



Microsoft  
Partner



# PMO APP Overview

# Agenda

1. Solution Overview

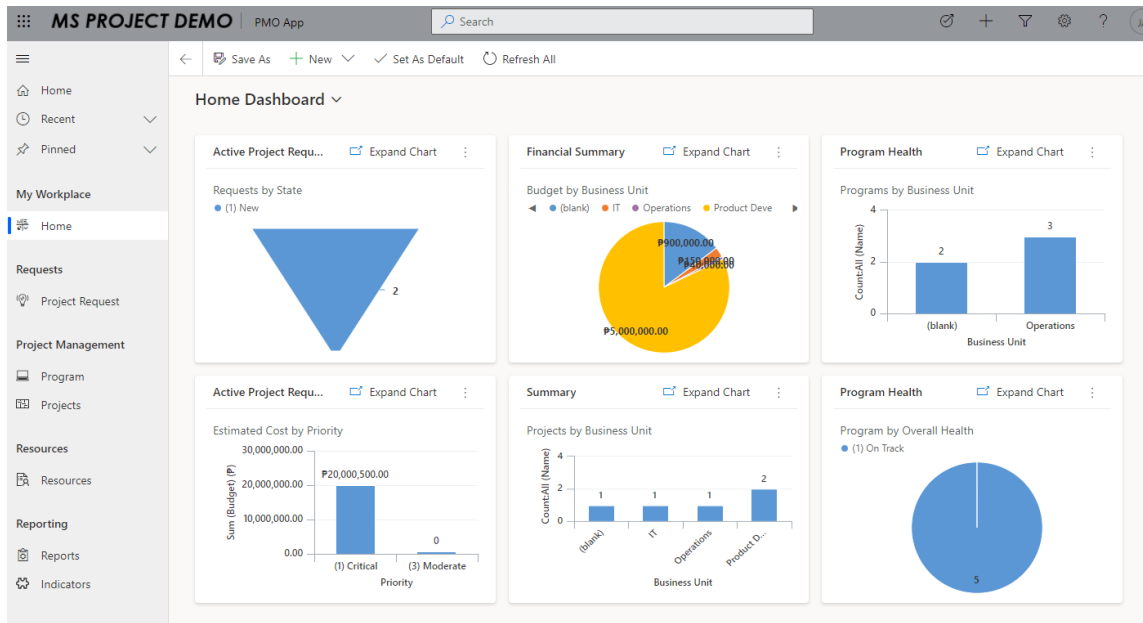
2. PMO App Functionalities

- 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:

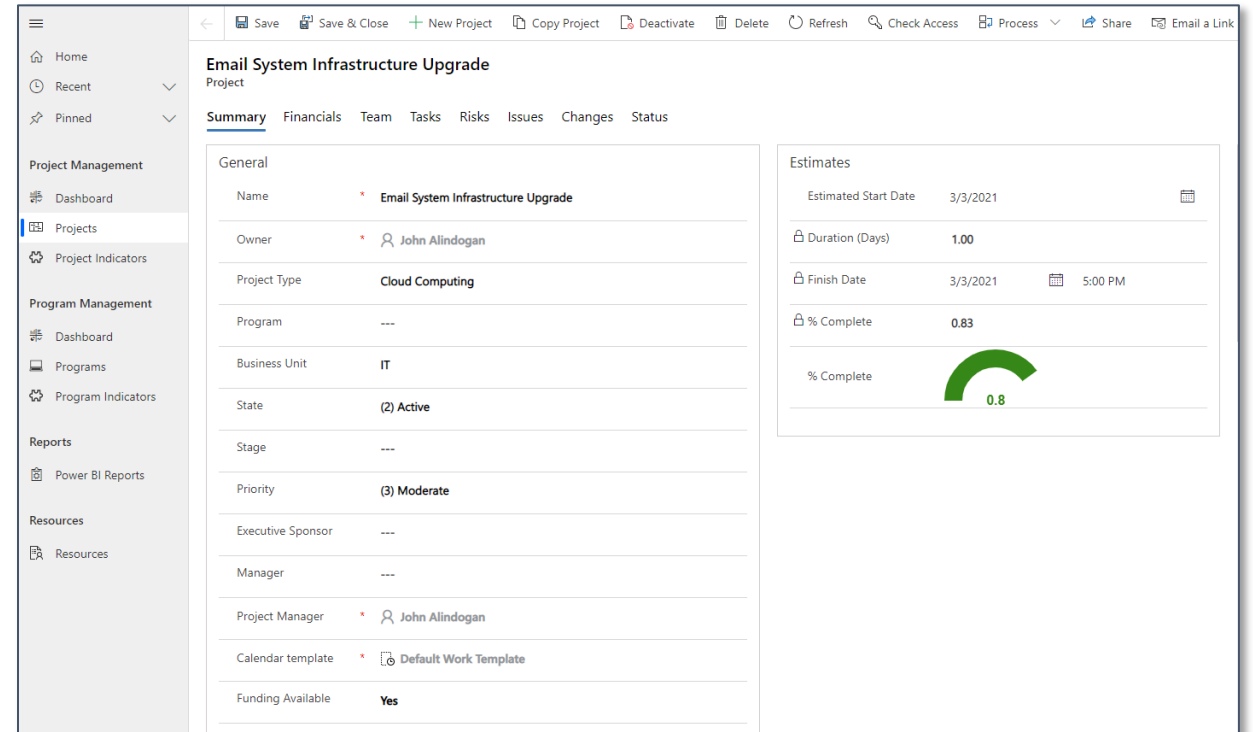
- Project Scheduling – Project for the Web
- Dashboard Reporting – Power BI
- Risk and Issue Management – Power Apps
- Program Management – Power Apps

## Additional modules:

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

# PMO App Functionalities

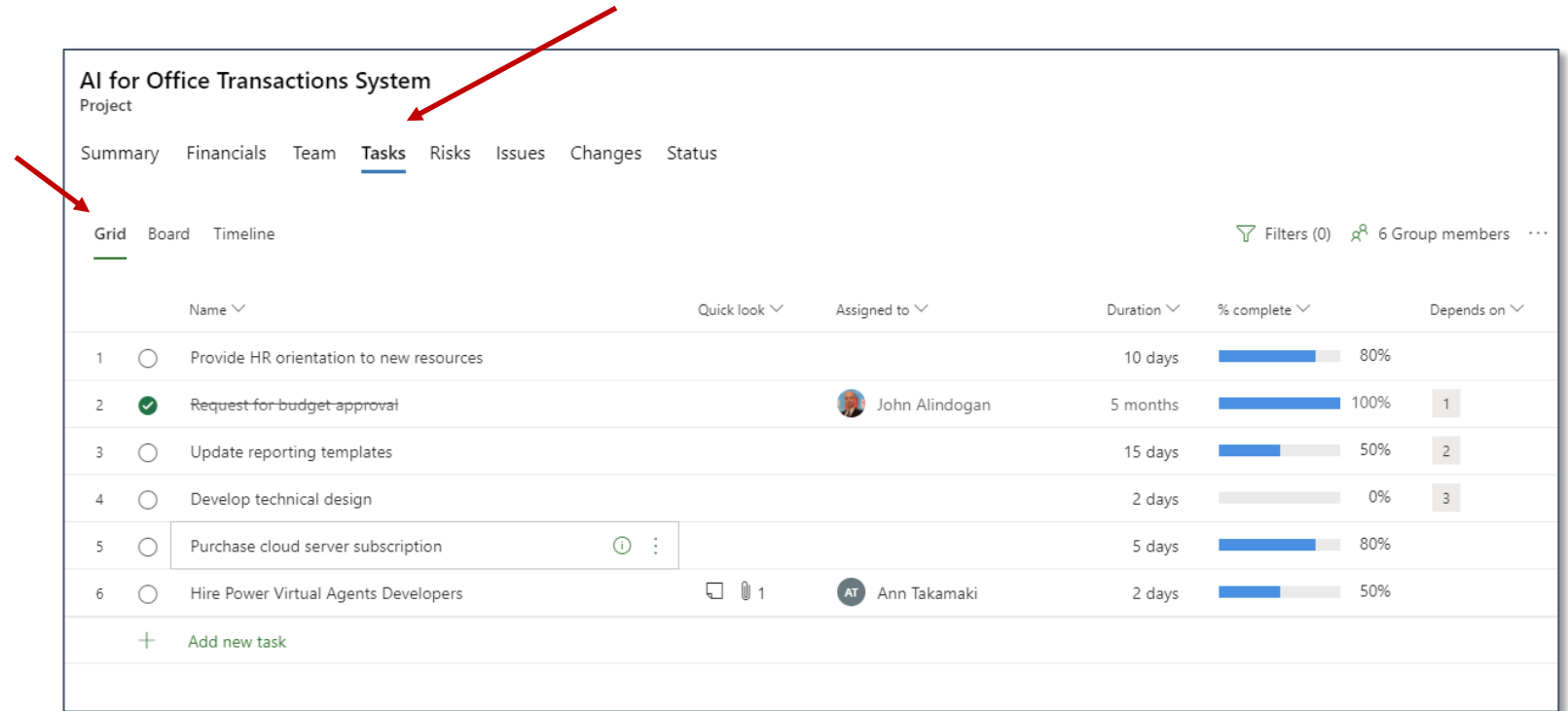
- Project Scheduling
  - Creating a new project
  - Creating Tasks
  - Updating Progress
- Dashboard Reporting
- Risk and Issue Management
- Program Management
- Resource Management



# 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%	

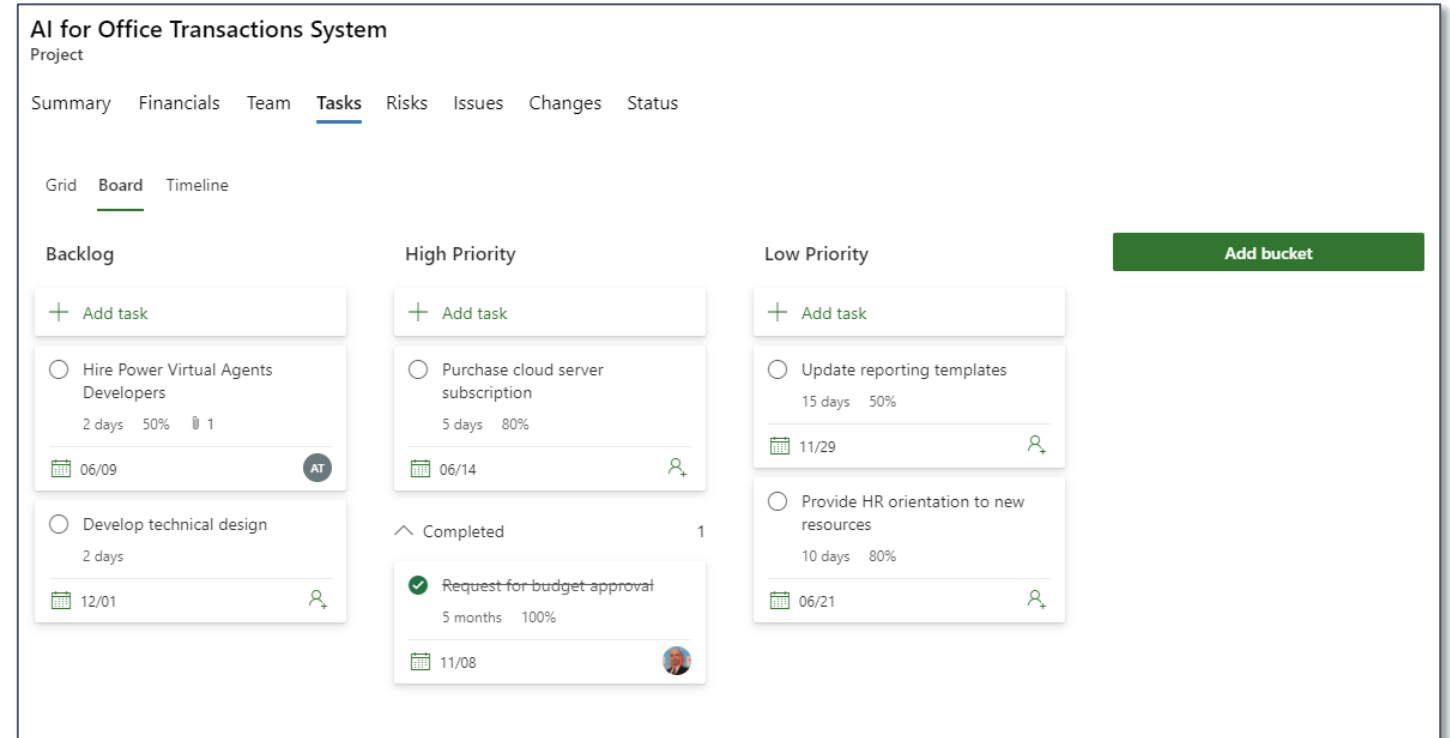
At the bottom of the table, there is a '+ Add new task' button.

## 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



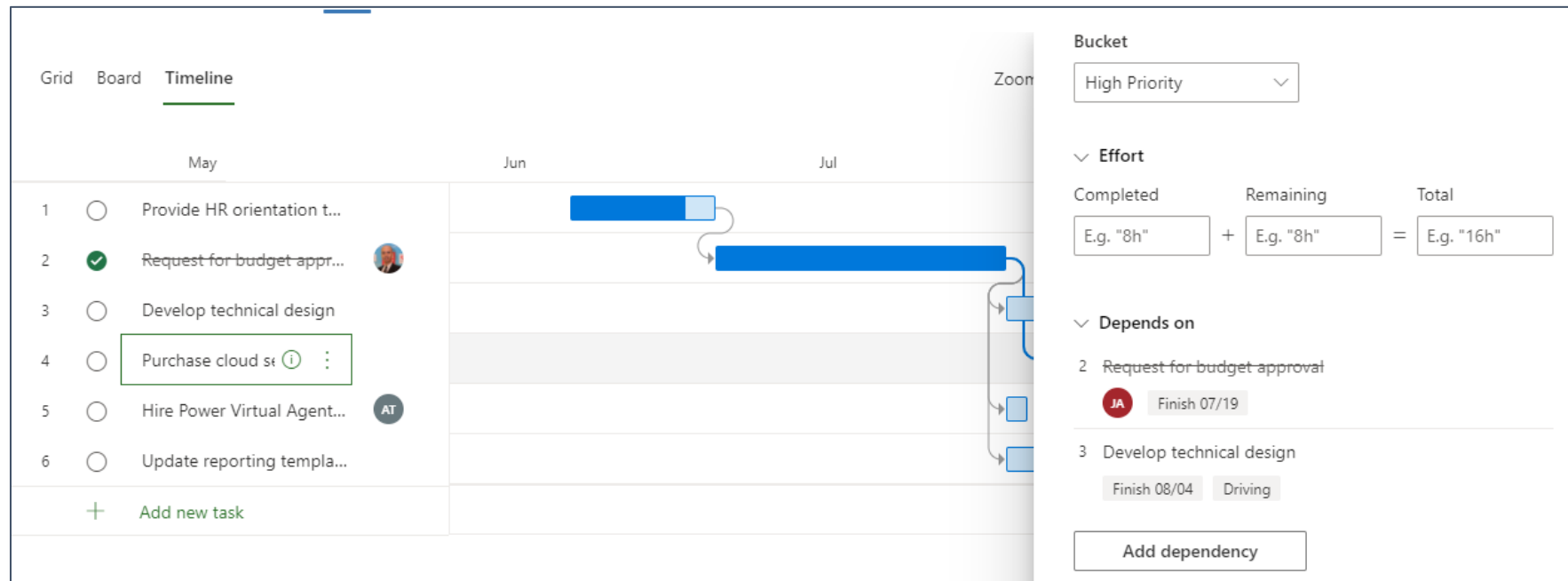
37cc763e6505ebc2ed9e425

https://ubqty.net/sharepoint.com

Add attachment



# Task Dependencies



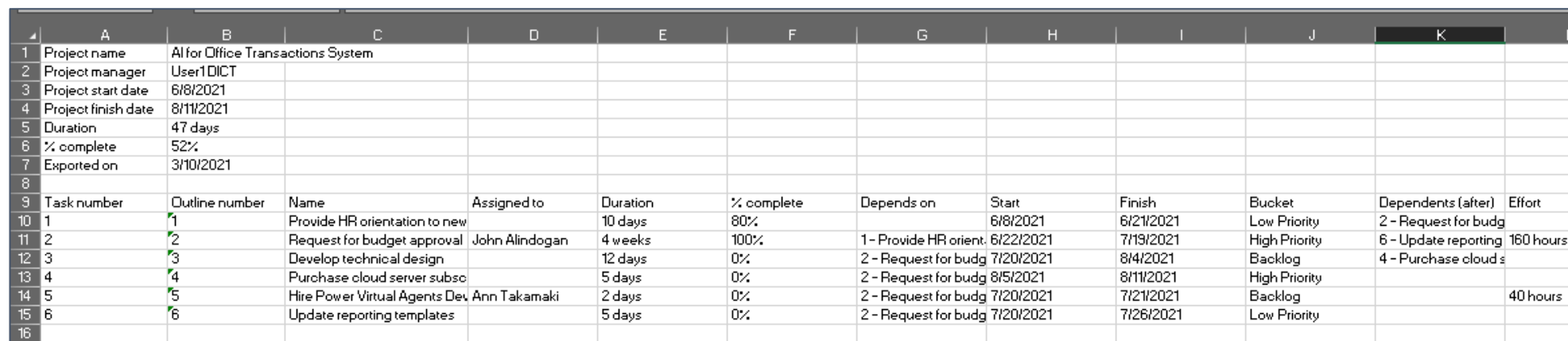
- Task dependencies are primarily FS (finish-to-start) relationship
- Refer to “Depends on” information – Finish date, Driving

# 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*

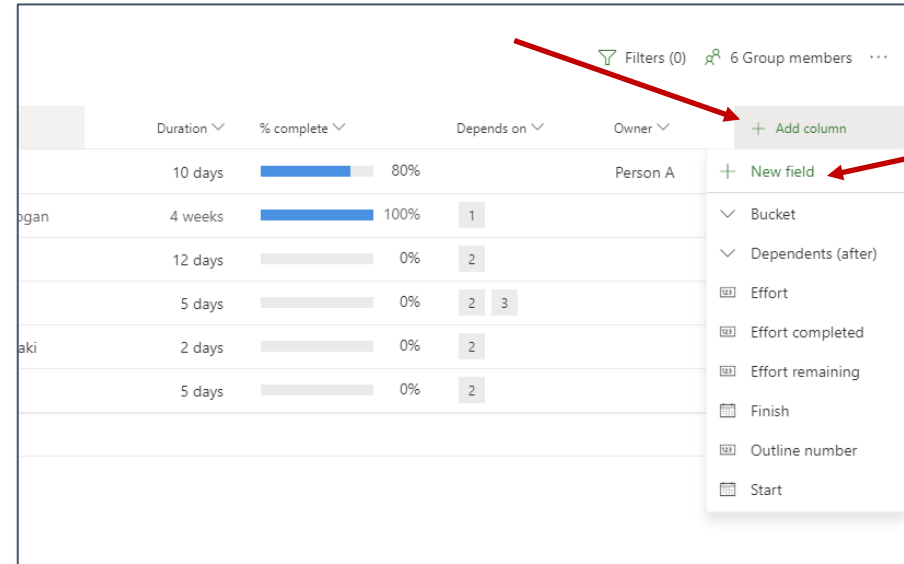


# Custom Fields

- 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

- ## New Risk

**General**

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**General**

Name	* Work cancelation due to inclement w...	Owner	* John Alindogan
Project	ICTA GCIO Cadetship Masteral Pro...	Assigned To	---
State	(1) Proposed	Category	---
		Due	---

**Risk Assessment**

Probability	---	Cost	---
Impact	* ---	Cost Exposure	---
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

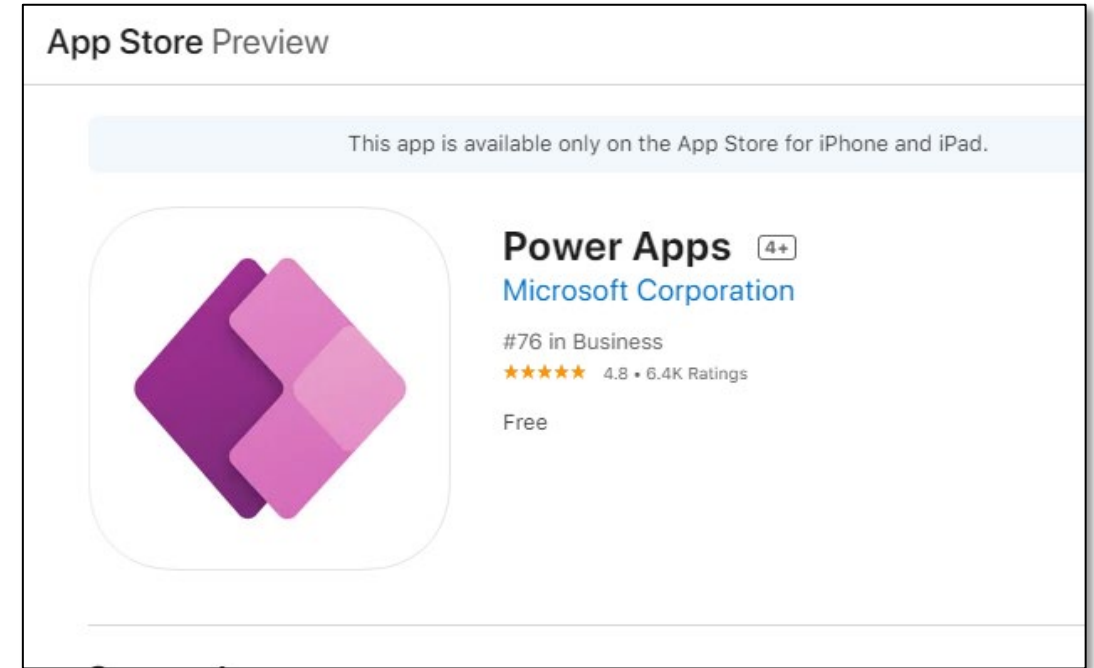
Description		---
Resolution		---

# Mobile Access

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

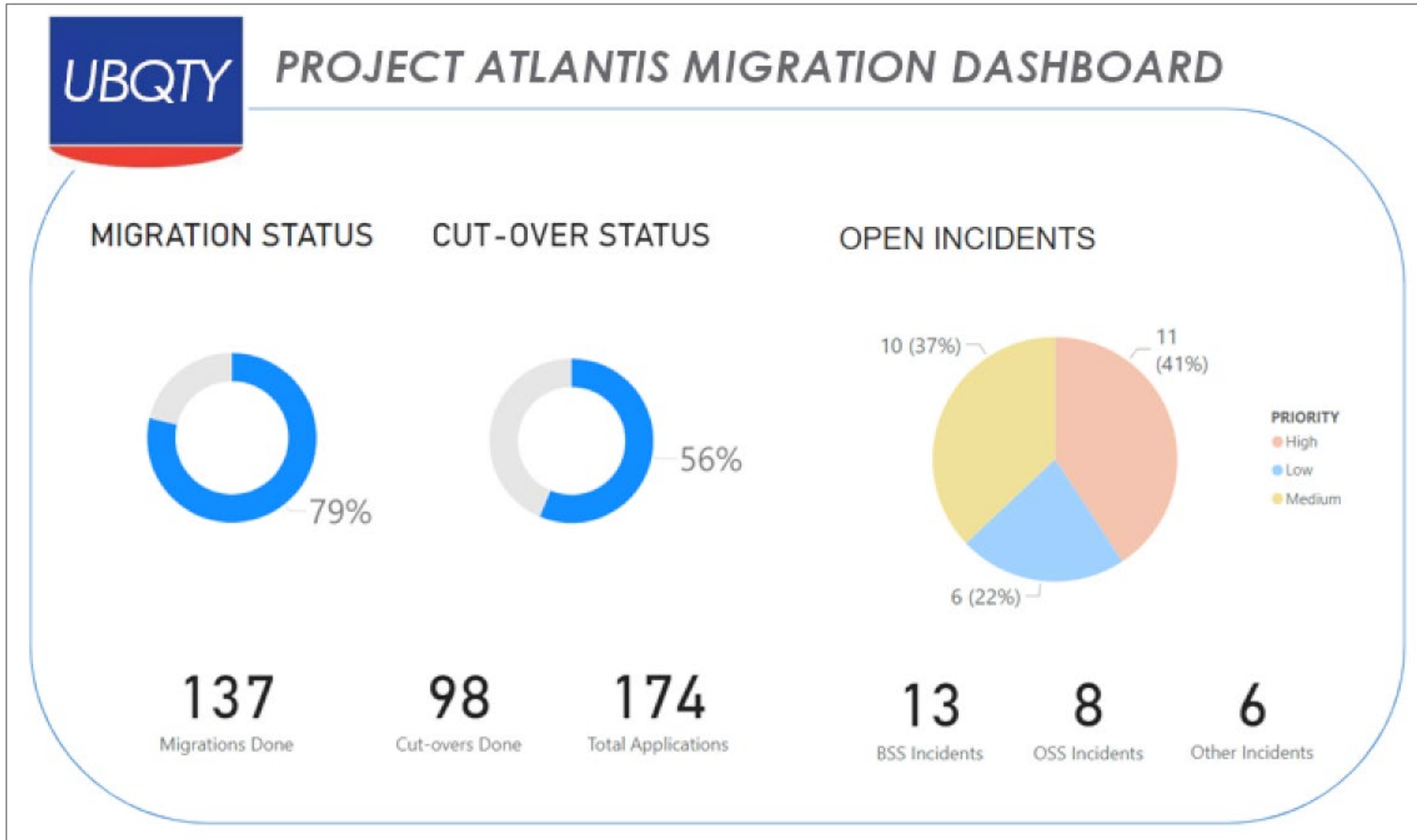
Limitation:

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



# Project Dashboards (Power BI)

Sample project dashboards for data analysis



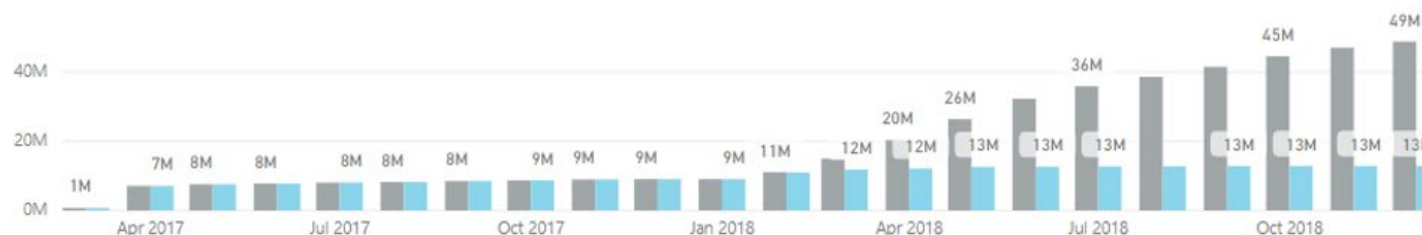
Project Summary showing key metrics retrieved from various data sources

## 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

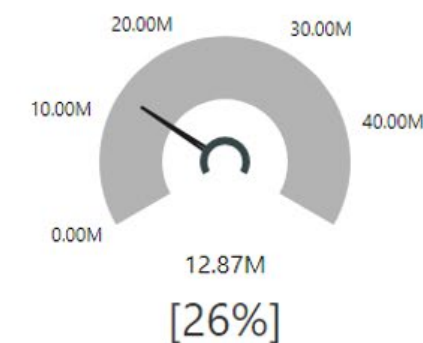
Select all

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

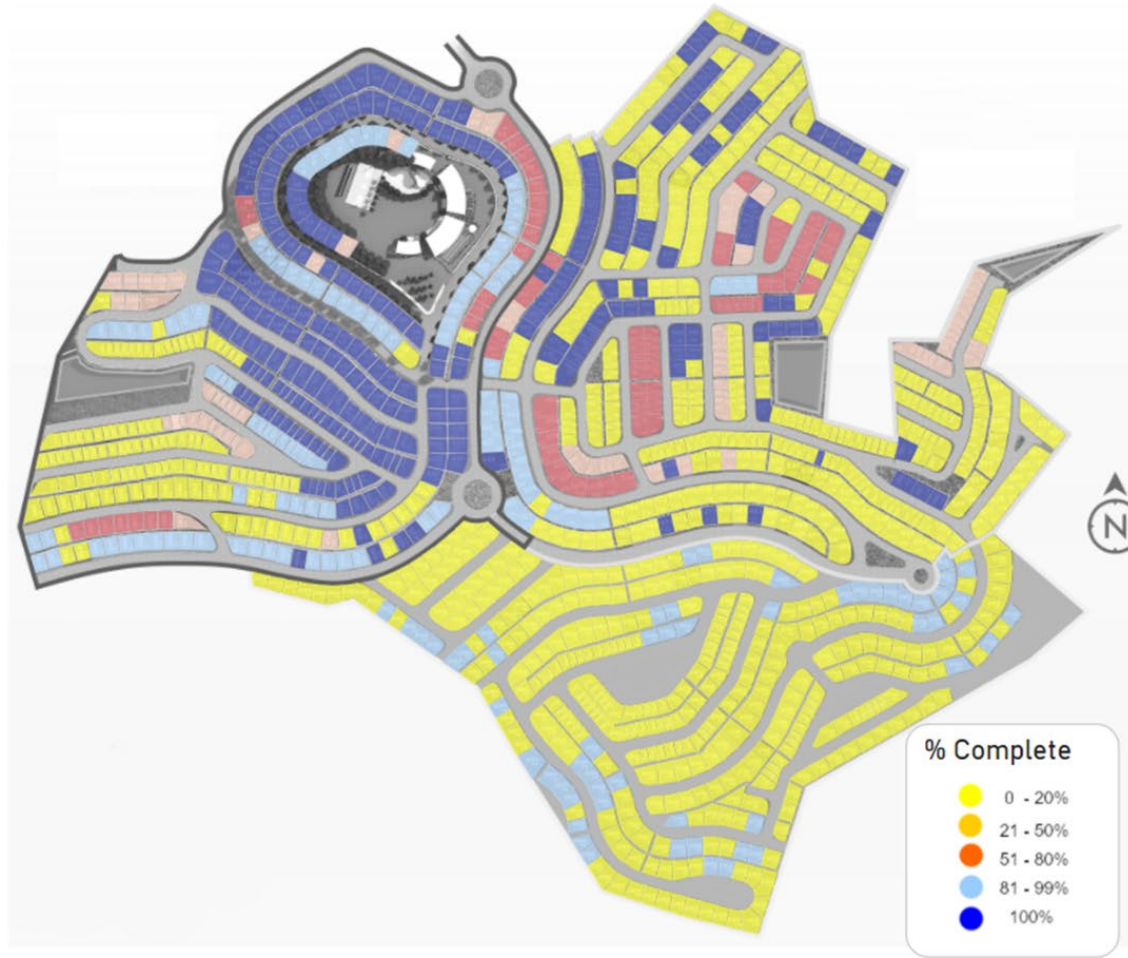
% Complete

- ☐ 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