/21/2020	09/30/2020	64.00	Hour				9,000.00	5,400.00		
Project Manager (1)				32.00								3,840.00
Documentation	Fabrikam US	10/12/2020	10/15/2020	32.00	Hour							3,840.00
						10,816.00	12,000.00	19,200.00	20,856.00	15,320.00	13,520.00	3,840.00

1. Resource based costing & pricing
2. Fixed price, T&M and retainer type contracts.

COSTS

DEPARTMENT

All

PROJECT TYPE

Enterprise Project

PROJECT OWNER

All

GOVERNANCE PHASE

All

COST KPI

At least 20% over baseline cost



Less than 10% over baseline cost



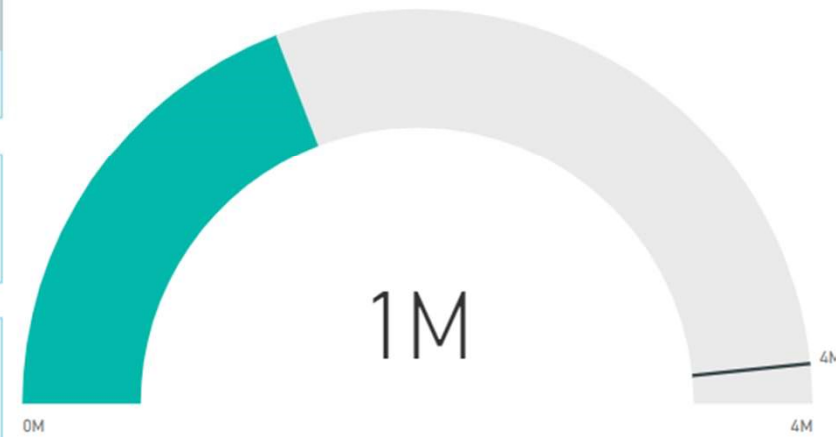
No Baseline



TOP PROJECTS BY COST

Automated Software Installation			
533,170	583,560	145,634	50,390
BASELINE COST	EAC (COST)	ACTUAL COST	COST VARIANCE
Customer Service Feedback Portal			
399,340	416,740	357,940	17,400
BASELINE COST	EAC (COST)	ACTUAL COST	COST VARIANCE
New Dynamics 2016 CRM System			
405,910	405,910	33,550	0
BASELINE COST	EAC (COST)	ACTUAL COST	COST VARIANCE

PORTFOLIO COSTS



PROJECT COST

4M

LOCAL CURRENCY

BASELINE COST

4M

LOCAL CURRENCY

ACTUAL COST

1M

LOCAL CURRENCY

COST VARIANCE

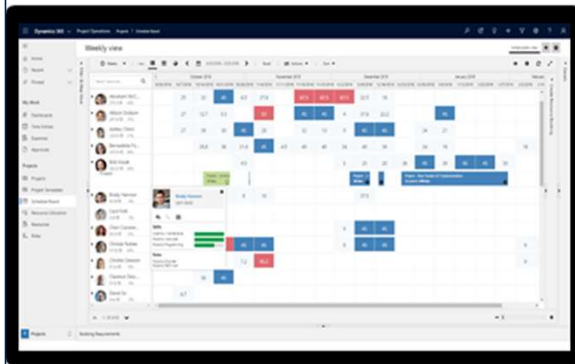
36.38K

LOCAL CURRENCY

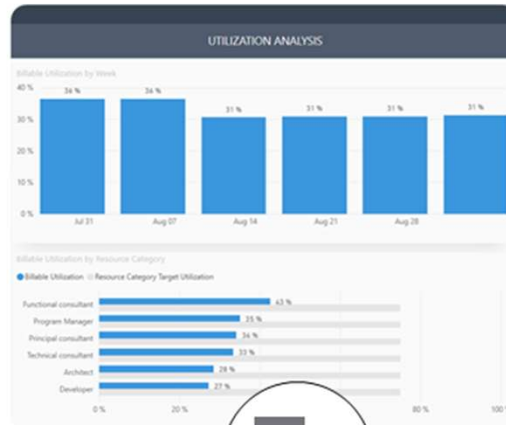
COST HEALTH > PROJECT > COST TYPE	BUDGET COST	BASELINE COST	EAC (COST)	ACTUAL COST	REMAINING COST	COST VARIANCE
	0		1,000	0	1,000	0
ServiceDesk_Test_testforLongProjectNamesInTheTSSIGNoff	0		1,000	0	1,000	0
	0	90,080	274,255	77,455	196,800	165,255
Audit Tracking	0	90,080	274,255	77,455	196,800	165,255
	0	3,344,472	3,456,827	1,231,573	2,225,254	271,145
IT Change Programme	0	119,800	95,120	80,528	14,592	-24,680
Sigma Product Development	0	319,442	319,442	72,340	247,102	-23,200
Big Data Analytics	0	41,360	41,360	0	41,360	0
edison365 Introduction	0	52,960	52,960	28,960	24,000	0
Exchange Online Migration	0	20,040	20,040	0	20,040	0
Global IT Rollout	0	13,200	13,200	0	13,200	0
HR Flowchart Design	0	50,270	50,270	6,468	43,802	0
Merck Design Build subproject	0	7,800	7,800	300	7,500	0
Microsoft Exchange Online migration	0	213,840	213,840	0	213,840	0
New Dynamics 2016 CRM System	0	405,910	405,910	33,550	372,360	0
New Power Bi Reports	0	4,620	4,620	0	4,620	0
Total	0	3,434,552	3,732,082	1,309,028	2,423,054	436,400



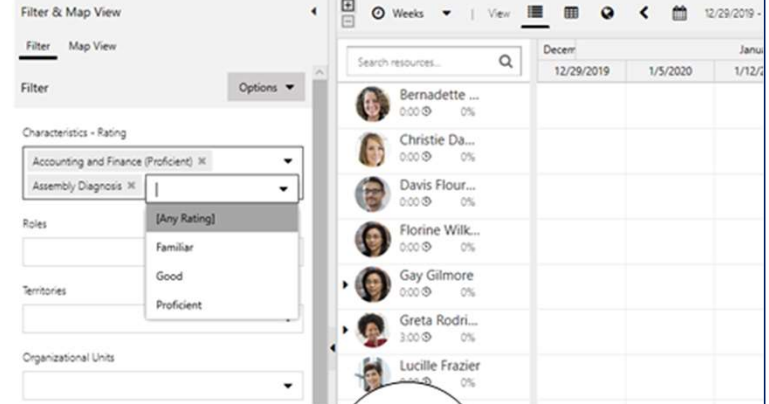
Resource Management



Match team member skill sets with project demands and identify gaps in resourcing.



Improve efficiency with broad visibility into availability and dynamic scheduling.



Identify and prioritize resources to address staffing needs more completely and in less time.



Source resource for requirement

Weekly view

Initial public view | My PM View

Filter & Map View

Filter | Map View

Filter

Options

Characteristics - Rating

Project Management (Good)

Roles

Project Manager

Territories

Organizational Units

Search

Search resources...

November 2020

	11/1/2020	11/8/2020	11/15/2020	11/22/2020	11/29/2020
Abraham McCormick 192:00 22%	40	40	40	40	32
Allison Dickson 432:00 51%	80	80	80	80	72
Ashley Chinn 1192:00 141%	80	80	80	80	80
Bernadette Foley 240:00 28%	40	40	40	40	40
Bo Jorgensen 0:00 0%					

1 - 30 of 43

Open Requirements | Project | Unscheduled Work Orders

Search by Requirement Name

Name	From Date	To Date	Duration	Proposed	Fulfilled	Remaining	Priority	Territory	Time F	Time T	Status
SCM Request for Network Equipment - Consu...	10/26/2020	12/03/2020	85 hrs 3...	0 min	0 min	85 hrs 3...					Active
SCM Request for Network Equipment - Consu...	11/05/2020	11/27/2020	80 hrs	0 min	0 min	80 hrs					Active
SCM Request for Network Equipment - Gener...	10/05/2020	12/08/2020	52 hrs	0 min	0 min	52 hrs					Active
SCM Request for Network Equipment - Gener...	10/09/2020	12/21/2020	16 hrs	0 min	0 min	16 hrs					Active

Record 1 - 22 of 22



Resource details

Navigation: Weeks | View | 11/1/2020 - 3/27/2021

Search resources...

	11/1/2020	11/8/2020	11/15/2020
Allison Dickson 432:00 ⌚ 51%	80	80	80
Ashley Chinn 1192:00 ⌚ 141%	80	80	80
Bernadette Foley 240:00 ⌚ 28%			
Bo Jorgensen 0:00 ⌚ 0%			
Brittany Saylor 28:00 ⌚ 2%			

Bernadette Foley
GMT-08:00

Skills

- Accounting and Finance
- Assembly Line Design
- Inventory Management
- Operations Research
- Project Management

Roles

- Operations Analyst

1 - 30 of 43

To Date: 11/27/2020 | Duration: 80 hrs 0 min 0 min 80 hrs

Bernadette Foley
Bookable Resource

General Project Service Field Service Scheduling Work Hours Related

Resource Skills

Name	Characteristic	Rating Value
Skill - Accounting and Finance	Accounting and Finance	Proficient
Skill - Assembly Line Design	Assembly Line Design	Good
Skill - Inventory Management	Inventory Management	Proficient
Skill - Operations Research	Operations Research	Proficient

Resource Role

- Operations Analyst
No

Bernadette Foley
Bookable Resource

General Project Service Field Service Scheduling Work Hours Related

+ New Today November 2020 Month

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Nov 1	2 09:00 AM Working	3 09:00 AM Working	4 09:00 AM Working	Nov 5 09:00 AM Working	6 09:00 AM Working
8	9 09:00 AM Working	10 09:00 AM Working	11 09:00 AM Working	12 09:00 AM Working	13 09:00 AM Working



Resource reconciliation

SCM Request for Network Equipment
Project

12/21/2020 5:00 PM Due Date | \$69,376.800 Estimated Labor Cost | 0.00 Cost Consumption % | 0.00 Progress %

Project Stages
Active for 37 days

New (37 D) | Quote | Plan | Deliver | Complete

Summary | Tasks | Team | Resource Assignments | **Resource Reconciliation** | Estimates | Tracking | Sales | Expense Estimates | Related

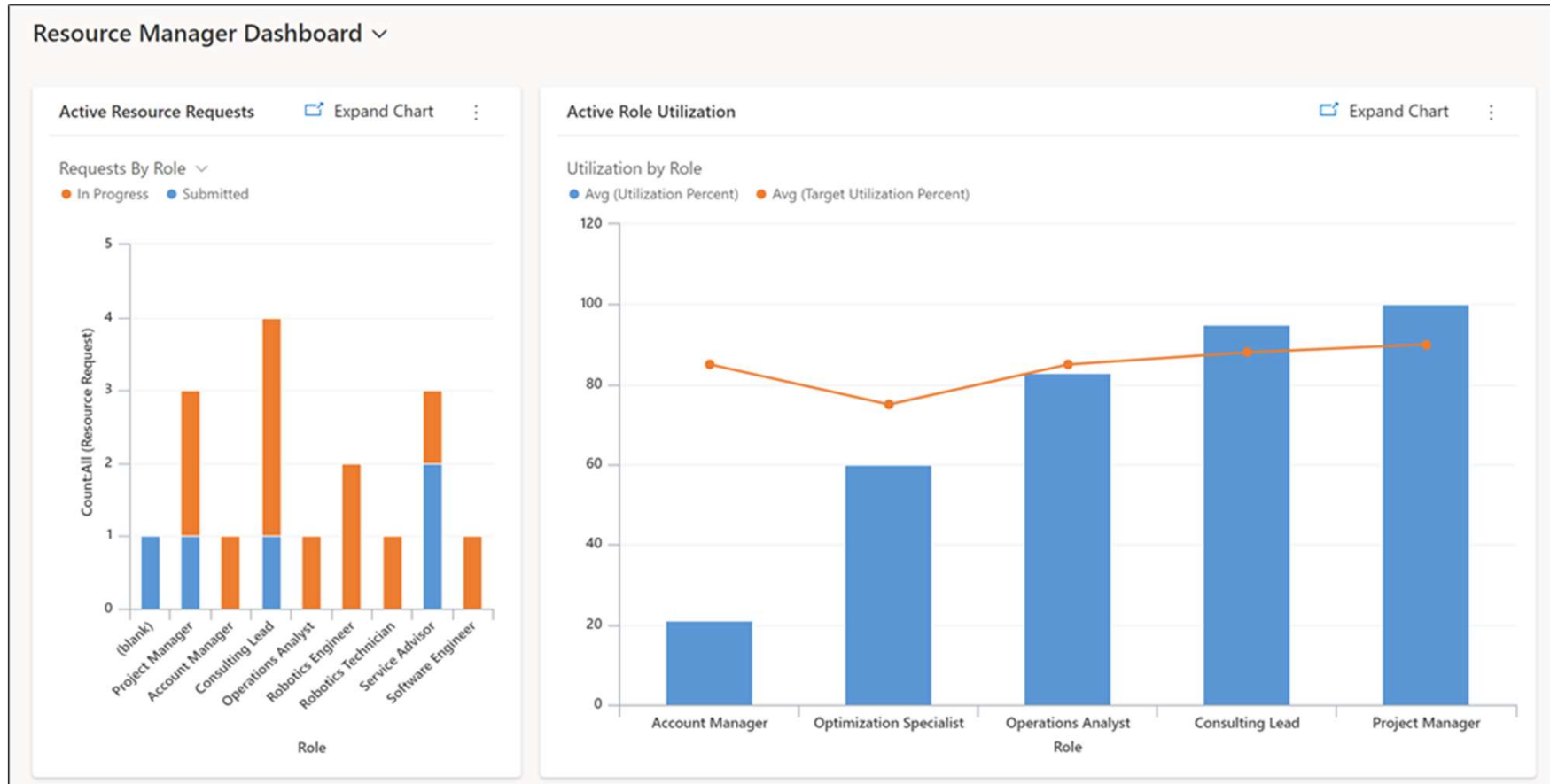
Search resources... Refresh Previous difference Next difference ... 11/5/2020 Timescale: Week Options

Resource	Total	11/1/2020	11/8/2020	11/15/2020	11/22/2020	11/29/2020	12/6/2020	12/13/2020	12/20/2020	12/27/2020
> Ashley Chinn	0.00							-8.00	-8.00	
▼ Brittany Saylor	0.00	-14.00	54.00		-40.00					
Booked	152.00		80.00							
> Assigned	152.00	14.00	26.00		40.00					
> Katri Dalainovic	0.00			-1.00	1.00					
	0.00	-14.00	54.00	-1.00	-39.00	0.00	0.00	-8.00	-8.00	0.00

Legend: Booking shortage Excess bookings

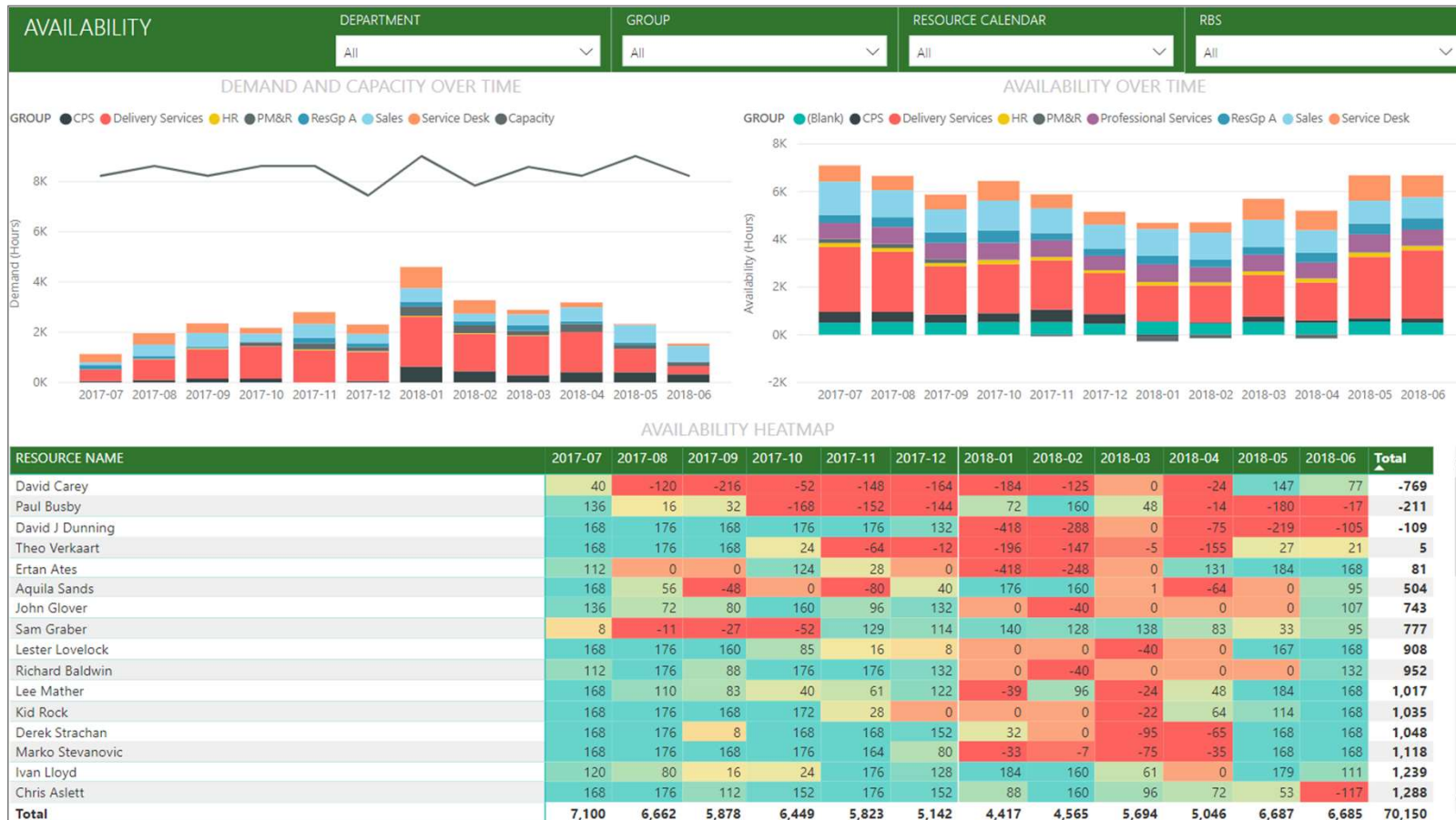


Resource analytics





Resource analytics





Project schedule



Simple & powerful project management for everyone



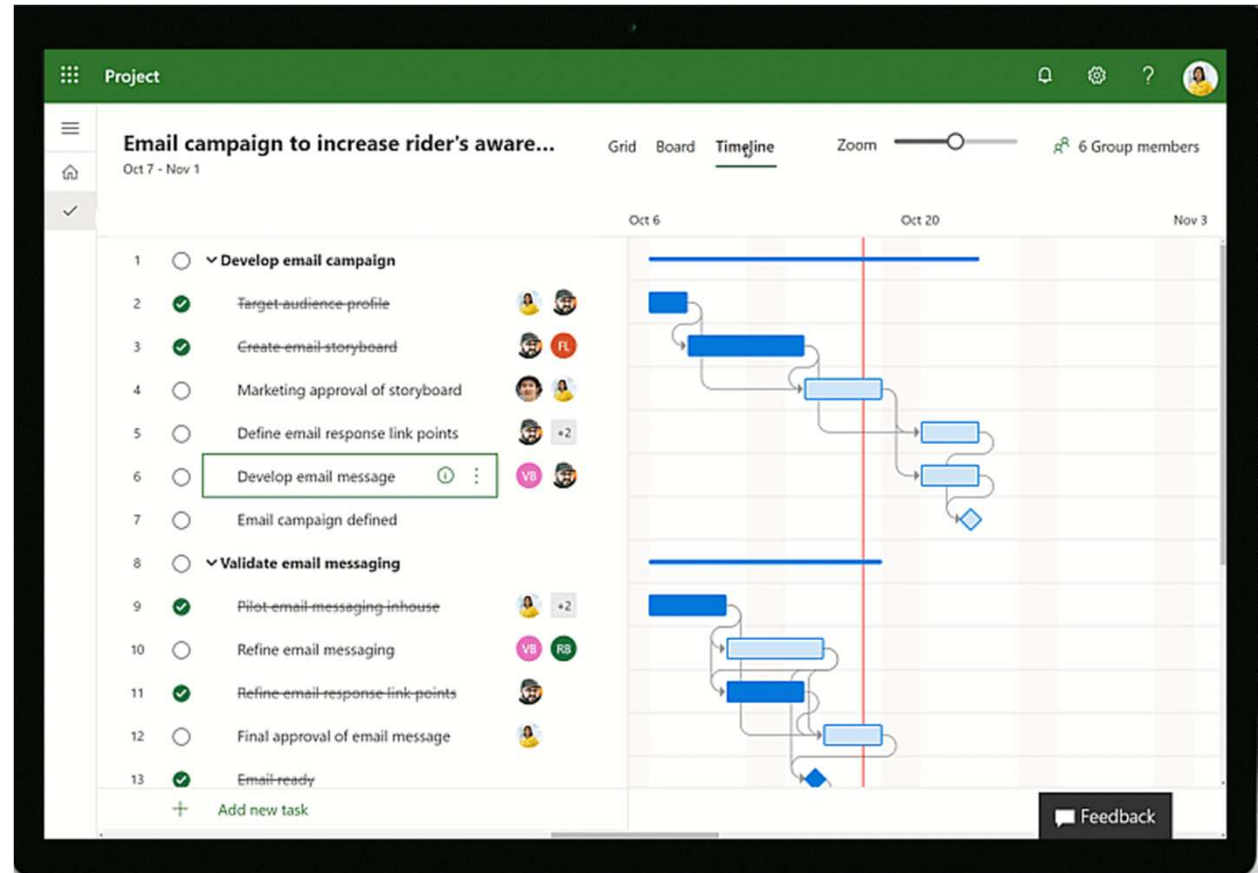
Collaboration made easy



Intelligent planning



Integration with D365





Schedule - Grid

Activity Chat Teams Planner Calendar Communities Calls Files

Mayfield Watford

18 Sep 2020 - 4 Feb 2021 Grid Board Timeline

Filters (0)

Name	Assigned to	Duration	% complete	Depends on	Start	Finish
1 Development		95 days	8%		18/9/2020	28/1/2021
2	Obtain signage guidelines from the Town Council and subm... Christopher Pond	19 weeks	0%		18/9/2020	28/1/2021
3	Check CCTV arrangements with development / contractors	4 weeks	0%		18/9/2020	15/10/2020
4	Agree all drawings for kitchen	4 weeks	0%	3	16/10/2020	12/11/2020
5	Agree all drawings for bar layouts	4 weeks	50%		18/9/2020	15/10/2020
6	Ensure Lift Operational for Design Department/furniture mo...	4 weeks	25%		18/9/2020	15/10/2020
7	Confirm address and postcode with the local authority	1 week	0%		18/9/2020	24/9/2020
8	Plan internal signage	8 weeks	0%		18/9/2020	12/11/2020
9	Attend-Contractors-Meeting—Determine-issues,-risks-and-pr...	4 days	100%		18/9/2020	23/9/2020
10	Review Telephone/Security/Cable TV/Internet services	2 days	0%		18/9/2020	21/9/2020
11 Facilities		100 days	0%		18/9/2020	4/2/2021
12	Plan Maintenance person induction	2 weeks	0%		18/9/2020	1/10/2020
13	Deliver Maintenance person induction	2 weeks	0%	12	2/10/2020	15/10/2020
14	Set up national contracts with authorised maintenance supp...	16 weeks	0%	13	16/10/2020	4/2/2021
15	Organise refuse collection	6 weeks	0%	12	2/10/2020	12/11/2020
+ Add new task						



Schedule – Task Board

The screenshot shows a Microsoft Project Task Board for a project named "Mayfield Watford". The interface includes a search bar at the top, a navigation sidebar on the left with icons for Activity, Chat, Teams, Planner, Calendar, Communities, Calls, and Files, and a main workspace with three columns: "Not started", "In progress", and "Completed".

Not started

- Add task
- Check CCTV arrangements with development / contractors
Bucket 1
4 weeks
15/10
- Confirm address and postcode with the local authority
Bucket 1
1 week
24/09
- Obtain signage guidelines from the Town Council and submit planning application
Bucket 1
19 weeks
28/01/2021
- Plan internal signage
Bucket 1
8 weeks
12/11

In progress

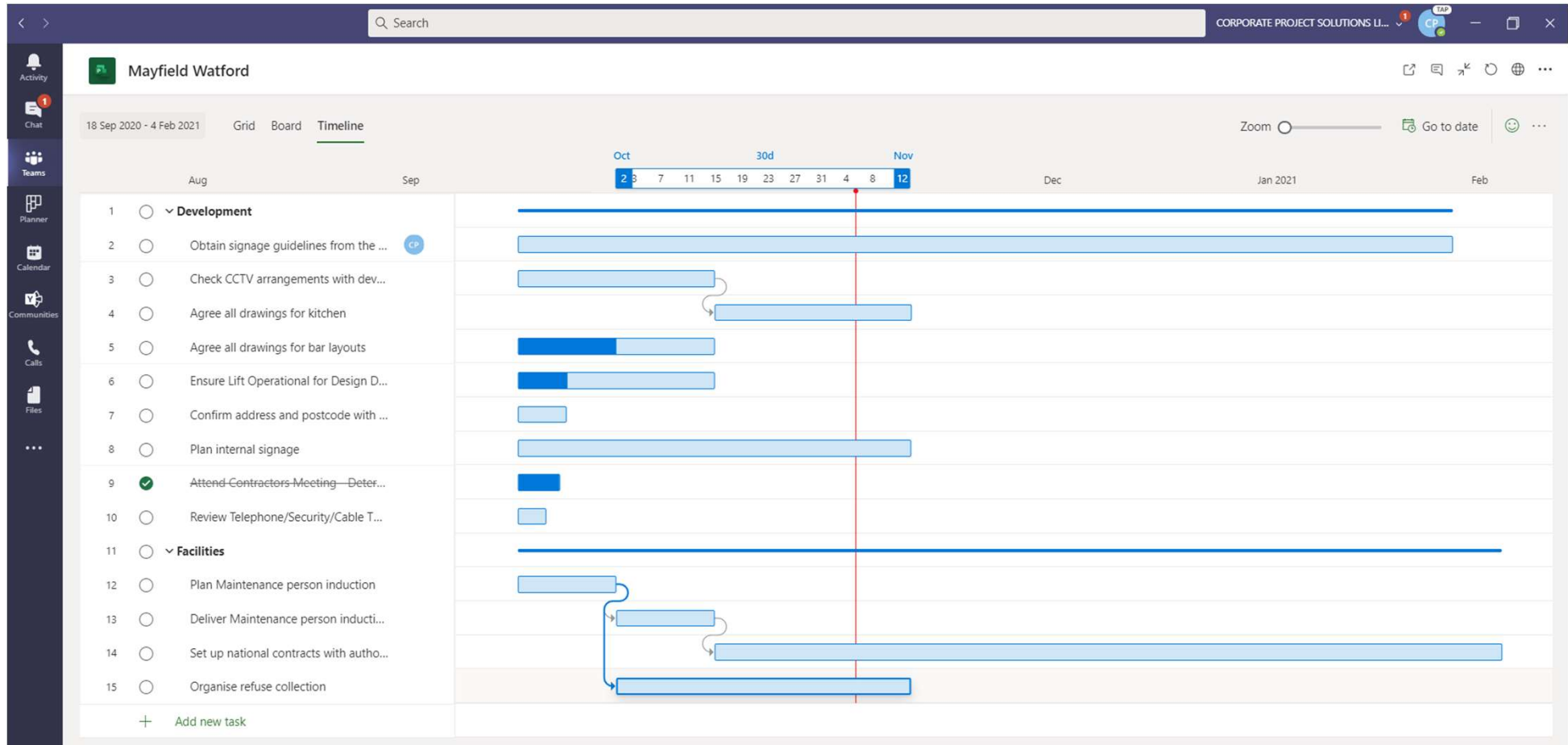
- Add task
- Ensure Lift Operational for Design Department/furniture move-in
Bucket 1
4 weeks 25%
15/10
- Agree all drawings for bar layouts
Bucket 1
4 weeks 50%
15/10

Completed

- Add task
- Attend Contractors Meeting – Determine issues, risks and progress
Bucket 1
4 days 100%
23/09



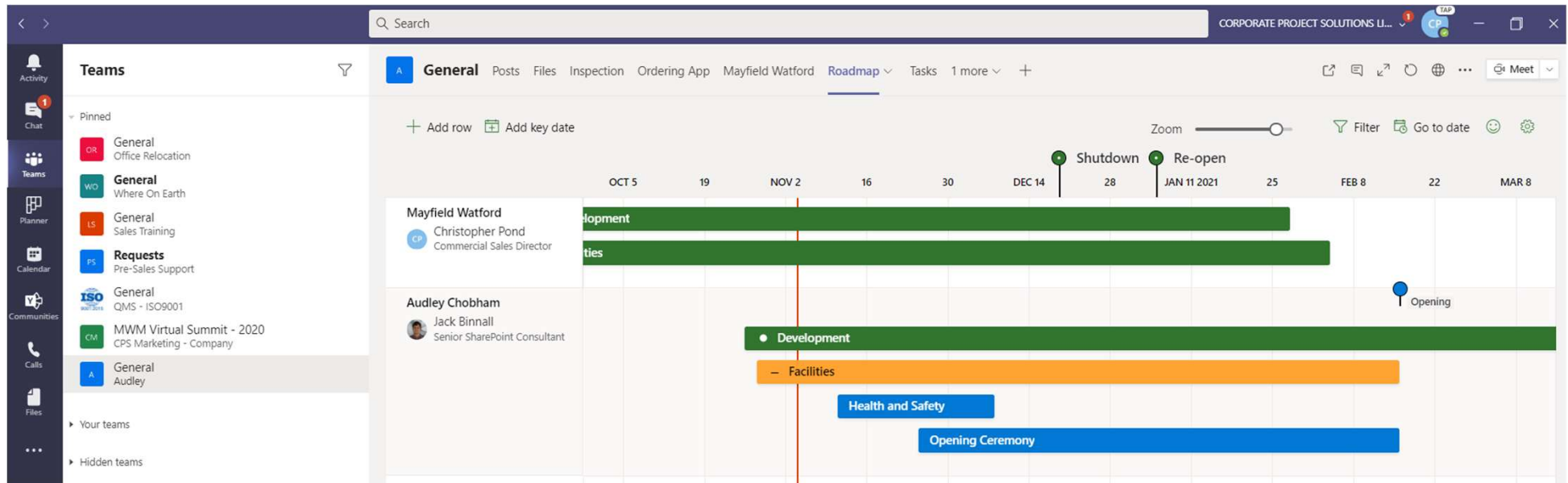
Schedule – Gantt (Timeline)





Project Roadmap

Combine multiple projects into a single view



PORTFOLIO DASHBOARD

DEPARTMENT:
 PROJECT TYPE:
 PROJECT OWNER:
 GOVERNANCE PHASE:

PROJECT COUNT
39

PROJECT COST
6M
LOCAL CURRENCY

COST VARIANCE
459K
LOCAL CURRENCY

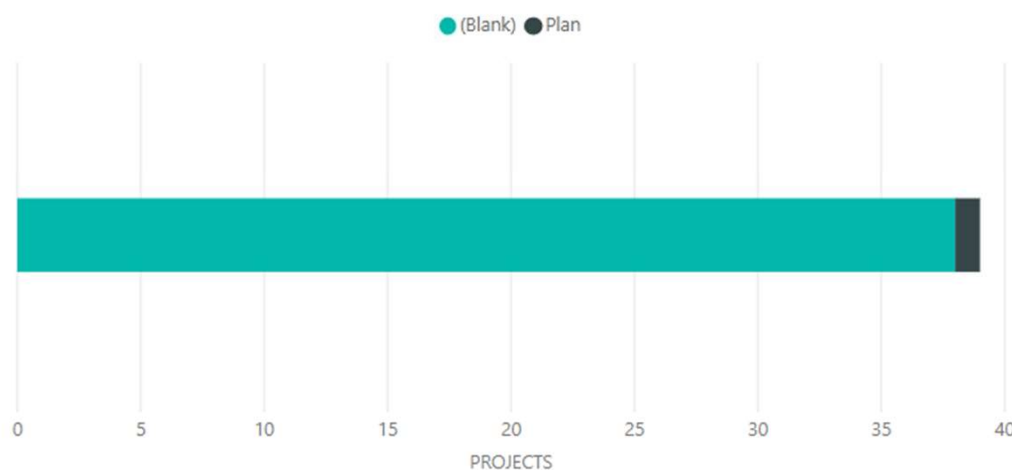
PROJECT WORK
74K
HOURS

WORK VARIANCE
14.08K
HOURS

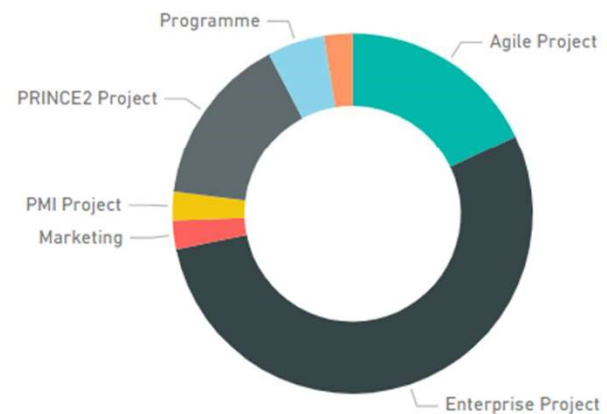
RISKS COUNT
28

ISSUES COUNT
61

PROJECTS BY GOVERNANCE PHASE



PROJECTS BY TYPE



PROJECT NAME	PROJECT OWNER	START DATE	FINISH DATE	COST	COST HEALTH	WORK HEALTH	SCHEDULE HEALTH	% COMPLETE
Business 2020	Duncan Griffin	22-May-18	09-Jul-18	36,080	●	●	●	0 %
Test Chris	Chris Aslett	26-Sep-18	26-Oct-18	0	●	●	●	0 %
3D Printer Development	Phillippa Ritchie	07-Mar-18	02-Apr-19	144,073	●	●	●	40 %
Acquisition Target Analysis	Ivan Lloyd	11-Dec-16	24-May-18	297,345	●	●	●	44 %
Agile Product Development	Ivan Lloyd	10-Jul-17	03-May-40	566,610	●	●	●	17 %
ArrowHead Flowshare	Duncan Griffin	19-Jul-17	18-Jun-18	428,160	●	●	●	25 %
Arrowhead Flowshare installation	Ivan Lloyd	31-Jul-17	12-Apr-18	191,647	●	●	●	12 %
Audit Tracking	Paul Mather	15-Nov-17	24-Dec-19	274,255	●	●	●	28 %
Automated Software Installation	Ada Andersen	06-Nov-17	12-Nov-18	583,560	●	●	●	28 %
Big Data Analytics	Lester Lovelock	04-Jun-18	13-Sep-18	41,360	●	●	●	0 %
Crazy Electronics	Chris Aslett	18-Sep-17	09-Apr-18	46,560	●	●	●	10 %
Customer Service Feedback Portal	Phillippa Ritchie	03-Nov-17	14-Jun-18	416,740	●	●	●	86 %



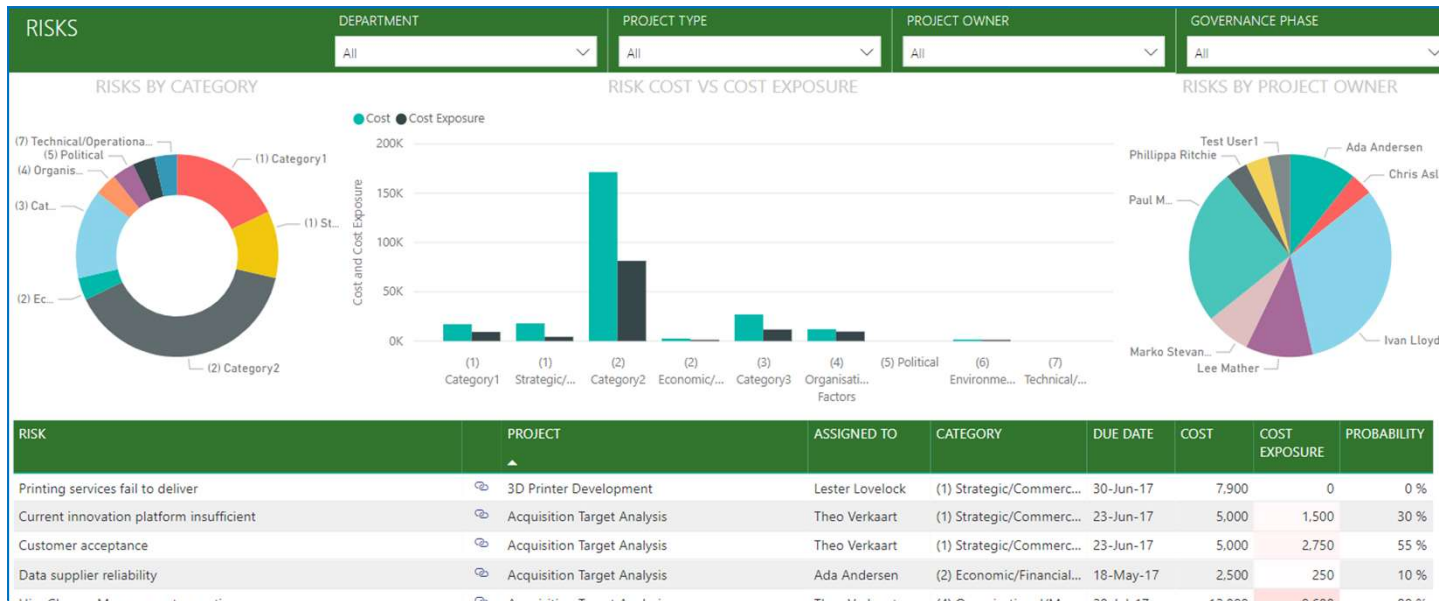
Risks, Issues & other logs

Risks

+ New Risk Refresh Run Report

PID	Risk Name	Likelihood(1-5)	Impact(1-5)	Risk Rating	Mitigating Actions
AMBT	Sky falls in	2 - Unlikely	2 - Minor	4	Lorem ipsum dolor sit amet, consectetur...
AMBT	Coffee unavailable	3 - Possible	5 - Catastrophic	15	Lorem ipsum dolor sit amet, consectetur...
AMBT	Unable to deploy	1 - Rare	5 - Catastrophic	5	Lorem ipsum dolor sit amet, consectetur...

1. Capture risks, issues and other list-based data e.g. Changes



2. Forms entry

3. Aggregate views & reports / dashboards



Highlight report

1. Take data from across Dynamics
2. Create Word based templates

PROJECT DESCRIPTION			
As Skype nears its retirement, this project is to <u>manage</u> the shift of users to Teams.			
WORK DETAILS			
Owner	CPS Admin	Portfolio	IT Change Portfolio
Work Type	Low Governance Project	Programme	M365 Rollout
Current Stage	Requirements And Design	Primary Tracking Tool	Project
STATUS UPDATES			
Status Date	Title	Status Summary	RAG
20/01/2020	Week 1	The project has got off to a good start	Green
12/01/2020	Week 2 Update	It clear that there are some major issues in the project, it needs to be re-scoped out.	Red
16/01/2020	Week 3 Update	Everyone's super happy now! We fixed the issues and are back on track.	Green
31/01/2020	Friday Update	Friday Update	Amber
21/02/2020	Week 5 Debrief	Going well	Green
16/03/2020	Going off the boil		Amber
17/04/2020	nother Demo	nother Demo	Amber
27/04/2020	Nichola	Lorum ipsum	Red
29/04/2020	Weekly status update	Weekly status update	Green
20/05/2020	Weekly Status Report	Weekly Status Report	Green
16/06/2020	Test	Test	Green
18/06/2020	This week	Everything is great	Green
26/08/2020	Wednesday's update.	Wednesday's update.	Green
26/08/2020	Dude	Dude	Green
18/09/2020	VF	Lorum ipsum	Green
RISKS			
Title	Mitigation Plan	Due Date	Exposure
Deploy Teams App to iOS and Android - Edited		28/02/2020	5
The security model might be to hard to understand	More training and user guides	17/03/2020	25
lorum ipsum			50
Bad coffee			
ISSUES			
Title	Description	Resolution	Priority
The cake to celebrate the move is delayed	We are all hungry and there is no food.	Get cupcakes from another supplier	Medium
A new issue from the app	description	The plan is in place	Medium



Team member

☰ Show Chart 👤 Assign ➦ Share 📧 Email a Link | ⌵ ⚙️ Flow ⌵ 📊 Run Report ⌵ 📄 Word Templates ⌵

My Weekly Time Entries ⌵

+ New 📄 Copy row 🖋️ Edit row ✓ Submit ↶ Recall 🗑️ Delete ↻ Refresh 📄 Copy week ⬅️ Import ⌵ 📄 Edit entry

<input checked="" type="checkbox"/>	Time Source ⌵	Project ⌵	Project Task ⌵	Entry Status ⌵	Sun 9/6	Mon 9/7	Tue 9/8	W
<input type="checkbox"/>	Project Service			Draft				
<input type="checkbox"/>	Project Service	Contoso Project	Development	Submitted				
<input type="checkbox"/>	Project Service	Contoso Project	Kick off session	Submitted		1.00		
<input type="checkbox"/>	Project Service	Contoso Project	Project Sign Off	Submitted				
<input type="checkbox"/>	Project Service	Contoso Project	Testing	Submitted				
<input type="checkbox"/>	Project Service	Contoso Project	Workshop	Submitted		2.00	2.00	
<input type="checkbox"/>	Project Service	Fabrikam	360 Sign off	Draft			1.00	
<input type="checkbox"/>	Project Service	Fabrikam	Board Review	Draft				
<input type="checkbox"/>	Project Service	Fabrikam	Community Call	Draft			1.00	
<input type="checkbox"/>	Project Service	Fabrikam	Design	Draft		2.00	2.00	
<input type="checkbox"/>	Project Service	Fabrikam	Impact Assessment	Draft				
<input type="checkbox"/>	Project Service	Fabrikam	Marketing	Draft				
<input type="checkbox"/>	Project Service	Fabrikam	POC Planning	Draft				
<input type="checkbox"/>	Project Service	Wingtip Toys	Customer Feedback Session	Submitted		1.00		
<input type="checkbox"/>	Project Service	Wingtip Toys	Legal Review	Submitted				
<input checked="" type="checkbox"/>	Project Service	Wingtip Toys	Marketing Approval	Recall Requested				
<input type="checkbox"/>	Project Service	Wingtip Toys	Name definition	Submitted			0.50	
<input type="checkbox"/>	Project Service	Wingtip Toys	Prototype Design 1	Approved			1.00	
<input type="checkbox"/>	Project Service	Wingtip Toys	Prototype Design 2	Approved			1.00	
<input type="checkbox"/>	Project Service	Wingtip Toys	Prototype Design 3	Approved				
					0.00	6.00	8.50	



Team member

Onsite expenses
9/4/2020 - 9/8/2020

Expenses Receipts

+ New expense + Unattached expenses Remove Bulk edit Copy

	Date	Expense category	Merchant	Amount	Amount in USD	Project ID	Payment method	Receipts attached
✓	9/4/2020	CarRental-Expense	Avis	121.31 USD	121.31		PettyCash	No
✓	9/7/2020	Conference-Expense	Microsoft Events	2,000.00 USD	2,000.00		PettyCash	No
✓	9/4/2020	Flight-Expense	Delta	450.00 USD	450.00		PettyCash	No
✓ ✕ ⌚	9/8/2020	Hotel-Expense	Contoso Hotels	300.00 USD	300.00		PettyCash	No
✓ ⌚	9/8/2020	Hotel-Expense	Contoso Hotels	210.00 USD	210.00		PettyCash	No
✓	9/4/2020	Taxi-Expense	Black Cabs	42.00 USD	42.00		PettyCash	No



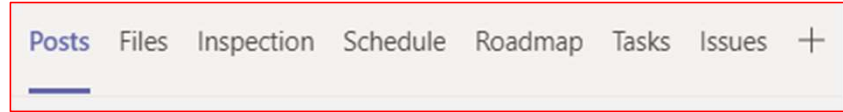
Team member App (example)

What are you working on?	Microsoft Intune Roll Out	Microsoft Intune Roll Out	Microsoft Intune Roll Out
Annual Company Wine and Dine	Detailed Description of Work: Roll-out Intune to deliver the following business benefits...	Status Updates	Work Updates
Data Center Migration Programme	Status Reports	* Status Date 30/01/2020	Date 13/02/2020
Dog Lead Reseach	Work Updates	* Status Report Title Wednesday's report	* Update Title Ran customer webinar
Ergonomic Post Knocker Market	Risks	Status Summary Things are going swimmingly	Work Update Launching workhub Provided amazing offer
HR Paperless Office Initiative	Issues	Overall RAG Green	How long did you spend on this (Minutes)? 60
Libra		Actions Next Period	Created On 13/02/2020 11:02
Microsoft Intune Roll Out			
Pecksniffs			
Project workhub			
Skype to Teams Migration			



Teams integration

Everything about your project in one place



The screenshot shows the Microsoft Teams interface. On the left is a navigation pane with icons for Activity, Chat, Teams, Planner, Calendar, Communities, Calls, and Files. The main area displays a channel named 'General Audley'. At the top of the channel, there is a search bar and a set of navigation tabs: 'General', 'Posts', 'Files', 'Inspection', 'Schedule', 'Roadmap', 'Tasks', 'Issues', and '+'. Below the tabs, a 'Welcome to the team!' message is displayed with the text 'Here are some things for you to get started...'. Three circular icons are shown: 'Add more people' (with a plus sign and people icons), 'Create more channels' (with a document and plus sign icon), and 'Open the FAQs' (with a question mark icon). Below these are two messages from Jack Binnall and Christopher Pond, both stating they added a new tab at the top of the channel. The messages include links to 'Audley App' and 'New Village' respectively. The bottom left corner of the image contains the text 'JOINED UP SOLUTIONS'.

Q&A

Dashboard & Report Appendix

Summary


PID Count	No. of Risks	No. of Issues
13	10	6
PID Actual/Forecast Value (£)		PID Planned Value (£)
962.0K		1.5M

Report Filters

Division

Directorates

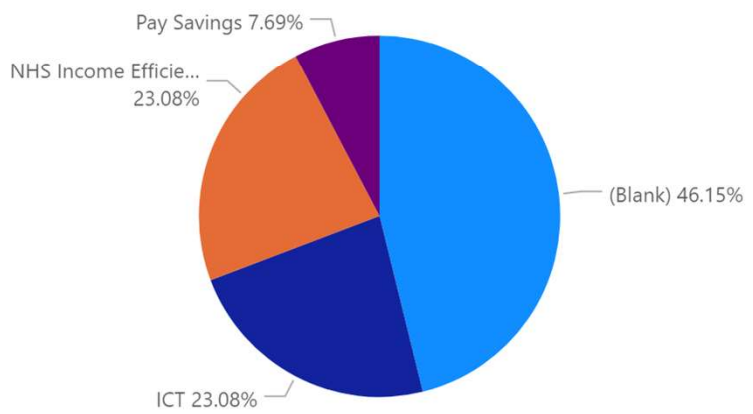
Speciality



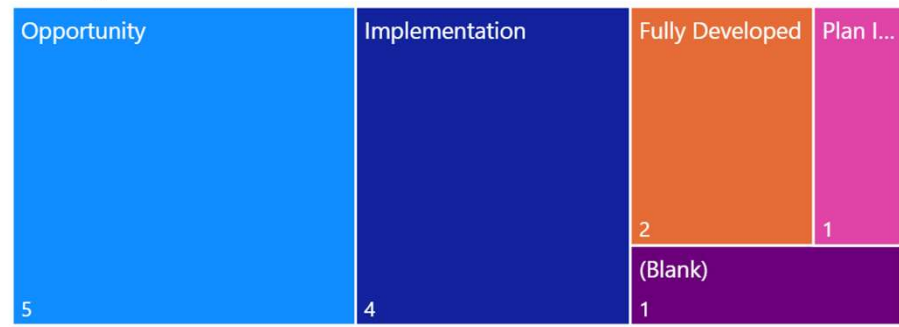
Project Manager Name

Page Filters

PIDs by Theme



PIDs by Status



PID	PID Summary	Created Date	PID Status	Record Link
AMBT	<p>A steering group will be set up to review non-pay spend and will aim to reduce costs by seeking best value. Initial work streams will include the projects to improve quality and reduce costs in the following areas:</p> <ol style="list-style-type: none"> 1) HD Consumables (mitigate cost pressure) 2) Home Dialysis Installation (single plumbing contract) 3) Kidney Perfusion (case to reduce cost of consumables) 4) PD Purchasing (Renew contract to reduce costs) 5) Sample Transportation (Change provider to NWL to reduce costs and double charging) <p>What will be different/better? State specifically the quantitative and qualitative benefits and changes that the PID will realise.</p>	5/6/2020 8:35:04 PM	Implementation	🔗

Summary

Milestones in Next Month

All Milestones

Milestone Type
All

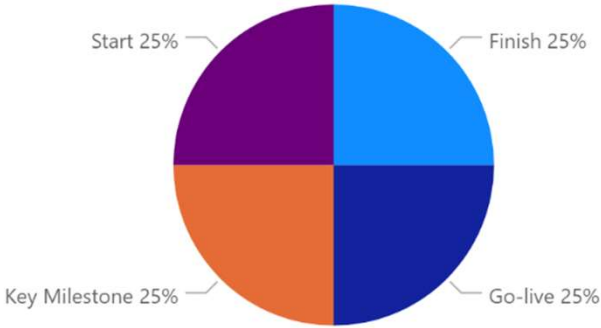
Start Date
5/24/2020 8/9/2020



Finish Date
5/28/2020 8/14/2020

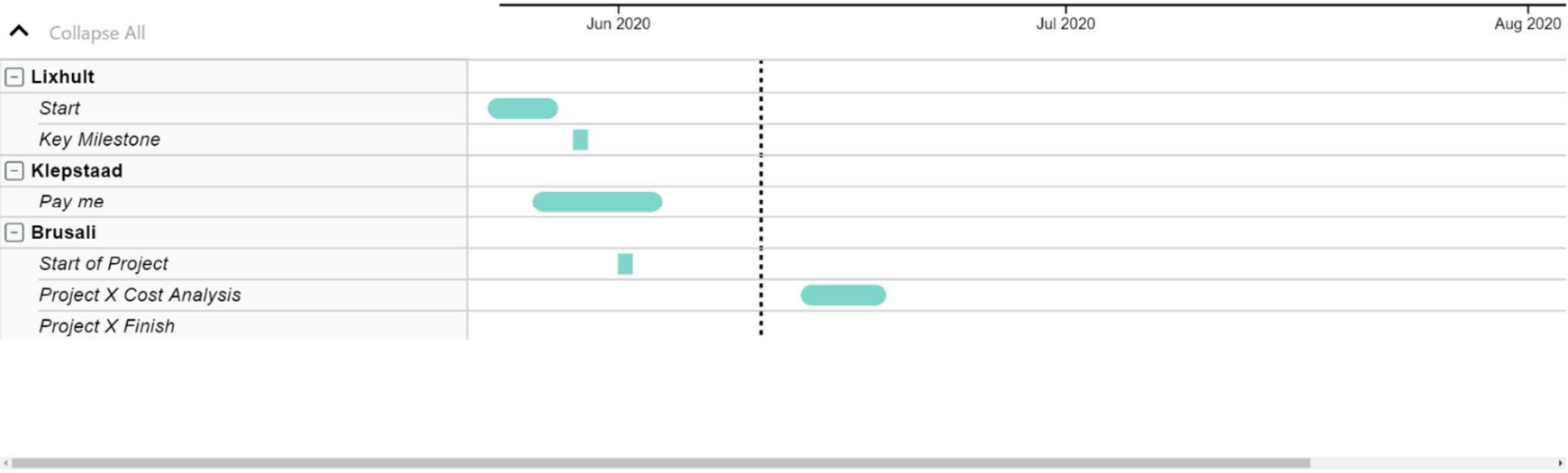


PIDs by Milestone Types



Milestones

Collapse All



Report Filters

- Division: All
- Directorates: All
- Speciality: All
- Project Manager Name: All

Page Filters

All Milestones



PID	Milestone Name	Milestone Description	Type	Start Date	Finish Date	Record Link
Klepstaad	Pay me		Key Milestone	27/05/2020	04/06/2020	🔗
Lixhult	Start	Jack	Start	24/05/2020	28/05/2020	🔗
Lixhult	Key Milestone	Key Milestone	Key Milestone	29/05/2020	29/05/2020	🔗
Brusali	Project X Cost Analysis	Project X Cost Analysis	Key Milestone	14/06/2020	19/06/2020	🔗
Brusali	Project X Finish	Project X Finish	Finish	09/08/2020	14/08/2020	🔗
Brusali	Start of Project	Start of Project X	Start	01/06/2020	01/06/2020	🔗

Total **28/05/2020**

Report Filters

Division

All ▼

Directorates

All ▼

Speciality

All ▼



Project Manager Name

All ▼

Page Filters

Milestone Type

All ▼

Risks

Risks without Mitigation
8

No. of Risks
10

Report Filters

Division
All

Directorates
All

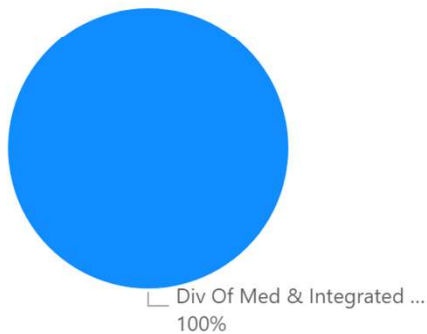
Speciality
All



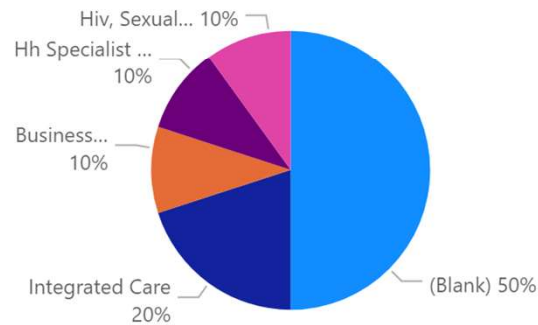
Project Manager Name
All

Page Filters

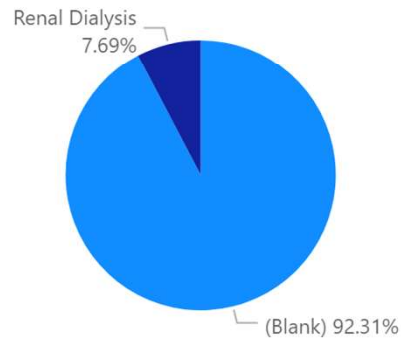
PIDs with Risks by Division



PIDs with Risks by Directorate



PIDs with Risks by Speciality



PID	Risk Name	Risk Description	Mitigation Actions	Impact	Display	Risk Rating	Record Link
AMBT	Coffee unavailable	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur sed posuere felis. Mauris ullamcorper tempus mi. Proin sed tristique nisl. Duis ac tempus nunc, ac sagittis ante. Nunc pretium, risus sit amet accumsan pretium, est ante tempus lorem, a egestas erat turpis vel velit. Phasellus sed mauris congue, laoreet risus et, vehicula turpis. Quisque semper purus eu magna aliquam, non rhoncus lacus porta. In sed dui ipsum. Vivamus scelerisque nisi nec tellus dapibus gravida.	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur sed posuere felis. Mauris ullamcorper tempus mi. Proin sed tristique nisl. Duis ac tempus nunc, ac sagittis ante. Nunc pretium, risus sit amet accumsan pretium, est ante tempus lorem, a egestas erat turpis vel velit. Phasellus sed mauris congue, laoreet risus et, vehicula turpis. Quisque semper purus eu magna	5 - Catastrophic	3 - Possible	15	🔗

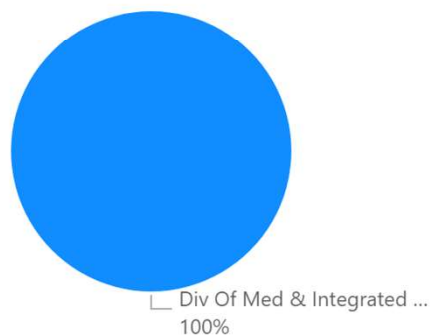
Total

44

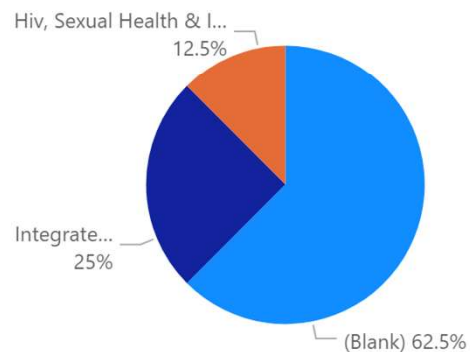
Open Issues

Number of Issues	Issues due in last 30 Days	Issues due in next 30 Days
6	2	3

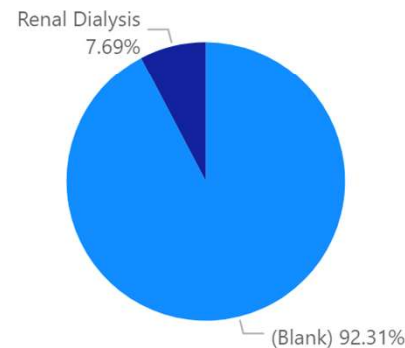
PIDs with Issues by Division



PIDs with Issues by Directorate



PIDs with Issues by Speciality



PID	Issue Name	Resolution	Due Date	Impact	Record Link
Lixhult	Selphy unavailable as required	Show issues past due date	03/06/2020		Link
Lixhult	V.Catalan Reduction in Force	Fix the issue as soon as possible	30/06/2020		Link
Fistula	BOL JRS unavailable		07/05/2020		Link
Brimnes	Resource availability	No resolution	21/05/2020		Link
AMBT	Biscuits have disappeared	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur sed posuere felis. Mauris ullamcorper tempus mi. Proin sed tristique nisl. Duis ac tempus nunc, ac sagittis ante. Nunc pretium, risus sit amet accumsan pretium, est ante tempus lorem, a egestas erat turpis vel velit. Phasellus sed mauris congue, laoreet risus et, vehicula turpis. Quisque semper purus eu magna aliquam, non rhoncus lacus porta. In sed dui ipsum. Vivamus scelerisque nisi nec tellus dapibus gravida.</p> <p>Sed enim libero, tempor sit amet magna sed, faucibus lobortis purus. Pellentesque nec erat augue. Nunc auctor lectus leo. In et</p>	17/06/2020	4 - Major	Link

Report Filters

Division

All ▼

Directorates

All ▼

Speciality

All ▼

Project Manager Name

All ▼

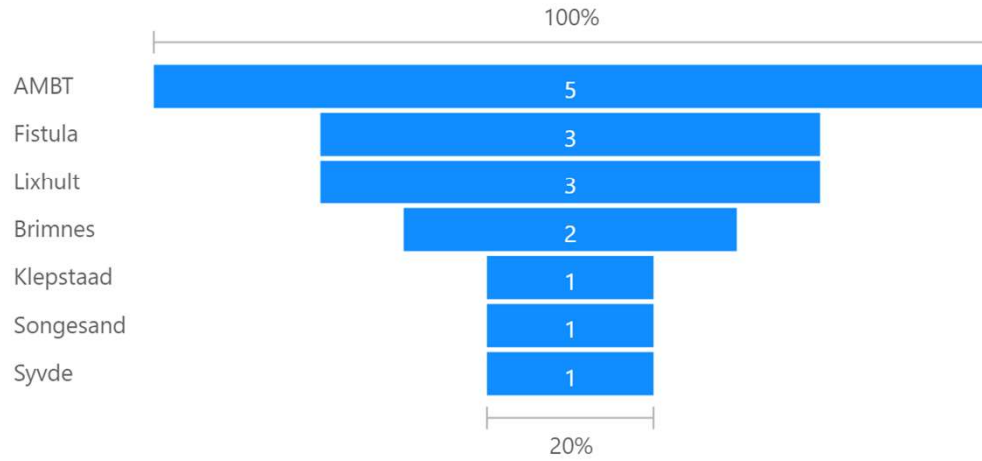
Page Filters

Due Date Filter

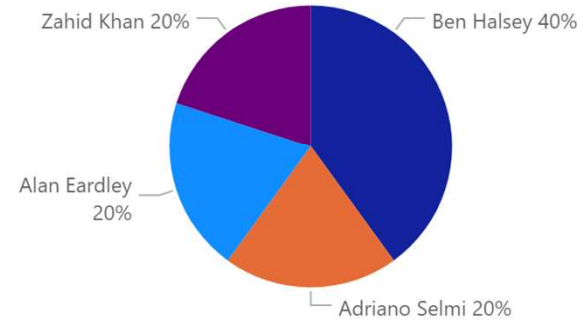
- ^ 2020
- ▼ Qtr 1
- ▼ Qtr 2
- ▼ Qtr 3
- ▼ Qtr 4

Risks & Issues

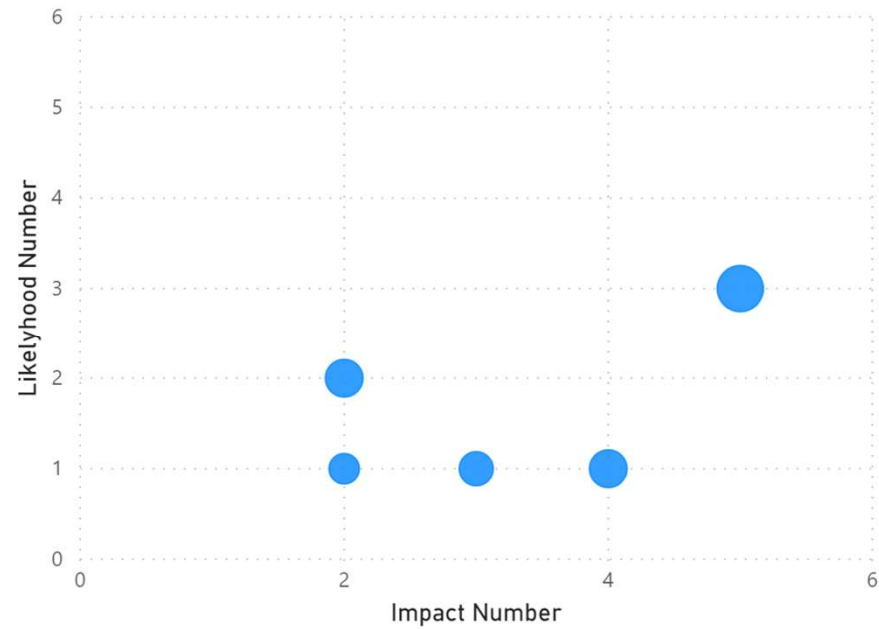
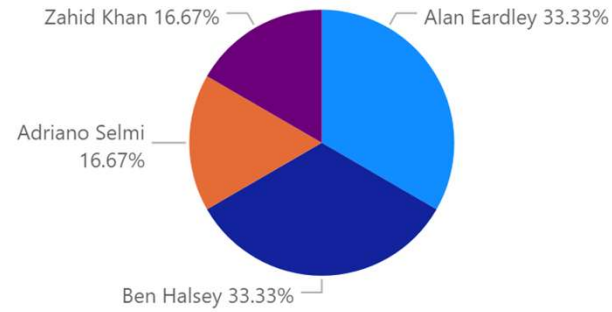
Combined Risks & Issues by PID



Risk count by PM



Issue count by PM



Risks without Mitigation

PID	Record Link
Songesand	
DuraBrtite de-selected	↻
Syvde	
Value Proposition Design timelines	↻

Report Filters

Division

All

Directorates

All

Speciality

All



Project Manager Name

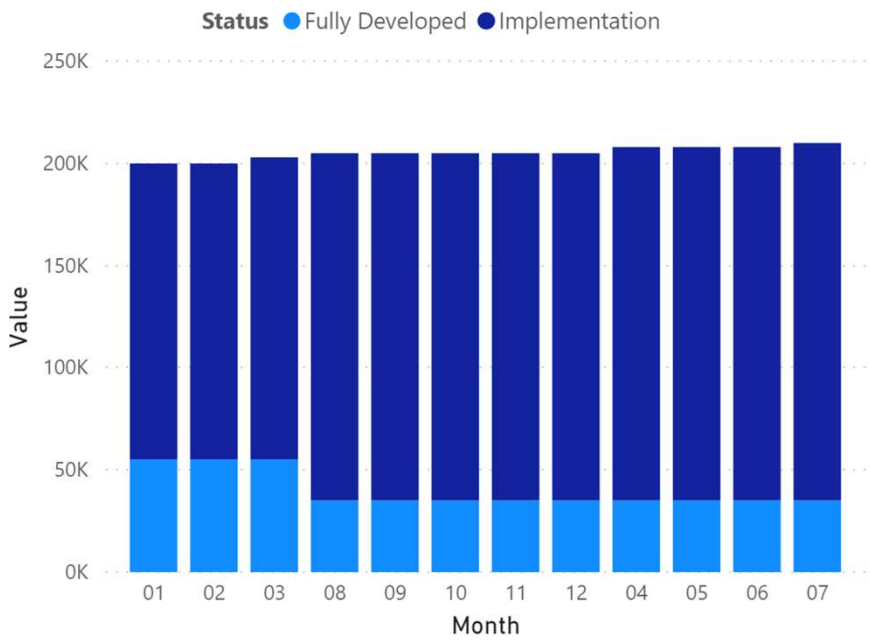
All

Page Filters

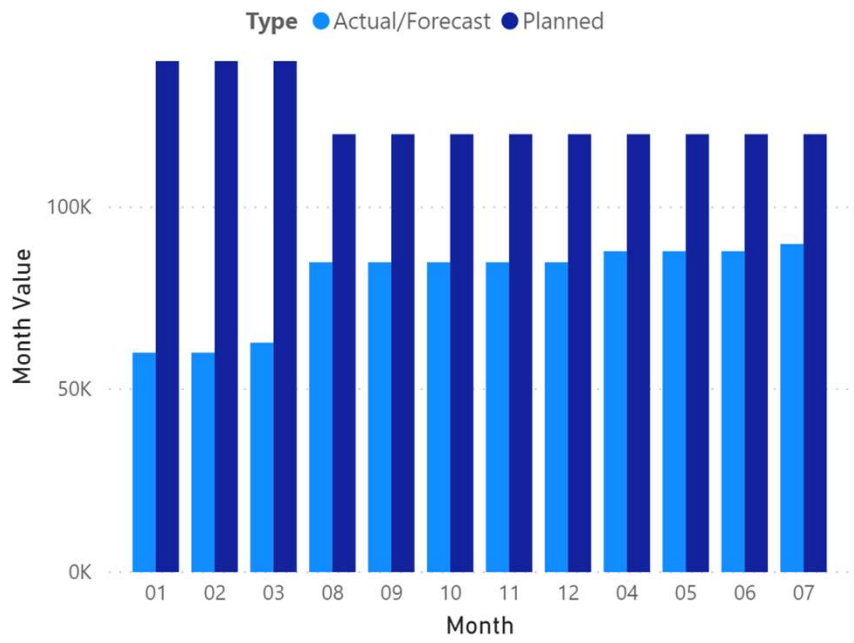
Finance Summary

Financial Year	2020/2021											
Division	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	
<input type="checkbox"/> Div Of Med & Integrated Care	200,000.00	200,000.00	203,000.00	208,000.00	208,000.00	208,000.00	210,000.00	205,000.00	205,000.00	205,000.00	205,000.00	
<input type="checkbox"/>	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00
<input type="checkbox"/> Lixhult	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00	30,000.00
<input type="checkbox"/> Administration R&D	25,000.00	25,000.00	25,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00
<input type="checkbox"/> Lommarp	25,000.00	25,000.00	25,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00	5,000.00
<input type="checkbox"/> Business Partnering	125,000.00	125,000.00	125,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00	150,000.00
<input type="checkbox"/> Total	200,000.00	200,000.00	203,000.00	208,000.00	208,000.00	208,000.00	210,000.00	205,000.00	205,000.00	205,000.00	205,000.00	205,000.00

Value by Month and Status



Month Value by Month and Type



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Directorates

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Project Manager Name

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Input Type

Financial Year

Finance Variance

Financial Year

Month

2020/2021

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Directorate	In Month - Plan	In Month - Actual	In Month - Variance	YTD - Plan	YTD - Actual	YTD - Variance	Full Year - Plan	Full Year - Actual	Full Year - Variance	Forecast CIP Achievement
Integrated Care	10,000.00	10,000.00	0.00	10,000.00	10,000.00	0.00	120,000.00	137,000.00	17,000.00	114%
Administration R&D	25,000.00	0.00	-25,000.00	25,000.00	0.00	25,000.00	120,000.00	0.00	-120,000.00	0%
	30,000.00	0.00	-30,000.00	30,000.00	0.00	30,000.00	360,000.00	0.00	-360,000.00	0%
Business Partnering	75,000.00	50,000.00	-25,000.00	75,000.00	50,000.00	25,000.00	900,000.00	825,000.00	-75,000.00	92%
Total	140,000.00	60,000.00	-80,000.00	140,000.00	60,000.00	80,000.00	1,500,000.00	962,000.00	-538,000.00	64%

	Trust Theme	In Month - Plan	In Month - Actual	In Month - Variance	YTD - Plan	YTD - Actual	YTD - Variance	Full Year - Plan	Full Year - Actual	Full Year - Variance	Forecast CIP Achievement
Capital	ICT	25,000.00	0.00	-25,000.00	25,000.00	0.00	25,000.00	120,000.00	0.00	-120,000.00	0%
Income	NHS Income Efficiency	30,000.00	0.00	-30,000.00	30,000.00	0.00	30,000.00	360,000.00	0.00	-360,000.00	0%
Non-Pay	Pay Savings	75,000.00	50,000.00	-25,000.00	75,000.00	50,000.00	25,000.00	900,000.00	825,000.00	-75,000.00	92%
Pay	ICT	10,000.00	10,000.00	0.00	10,000.00	10,000.00	0.00	120,000.00	137,000.00	17,000.00	114%
Total		140,000.00	60,000.00	-80,000.00	140,000.00	60,000.00	80,000.00	1,500,000.00	962,000.00	-538,000.00	64%

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