Project Management Script

Welcome to the CENTRE Project Management Demonstration. As mentioned in the CENTRE Literature and throughout this web-site, CENTRE is a web-based system with 0 footprint on the user's workstation and is built using an N-Tier architecture where the Data Base back-end is MS SQL, the middle tier containing the business logic is composed of COM objects and the interface makes use of Active Server Pages. CENTRE is in its fourth re-write and all new subsystems are coded in .Net.

We login and enter the home-screen. The dashboard informs us of issued and pending change requests, open service records, workflow actions and action items from meetings. As all are links, selecting any will take us to the actual record.

Project Management can be initiated from multiple CENTRE points. We can review and initiate Project Tasks from an Incident, a Request Fulfillment, an Event, a Software Requirement, or we can enter Project Management from the top line menu.

As we enter CENTRE Projects, we see submenu selections starting with ***"my."*** These menu selections contain records related to the logged user, such as time sheets, expenses and so on.

We select 'Manage Projects' and view the returning screen. The submenus at the top are "New," "Search," and "Back to Main Menu." We select "New" to review a blank Project Screen. We go back to the "Manage Projects" screen, point our arrow to the "Show" field and select "Completed." We press "Refresh" and the system returns all projects that have been completed. We return to "Active" Projects.

The records are displayed in an ascending order. The column headers are links and if selected can re-sort the displayed records in a descending order by the selected column.

Starting from the left, the first field is the name of the Project and by selecting the link we are navigated into the main project screen.

We review this internal ITG Professional Services Project that is responsible for providing IT support to Company staff.

Starting at the top, we see the name and description of the Project. Continuing to the left column, we see the Category and Type, the related Contract and the people responsible for the project, including the project manager and other applicable staff.

The center column deals with project workdays, hours, and financial data, while the right-side column deals with the applicable dates, budgets, status and priorities. We will see shortly, at the Task level, how the budget and estimates are calculated.

The checkmarks "Track Financials" and "Perform QA Surveys" allow for Accounting System export of relevant data into CENTRE and for notification to the Quality Assurance Department to conduct quality surveys of work performed.

Any Remarks or Special Instructions may be entered in the text field below.

At this time we observe the submenu selections at the top of the screen. In the interest of time I will skip the first three from the left as obvious and start with "DAR."

Decision Analysis and Resolution is a level 3 CMMI Process Area whose purpose is to analyze possible decisions, using a formal evaluation process which evaluates identified alternatives against established criteria. This process area is also supported by formal ITG documentation of how to identify Projects as subject to DAR and how to conduct the evaluation.

The next submenu selection is "Observations." This section is reserved for Project Management general purpose entries regarding the execution of the Project work.

"Risk Management" is also a level 3 CMMI Process Area, as well as a key component of both ISO 27001:2005 and ISO 20000-1:2005. We key on this submenu and select "List All" from the returning Search Screen.

We see that there are 9 identified risks for this project. They range from physical security, to fire and related damage, to health concerns and all are addressed by mitigation plans. This process area is also supported by an Emergency Management Response Plan that provides detail for all defined risks.

We return to the "Edit Project" screen, enter "Task" and select the "List All" option. We enter "IT Support" from the returning screen.

The "Task" screen is where the bulk of "Projects" processing resides. We enter "Assign Resources" to see the names of the company personnel or consultants that will be performing the work.

The returning screen informs us of which of the available members have been selected for this task. The number in parentheses adjacent to their names represents the hours that they have billed to the task thus far.

Above the list of staff members, there are two selection fields which enable us to display available members by "Group" and by "Skill." Should you be interested in how this is defined, please view our "Labor Resources" demonstration.

The submenu above gives us the option to return to the task, to return to all project related tasks, to return to all Projects and to "Set a Labor Code."

As CENTRE is regularly interfaced with other systems, this option allows the user to set the DELTEK labor code that is relevant for this Project. DELTEK is a cost accounting system, is one of the systems that CENTRE interfaces with, and is unrelated to ITG. The other use of this code is to permit proper allocation for the CENTRE Earned Value Management calculations and reporting.

We return to the main Task screen and enter the "Resource Hours" submenu option. Here we can see, set, or adjust the budgeted hours for this "Task" by resource. To the left, we see the Resource Name followed by work hours per day applicable to this Task. As staff members are often assigned to multiple tasks, their assignment to any given task may be a fraction of a work day. In this case, we see that all staff members were allowed to bill up to 8 hours per day on this task.

Continuing to the right we see the “Budgeted Hours.” This is where we set the budget for the task. Further to the right we see the actual hours that the staff members have billed to this task. At the top we see the totals.

We return to the main Task screen and enter “Work Estimate.” The system allows us to create “Detail Estimates” by work product, or on the basis of Minimum, Most Likely and Maximum estimates. We select “Edit Estimate Detail.”

From the returning screen we select “Add Work Product.” We are presented with work products that may be applicable to this Project on the basis of its “Type” and “Category.”

We select Work Product 54 and we press “Continue.” The returning screen gives us work product estimates for Quantity “1,” Complexity Level “Low,” and Proficiency Level “Proficient.”

We enter “Edit” and modify these estimates accordingly:

- For Quantity we enter 300
- For Proficiency we maintain the current setting “Proficient”
- For Complexity we enter “High”
- For the Custom Modifier, we raise it to 1.5. This is an added modifier that allows the algorithm to take into consideration remote geographic locations, travel, and other extenuating conditions.

We press “Save.”

We notice that the estimated hours for this work product have been added to our overall estimate.

For a more detailed explanation of the Estimation utility and related algorithms, please see our “Requirements Development, Requirements Management and Release” demonstration.

We return to the “Edit Task” Screen. Risk Management for this Task is identical to the Project Risks, although each Task can have its own set of risks.

We now review the main body of the Task. We see that the Task could be subject to a “Workflow Initiation.” For an in-depth demonstration of “Workflow,” please select our related Demonstration.

Below the “Task Name” and “Task Description” text fields, we see the Predecessor Task field. None is selected at this time. If however, this Task was contingent upon the completion of another Task, the contingent task name would appear in this field.

The left column below is associated with any related geographic region, Service Record, the actual, projected and planned dates, budgeted, estimated and actual hours expended and other related costs. The right column contains People, Location and Item-related information regarding the Task, as well as a comment field.

Further below we can define related “Subtasks.”

We return to the main Projects Menu by selecting “Projects” from the Top Line Menu, and then selecting the “Administrative” option. The returning screen, “Projects, Itinerary, Time & Expense,” contains a series of submenus.

This facility provides a wide variety of management and reporting functions. We select “Search Time Sheet” and enter in the resource name “John Doe.” We press “Continue” and mark in the returned screen any of the resource records. We press “Continue” again and view Mr. Doe’s time sheet.

We see the projects and tasks that Mr. Doe is permitted to bill time. As a National Support Center staff member he has been assigned as a resource this Project. He is also allowed to bill time to G&A, Paid Holiday, Leave Without Pay, Sick Leave and Vacation.

We now return to the Main Projects Menu and select “Search Project.” From the returning screen, we select “Financial Data.” We enter the Contract Number of the IT Support Project, 5263-000, and we press “Continue.”

We select “View” Financial Summary by Category and enter an additional authorization code to view the results.

We now “View Projects Financials by Category” starting with the Summary and Schedule segments. These options will return values from the main Project screen such as Contract number, Status, Project Duration and so on.

The Earned Value Measurements Part I (Contract to Date Values) displays progress as “Projected to Date,” “Actual to Date,” “Projected to Completion” and “Actual to Completion” for Total Cost, Net Margin Labor Hours, Labor Cost Material and Installation Costs.

Further below in the “Earned Value Measurements- Part II [At Year End: 2009]” we see IT Service Management related cost data.

In the Financial Summary segment of the screen, we see budgeted, estimated and actual performance by line of accounting for each project month.

All of the above can be exported to MS Word or Excel for further processing.

This completes the CENTRE Project Management Demonstration. Thank you for your time and patience.

For a copy of this transcript and other Project Management related documents, please visit the www.itgonline.com Document Control menu option, where documents can be read or downloaded in PDF format.

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