



PMO APP Overview



Microsoft
Partner

Silver Project and Portfolio Management

Agenda

1. Solution Overview

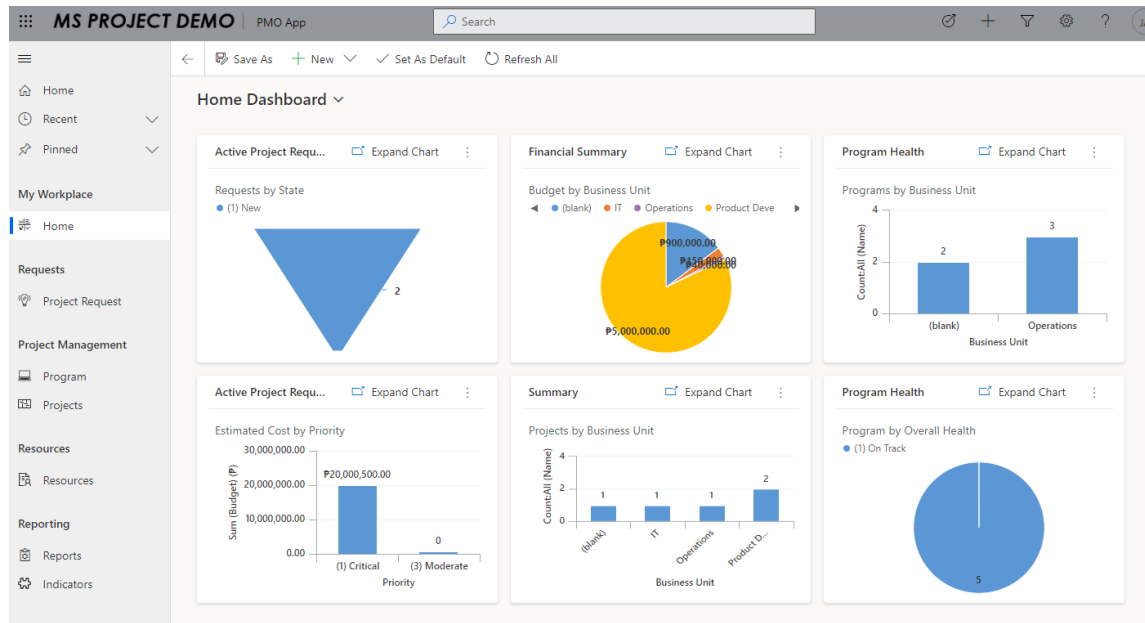
2. PMO App Functionalities

- Schedule and Task Updates
- Project Financials
- Risk and Issue Management
- Mobile Access

3. Project Dashboards (Power BI)

Solution Overview

PMO App is a lightweight project management tool, built using Microsoft Power Platform and Project for the Web, to help project management organizations effectively manage their portfolio of projects.



Key functionalities:

- Project Scheduling – Project for the Web
- Dashboard Reporting – Power BI
- Risk and Issue Management – Power Apps
- Program Management – Power Apps

Additional modules:

- Project Approval Workflow
- KPI Submission and Monitoring
- Project Dashboards (Power BI)

PMO App Functionalities

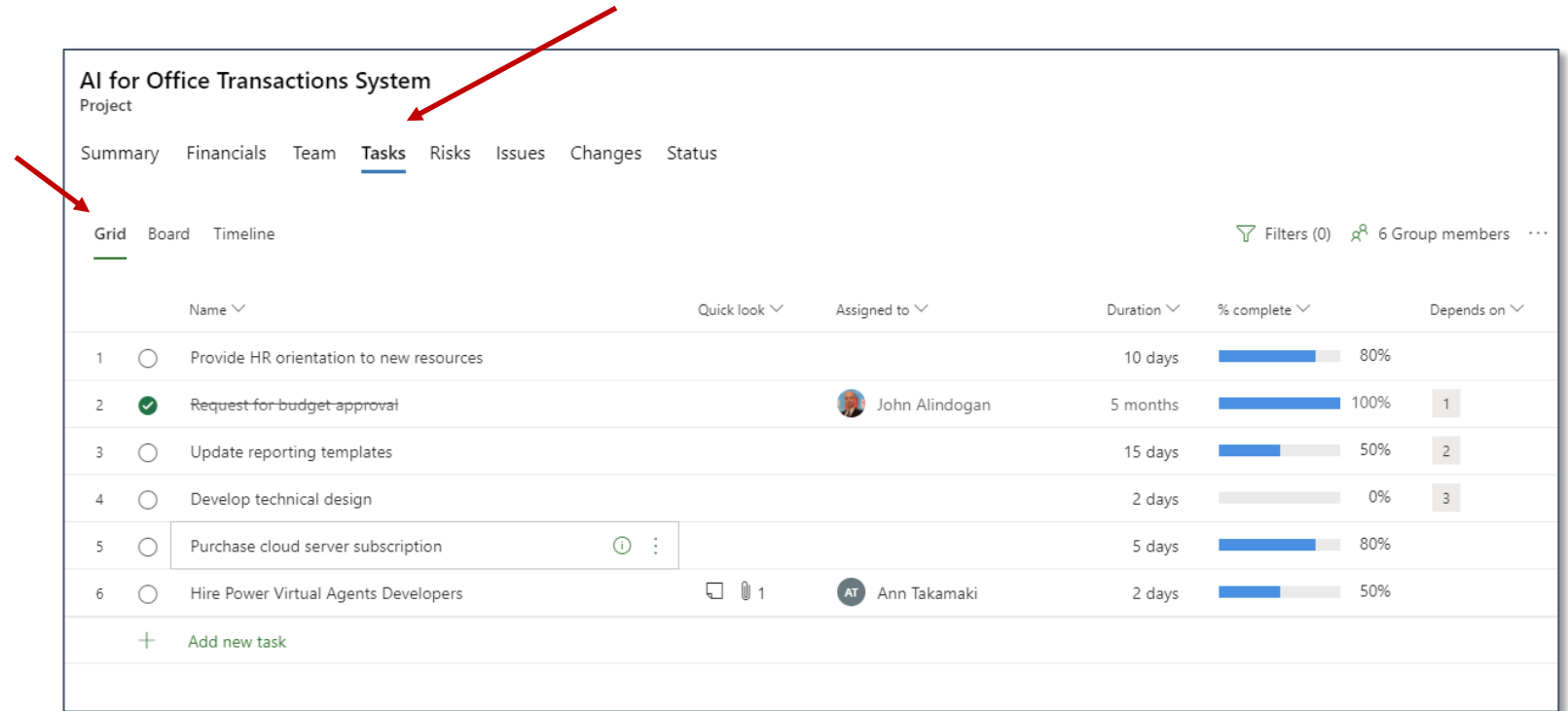
- Project Scheduling
 - Creating a new project
 - Creating Tasks
 - Updating Progress
- Dashboard Reporting
- Risk and Issue Management
- Program Management
- Resource Management

The screenshot displays the UBQTY Project Management App interface. On the left is a sidebar with navigation options: Home, Recent, Pinned, Project Management (Dashboard, Projects, Project Indicators), Program Management (Dashboard, Programs, Program Indicators), Reports (Power BI Reports), and Resources (Resources). The main content area shows the 'Email System Infrastructure Upgrade' project details under the 'Summary' tab. The 'General' section includes fields for Name, Owner (John Alindogan), Project Type (Cloud Computing), Program, Business Unit (IT), State ((2) Active), Stage, Priority ((3) Moderate), Executive Sponsor, Manager, Project Manager (John Alindogan), Calendar template (Default Work Template), and Funding Available (Yes). The 'Estimates' section shows the Estimated Start Date (3/3/2021), Duration (Days) (1.00), Finish Date (3/3/2021 5:00 PM), and % Complete (0.83). A green progress gauge is also visible, indicating 0.8 completion.

Schedule and Task Updates

Tasks (Project for the Web)

- Grid View
- Board View (Kanban)
- Timeline (Gantt Chart)



The screenshot shows the 'AI for Office Transactions System' project page. The 'Tasks' tab is selected, and the 'Grid' view is active. The tasks are listed in a table with columns for Name, Quick look, Assigned to, Duration, % complete, and Depends on.

	Name	Quick look	Assigned to	Duration	% complete	Depends on
1	Provide HR orientation to new resources			10 days	80%	
2	Request for budget approval		John Alindogan	5 months	100%	1
3	Update reporting templates			15 days	50%	2
4	Develop technical design			2 days	0%	3
5	Purchase cloud server subscription			5 days	80%	
6	Hire Power Virtual Agents Developers		Ann Takamaki	2 days	50%	

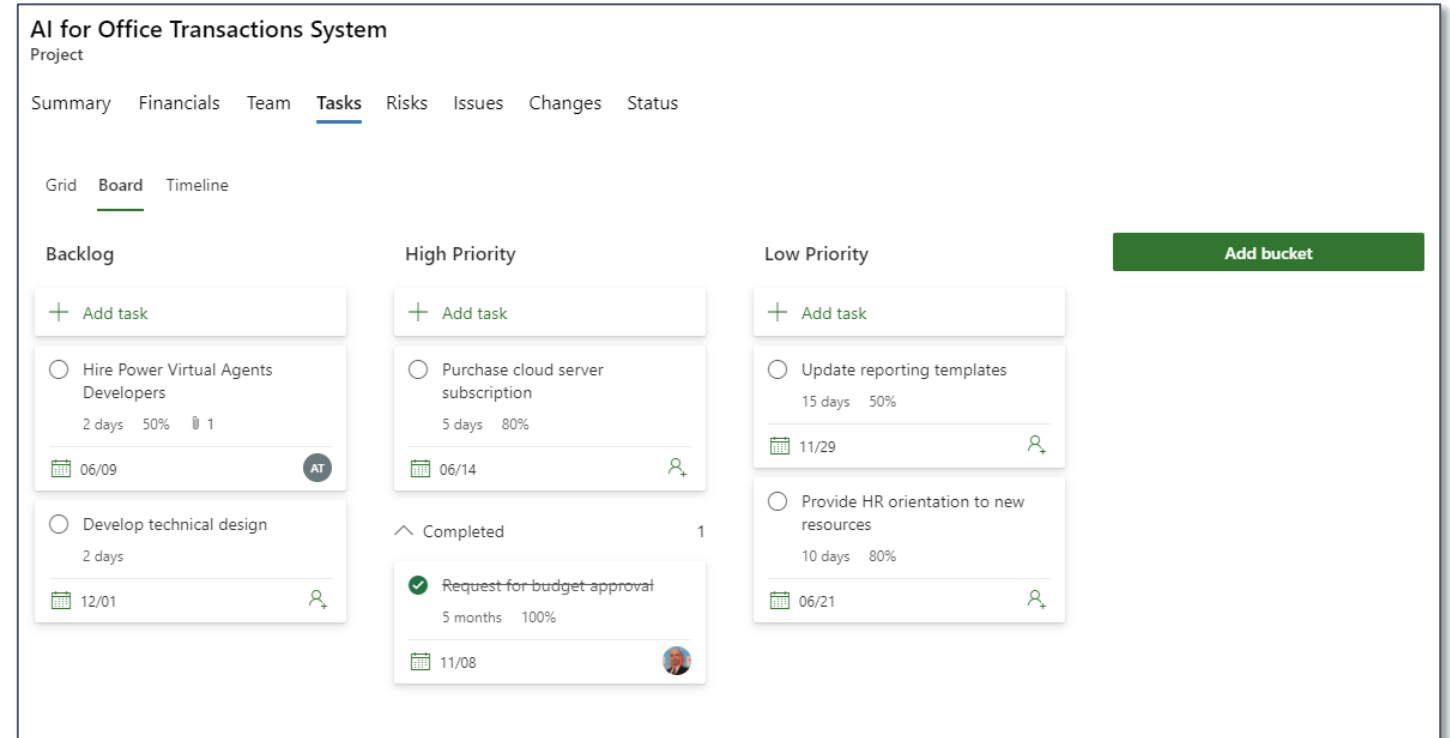
At the bottom of the table, there is a '+ Add new task' button.

PM Tip!

Project Teams have a tendency to “default” to a particular view. After a few weeks, check with the team which view they prefer!

Board View


- Use “buckets” to visually categorize tasks
- Preferred by agile organizations using Kanban methodology
- Different approaches
 - Priority
 - GTD (Getting Things Done)
 - Sprints
- Not ideal if you have multi-layered Tasks in Grid view



Activity Details

- Description / comments
- Start / Finish / Duration
- % Complete
- Bucket
- Effort (Manhours)
 - Completed
 - Remaining
 - Total
- Depends on (Predecessors)
- Attachments

Activity A



AT Ann Takamaki

This is a sample activity

Start

06/08/2021

Finish

06/09/2021

Duration

2 days

% Complete

50

Bucket

Backlog

Effort

Completed

20 hours

Remaining

20 hours

Total


40 hours

Depends on

This task doesn't depend on other tasks

Add dependency

Attachments

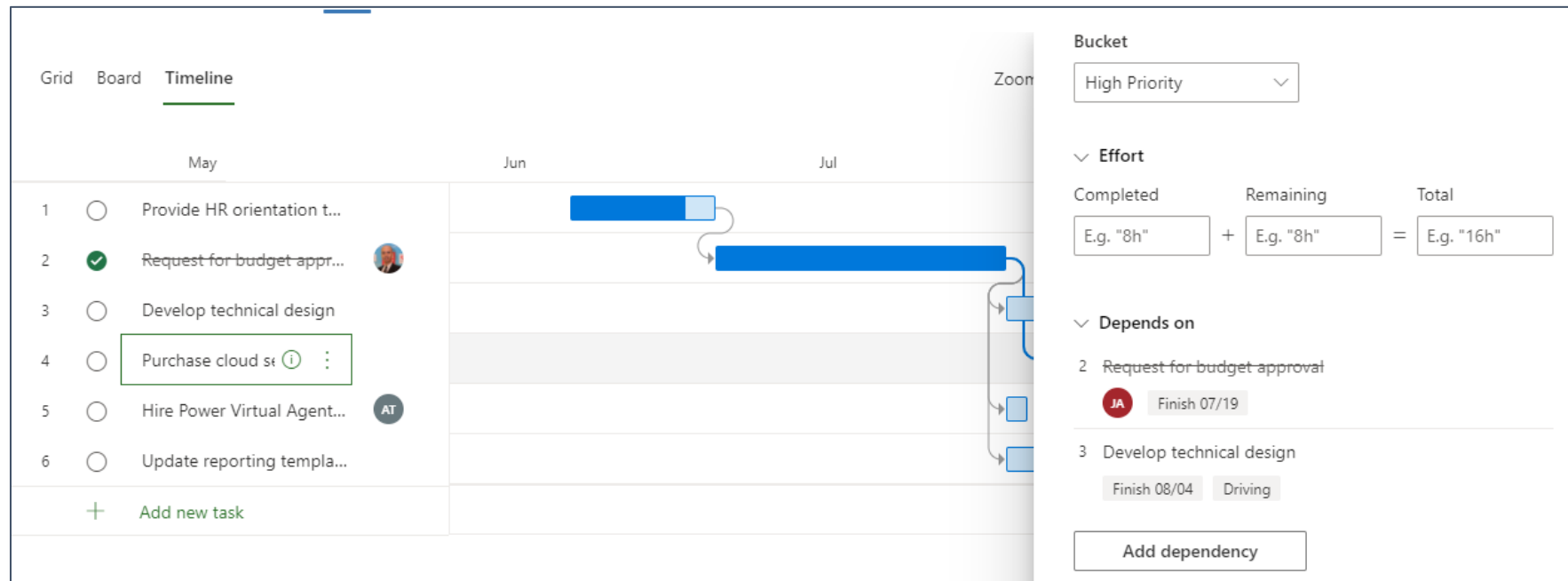


37cc763e6505ebc2ed9e425

https://ubqty.net/sharepoint.com

Add attachment

Task Dependencies



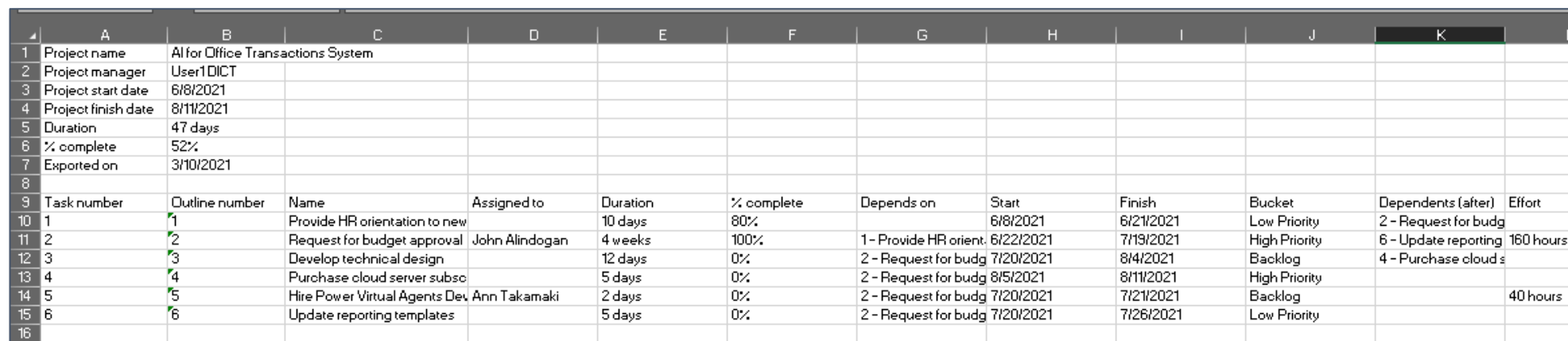
- Task dependencies are primarily FS (finish-to-start) relationship
- Refer to “Depends on” information – Finish date, Driving

Subtasks

- Make subtask (*shift+alt+right*)
- Promote subtask (*shift+alt+left*)

2.2	▼ Issue Papers	
2.2.1	Submission of Initial Topics / Brief	
2.3	Focus Group Discussion	ⓘ ⋮
2.4	Organize FGD, invite participants	⌄⌄ Make subtask
2.5	Conduct FGD	⌄⌄ Promote subtask
2.6	Finalization of topics	✂ Cut task
2.7	Terms of Reference	📄 Copy task
2.8	Clarification of Requirements	📄 Paste task
		➤📄 Insert task above

- Excel output does not have built-in formatting. You can simply update formatting directly from within Excel*

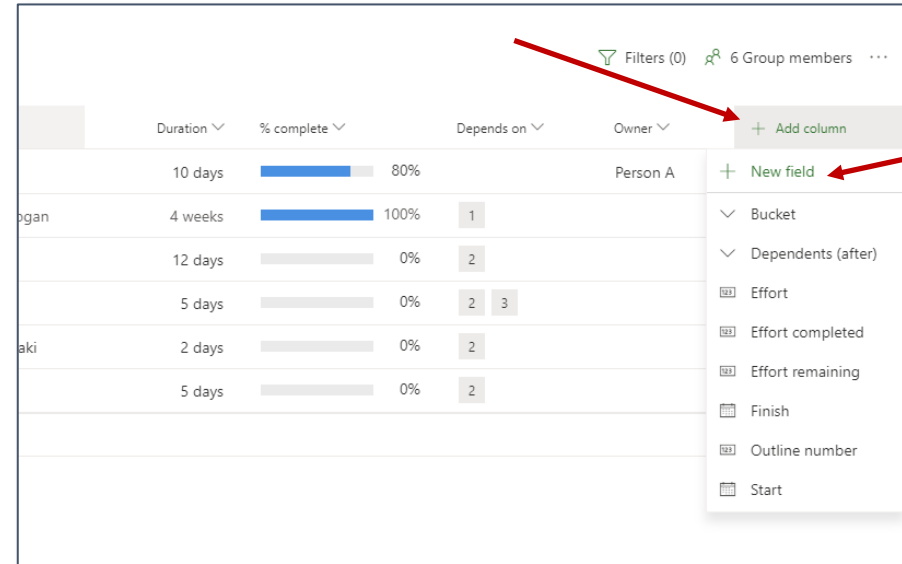


Custom Fields

- On the right-most column, click “Add column”
- Click “+ New field”
- Select field type and input the field name
- The new field will be added as an additional column from the Grid View

Note:

Custom Fields are local to the project only. This cannot be used by other projects.



New field

This field will be available to all tasks in this project.

Type

Text

Field name

Custom Field Name

Create Cancel

Project Financials

Project Financials

Input Fields:

- Budget
- Forecast
- Actual Cost
- Benefits

Auto calculate

- Remaining Budget
- Budget Variance

Note:

Click on “save” to enable calculation

AI for Office Transactions System
Project

[Summary](#)
[Financials](#)
[Team](#)
[Tasks](#)
[Risks](#)
[Issues](#)
[Changes](#)
[Status](#)

Financials

Budget	₱5,000,000.00
Forecast	₱3,000,000.00
Actual Cost	₱4,200,000.00
Remaining Budget	₱800,000.00
Budget Variance	₱2,000,000.00

Benefits

Benefits	₱8,000,000.00
ROI	0.60

General

Funding Available	Yes
Funding Source	Internal

$$\text{ROI} = (\text{Project Benefits} - \text{Project Budget}) / \text{Project Budget}$$

Risk and Issue Management

- Risk Creation

New Risk

General

General

Name

*

Work cancelation due to inclement w...

Project

📅

ICTA GCIO Cadetship Masteral Pro...

State

(1) Proposed

Owner

*

👤 John Alindogan

Assigned To

Category

Due

📅

Risk Assessment

Probability

Impact

*

🔒 Exposure

Cost

🔒 Cost Exposure

Narratives

Description




Issue

- Issue creation

New Issue

General

General Information

Name	*	---	Owner	*	 John Alindogan
Project		ICTA GCIO Cadetship Masteral Pro...	Requestor		---
State		(1) Proposed	AssignedTo		---
Issue Category		---	Priority		(3) Moderate
			Due Date		--- 

Narratives

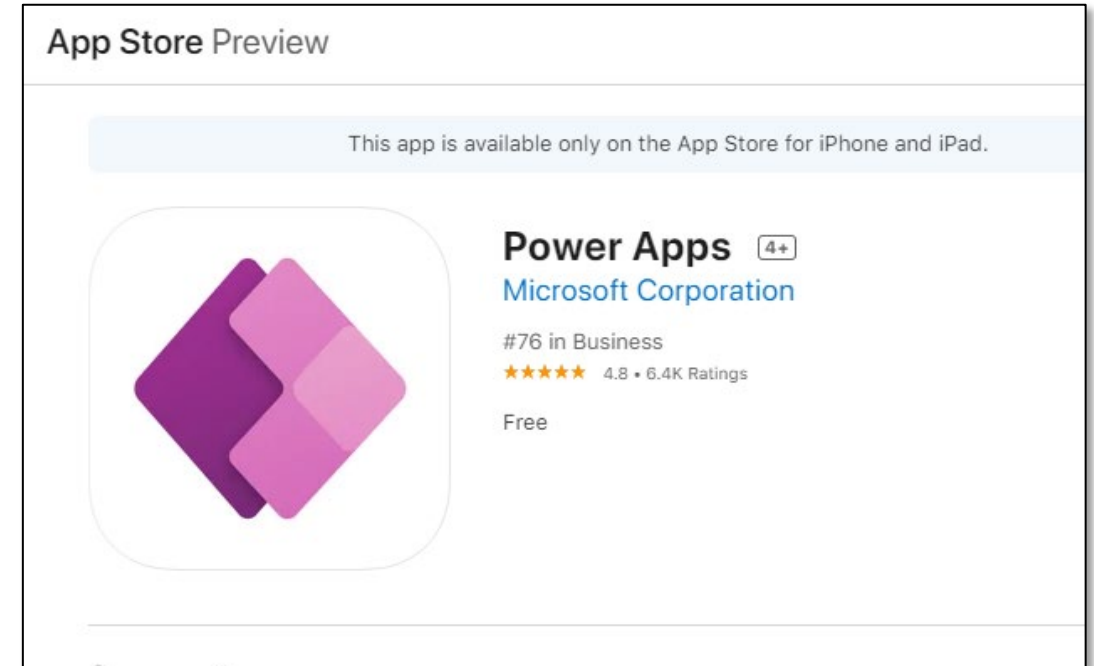
Description		---
Resolution		---

Mobile Access

- Download “Power Apps” from Play Store (Android) or App Store (iOS)
- Login and access “PMO App”

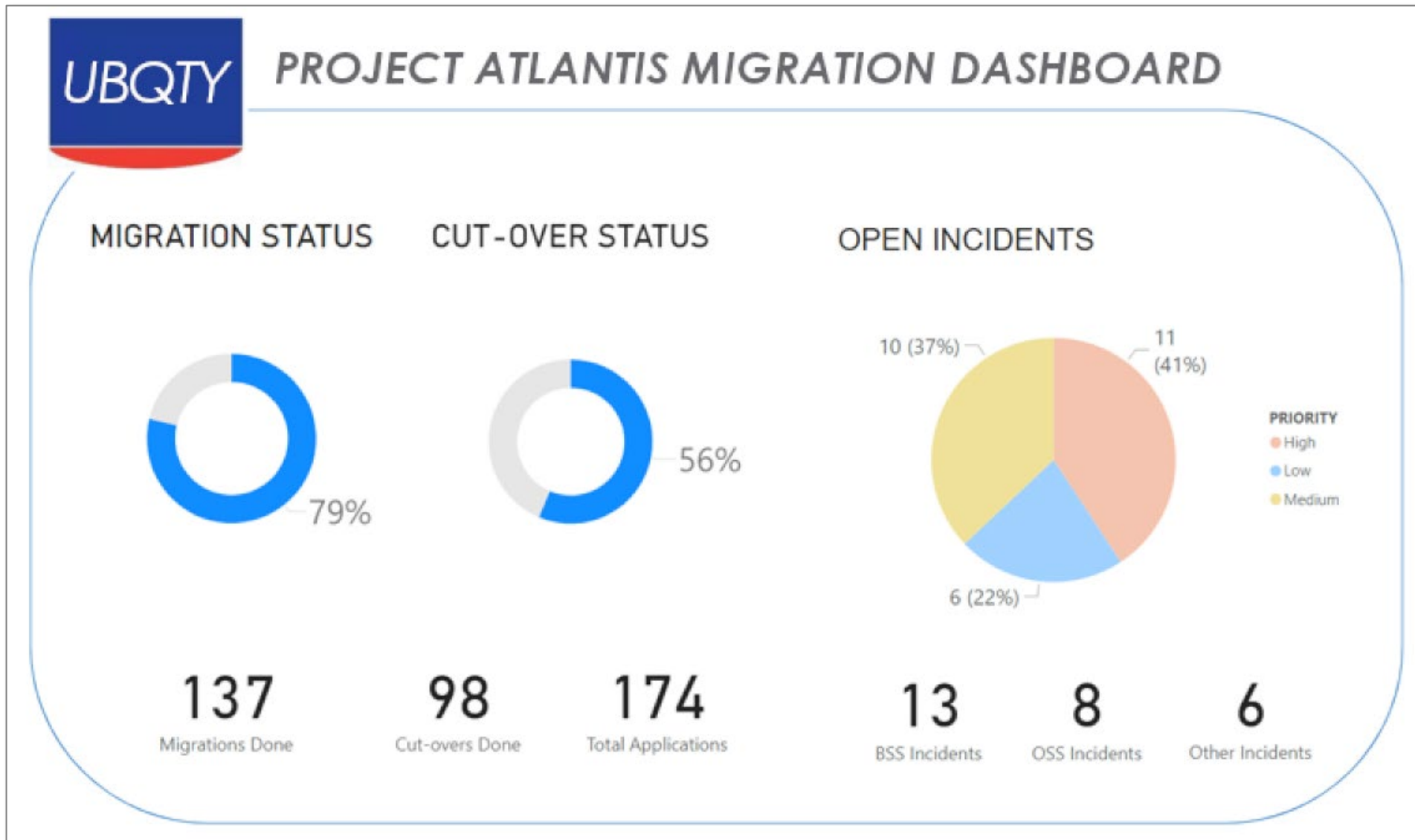
Limitation:

- Task tab function (Gantt chart/Board) not available on mobile



Project Dashboards (Power BI)

Sample project dashboards for data analysis



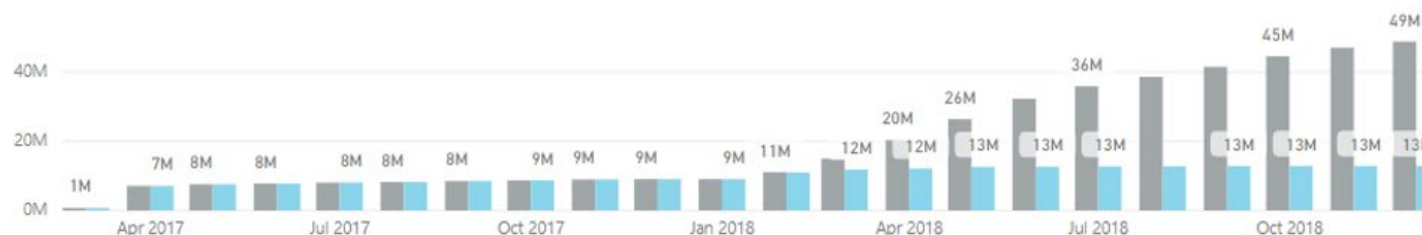
Project Summary showing key metrics retrieved from various data sources

HOUSING POC REPORT (with S-curve)



Cum Plan Cost and Cum Act Cost by TimeByDay

● Cum Plan Cost ● Cum Act Cost



Year	Month	ProjectName	Plan TaskCost	TaskActualCost	Cum Plan Cost	Cum Act Cost	Plan %	Act %
2017	March	Far East Subdivision	718,723.66	718,723.66	718,723.66	718,723.66	1.4%	1.4%
2017	April	Far East Subdivision	6,381,646.74	6,381,646.74	7,100,370.41	7,100,370.41	12.6%	12.6%
2017	May	Far East Subdivision	457,512.40	457,512.40	7,557,882.80	7,557,882.80	0.9%	0.9%
2017	June	Far East Subdivision	243,017.89	243,017.89	7,800,900.70	7,800,900.70	0.5%	0.5%
2017	July	Far East Subdivision	235,011.47	235,011.47	8,035,912.17	8,035,912.17	0.5%	0.5%
2017	August	Far East Subdivision	193,337.12	193,337.12	8,229,249.29	8,229,249.29	0.4%	0.4%
2017	September	Far East Subdivision	263,265.36	263,265.36	8,492,514.66	8,492,514.66	0.5%	0.5%
2017	October	Far East Subdivision	221,796.15	221,796.15	8,714,310.81	8,714,310.81	0.4%	0.4%
2017	November	Far East Subdivision	242,342.40	242,342.40	8,956,653.21	8,956,653.21	0.5%	0.5%
2017	December	Far East Subdivision	88,699.39	88,699.39	9,045,352.59	9,045,352.59	0.2%	0.2%
2018	January	Far East Subdivision	0.00	0.00	9,045,352.59	9,045,352.59	0.0%	0.0%
2018	February	Far East Subdivision	2,028,796.79	1,950,163.41	11,074,149.38	10,995,516.01	4.0%	3.9%
2018	March	Far East Subdivision	3,892,282.33	823,000.75	14,966,431.72	11,818,516.76	7.7%	1.6%
2018	April	Far East Subdivision	5,349,851.89	318,264.23	20,316,283.60	12,136,780.99	10.6%	0.6%
Total			48,834,677.82	12,868,692.79			96.7%	25.5%

ProjectName

Far East Subdivision

Year

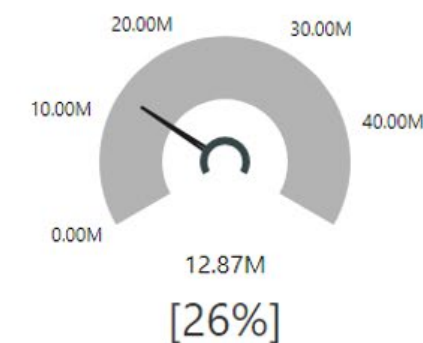
☐ Select all

☒ 2017

☒ 2018

☐ 2019

Overall Progress



S-curve Report comparing Planned Cost vs Actual Cost per month

Project Phase

All

Unit Type

All

Unit Status

- ☐ Available
- ☐ Not For Sale
- ☐ Reserved
- ☐ Sold

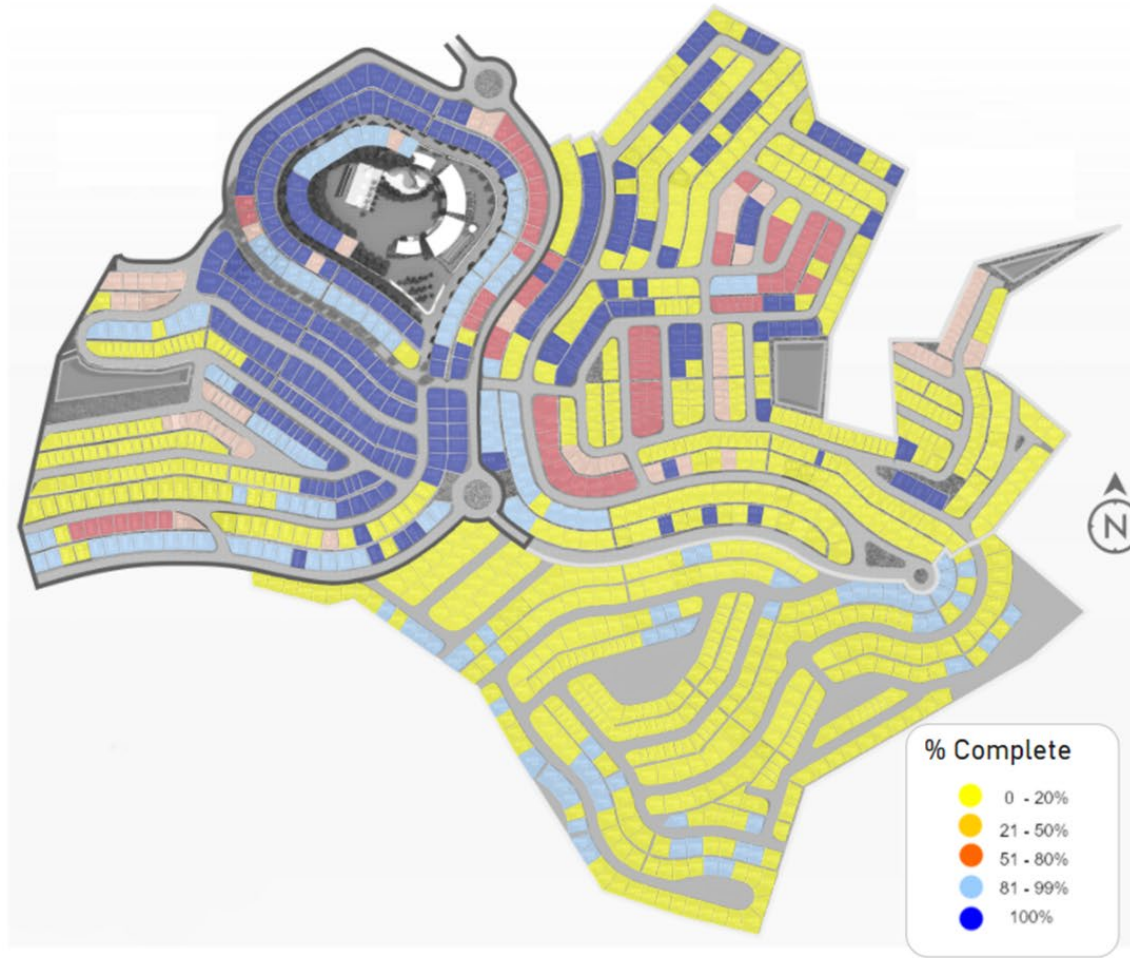
% Complete

- ☐ 0 - 20%
- ☐ 21 - 50%
- ☐ 51 - 80%
- ☐ 81 - 99%
- ☐ 100%

% Payment



Phase	Unit Number	Unit Status	Unit Type	% Complete	% Payment
	AM0000	Sold	House & Lot	50%	0%
	AM0001	Sold	House & Lot	91%	2000%
	AM0002	Available	House & Lot	47%	
	AM0003	Sold	House & Lot	91%	2000%
	AM0004	Sold	House & Lot	94%	2000%
	AM0005	Sold	House & Lot	94%	2000%
	AM0006	Sold	House & Lot	96%	2000%
	AM0007	Sold	House & Lot	89%	2500%
	AM0008	Sold	House & Lot	89%	2000%
	AM0009	Sold	House & Lot	97%	2000%
	AM0010	Sold	House & Lot	100%	2000%
	AM0011	Sold	House & Lot	100%	2000%
	AM0012	Sold	House & Lot	100%	2000%
	AM0014	Sold	House & Lot	100%	1500%



Interactive Site Map for use by Real Estate Sales to display lot availability and construction status