IT Project Dashboarding

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Director of Project Management
and Project and Portfolio Dashboards

John Prette
Director of Information Technology, Alumni Association
Agenda and Housekeeping

• Agenda
  – Types and Purpose of the Dashboards
  – Institutional Examples
    • K-State & BGSU – Adam
    • George Mason - John
  – Open Discussion / Q&A

• Housekeeping
  – We’ll be intermixing our slides with live views
  – Use the Chat to ask questions at any time
Types and Purpose

• Internal IT Operational
  – IT back-office staff/project teams
• Internal IT Informational
  – IT leadership/Sponsorship
• External Informational
  – University leadership/Sponsor
• External Operational
  – University back-office staff/project teams

(Note, we are not going to keep alternating slide templates for the rest of the presentation)
The K-State / BGSU Perspective
Internal IT Operational

• Audience:
  – IT Project teams
  – IT managers

• Purpose:
  – Task and work management
  – Resource management/visibility

• Examples:
  – KSU internal in TDX
Internal IT Informational

• Audience:
  – IT Leadership
  – IT, well, anyone

• Purpose:
  – Overall status
  – Portfolio view

• Examples:
  – KSU dashboards in TDX
External to IT Informational

• Audience:
  – University Leadership/Governance
  – University, well, anyone (don’t hide from it)

• Purpose:
  – Overall status
  – Portfolio view

• Examples:
  – KSU public webpage preview
  – BGSU public webpage (previous institution)
What about External to IT Operational?

- EPMO
- Centralized PM org/standards
- Enterprise resource management
- Sounds great; I’ve never tackled it 😊
- Who has?!
That’s a good transition...
Sharing the Portfolio via a Dashboard

• Background
  – SharePoint Project Inventory started in 2014
  – Migrated to SharePoint on-line at start of 2020

• Pain Points
  • Lists and views weren’t user friendly to casual or executive level audience
  • Canned reports were out dated by the time they reached your inbox

Disclaimer – When we planned this topic, I was at George Mason University, so you’ll be seeing work from there
The Solution – Power BI

• Pointed a developer to the data and said “see what you can do”

• 2 weeks later - first dashboard with five visualizations is previewed

• Reactions
  – “That’s awesome. Where did you get all that information?”
  – “We need to show this to people!”
  – “Woah! This thing is interactive?!”
Current State

• Point in time view of things with some timeline capabilities
• Multiple views to help meet needs of various audiences
  – General Views – what’s going on and when
  – Customer View – what’s in my area
  – Audit View – how are you addressing our findings
  – Project View – what’s my status
  – Portfolio Views – who’s assigned, where are project documents, what’s happening now, things overdue or coming due
Live Demo

THE PROJECT DASHBOARD

Special thanks to George Mason University for allowing me to share this
Summary View

- Active Project Entries
- Stoplight status
- Past due, coming due
- General details
- Hover over summary
- Filters
Priority View

- Shows
  - Impact and Effort
  - Relative Sizing
- Should we do the project
- Coded by type of project / request
  - Mandate
  - Required Maintenance
  - Strategic
# Status Report, aka “Baseball Card”

## Projects Dashboard
### Status Report

**755 - Enterprise Governance and Portfolio Management Process Design and Implementation**

<table>
<thead>
<tr>
<th>Lifecycle Group</th>
<th>A001</th>
<th>Overall Priority</th>
<th>Processes</th>
<th>ITS Portfolio</th>
<th>Internal Mandate</th>
<th>Business Driver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td></td>
<td>Overall</td>
<td></td>
<td></td>
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<td></td>
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</tbody>
</table>

### Project Description

Design and implement project prioritization, tracking and governance processes including team structures, procedures to formalize investment and project intake and tracking.

### Deliverables

- Develop a Project Charter – Develop a detailed charter to outline expected outcomes, key deliverables, milestones dates, roles, and responsibilities (COMPLETE)
- Portfolio Rationalization & Roadmap Development – Review existing project and investment portfolio, confirm scope and objectives, identify common needs and opportunities for consolidation (IN PROCESS)
- Develop Service and Technology Roadmaps (per Functional Area) – Define a catalog of services and aligned technologies (MOVED TO 2022 Statement of work)
- Define Detailed Governance/Portfolio Management Structure (COMPLETE)
- Define Detailed Governance/Portfolio Management Workflows (COMPLETE)
- Enhance / Pilot the Investment Intake Process (IN PROCESS)
- Support Communications and Organizational Change Management (OCM) (IN PROCESS)

### Estimated Cost

<table>
<thead>
<tr>
<th>Mason Staff</th>
<th>Hardware, Software &amp; Licensing</th>
<th>Services</th>
<th>Total</th>
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<tbody>
<tr>
<td>$112,000</td>
<td>$0</td>
<td>$400,000</td>
<td>$512,000</td>
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</tbody>
</table>

### Points of Contact

- **Sponsor(s):**
  - Kevin Borek
  - Sponsor POC: Charlie Spann
  - Sponsor PM: Charlie Spann
  - ITS POC: Charlie Spann
  - ITS PM: Charlie Spann

### Project

<table>
<thead>
<tr>
<th>Overall Status</th>
<th>Schedule</th>
<th>Funding</th>
<th>Dependencies</th>
<th>Resource Availability</th>
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<tbody>
<tr>
<td>On Track</td>
<td>On Track</td>
<td>N/A</td>
<td></td>
<td>On Track</td>
</tr>
<tr>
<td>Status Date</td>
<td>Request Lifecycle</td>
<td>Status</td>
<td>Percent Complete</td>
<td>Project Start</td>
</tr>
<tr>
<td>03/28/22</td>
<td>3-Active</td>
<td>4-Execution</td>
<td>76% - 99%</td>
<td>05/10/21</td>
</tr>
</tbody>
</table>

### Key Accomplishments

- Completed first IRSC cycle and reported to Ways and Means on 3/11
- Additional business cases in development and under review - task becoming operational
- Draft web pages for process are developed in the sandbox environment
- Draft fall schedule created

### Next Steps

- Complete scheduling of next / follow-on meetings for IRSC
- Identify a replacement for Bill Dracos on the committee
- Refine, finalize, and post changes to the ITS Website to market governance
- Document lessons learned from first IRSC cycle and schedule follow-on meeting with group
- Complete additional business case requests
- Complete project closeout document

### Issues

- Bill Dracos, an IRSC member has announced he is leaving the University. A replacement member needs to be identified.
- The concept of thresholds needs to be addressed - what goes to the IRSC and what does not need to go through this level of governance
- Changes in PPMO team will need to transition these tasks to new owners moving forward for future cycles.

### Milestones

- 7/15/21 - Complete sprint definition for project (COMPLETE)
- 7/31/21 - Complete and publish Dashboard V1 officially (COMPLETE)
- 8/31/21 - Complete draft investment process for large project intake (COMPLETE)
- 11/1/21 - Draft Governance Process available for review (COMPLETE)
- 12/10/21 - Complete IRSC Orientation (COMPLETE)
- 03/31/22 - Complete first pilot IRSC/Ways and Means response EV3 budget cycle (COMPLETE)

**Last Refresh:** 4/20/2022 9:34:04 AM
Program Status – Multi-Project Overview

Project Dashboard
Program Reports

IT Quality Management Framework
Sponsoring Org
Information Technology Services
Program Sponsor
Program Manager
Kevin Borek
Charles Spann
Program Description
Build out consistent and repeatable Governance and IT Management processes for improved selection, implementation, and performance of IT and related business processes

Resources & Associated Projects
- Charles Spann
- Portfolio and Project Management
- Derek Kan
- Dileen Bhan
- Kevin Borek
- Maribeth Luftglass

<table>
<thead>
<tr>
<th>Lifecycle Group</th>
<th>Priority</th>
<th>ID</th>
<th>Project Description</th>
<th>Lead</th>
<th>Project End</th>
<th>Percent Complete</th>
<th>Total Estimated Cost</th>
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<tr>
<td>1 - Active</td>
<td>A001</td>
<td>673</td>
<td>ITQ Management Process Design and Implementation</td>
<td>ITS</td>
<td>04/08/22</td>
<td>100%</td>
<td>On Track</td>
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<tr>
<td>1 - Active</td>
<td>A002</td>
<td>617</td>
<td>Enterprise Governance and Portfolio Management Strategic Restructuring</td>
<td>ITS</td>
<td>04/29/22</td>
<td>76% - 99%</td>
<td>On Track</td>
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<tr>
<td>1 - Active</td>
<td>A099</td>
<td>645</td>
<td>Implement TDX Asset and Change Management (TDX Phase 2)</td>
<td>ITS</td>
<td>06/30/22</td>
<td>51% - 75%</td>
<td>Off Track</td>
<td></td>
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<tr>
<td>1 - Active</td>
<td>A010</td>
<td>643</td>
<td>ITS Portfolio Management Tool Requirements Selection and Implementation</td>
<td>ITS</td>
<td>06/30/22</td>
<td>1% - 25%</td>
<td>Off Track</td>
<td></td>
</tr>
<tr>
<td>1 - Active</td>
<td>A010</td>
<td>643</td>
<td>ITS Services Review and Analysis</td>
<td>ITS</td>
<td>02/28/22</td>
<td>100%</td>
<td>On Track</td>
<td></td>
</tr>
</tbody>
</table>

Active Project Timelines
- 673 - ITQ Management Process Design and Implementation
- 755 - Enterprise Governance and Portfolio Management Strategic Restructuring
- 617 - Implement TDX Asset and Change Management
- 645 - ITS Portfolio Management Tool Requirements Selection and Implementation
- 643 - ITS Services Review and Analysis
Audit Summary

Project Dashboard

Audit Reports

Projects by Lifecycle Status

Active Project Statuses

90% % On Track

On Track

Active Project Timelines

Audit Reports

Project Details

Lifecycle Group | Priority | ID | Project Description | Lead | Project Start | Project End | Percent Complete | Status
--- | --- | --- | --- | --- | --- | --- | --- | ---
1-Active | A001 | 673 | PPMO and PM Framework Strategic Restructuring | ITS | 06/15/20 | 09/06/22 | 100% | On Track
1-Active | A001 | 755 | Enterprise Governance and Portfolio Management Process Design and Implementation | ITS | 06/10/21 | 09/29/22 | 76% - 99% | On Track
1-Active | A002 | 617 | Implement TDX Asset and Change Management (TDX Phase 2) | ITS | 06/03/20 | 09/20/22 | 51% - 75% | On Track
1-Active | A002 | 635 | Zone-Based Firewall Reconfiguration 1 - Client and ITS Server Zones | ITS | 12/02/19 | 05/31/22 | 51% - 75% | On Track
1-Active | A003 | 775 | RSA Archer Professional Services | ITS | 08/20/21 | 05/31/22 | 51% - 75% | On Track
1-Active | A003 | 782 | M365 collaboration services governance implementation (AvePoint) | ITS | 07/26/21 | 09/29/22 | 76% - 99% | On Track
1-Active | A003 | 807 | IT Security Awareness Training Phase2 | ITS | 08/11/21 | 08/31/22 | 1% - 5% | On Track
1-Active | A004 | 789 | Pilot Dashboard In Support of a Quality Management Framework | ITS | 11/01/21 | 05/31/22 | 51% - 75% | On Track
1-Active | A004 | 791 | Integration Architecture Assessment | ITS | 05/16/20 | 07/15/22 | 0% | On Track
1-Active | A004 | 584 | Data Governance Structure | ITS | 06/07/19 | 12/31/22 | 26% - 50% | On Track

Active Projects | Priority Matrix | Queued Projects | Status Reports | Program Reports | Customer Portfolio Reports | Audit Reports | Cost Estimates | Project Dependencies | Resources | Lifecycle Documents

Last Refresh: 4/26/2022 9:34:04 AM

765 - Enterprise Governance and Portfolio Management Proc...
617 - Implement TDX Asset and Change Management (TDX P...
635 - Zone-Based Firewall Reconfiguration 1 - Client and ITS ...
762 - M365 collaboration services governance implementatio...
775 - RSA Archer Professional Services
807 - IT Security Awareness Training Phase2
Wrap Up

Q&A / Share YOUR stories/tips
Bonus Slide!

We love to collaborate
Reach out!
K-State IT - apetrea@ksu.edu
NDAA IT – jprette@nd.edu
George Mason PPMO – pmo@gmu.edu
And of course
Via the PMCG at https://connect.Educause.edu