

# Transforming How You Manage Projects with PM Compass

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## Agenda

- What is PM Compass?
- How clients are transforming their project controls
- Lessons Learned
- PM Compass Demonstration
  - Typical business rhythm and workflows
  - Change Management demonstration
- Group Discussion



## Deltek PM Compass

Centralized project control center.

*PM Compass helps you stay focused on project success with a single command center for all project information.*



### DIFFERENTIATORS

- **Centralized Command Center.** All information across all projects in a single place.
- **Defined business cadence.** Standardized timing and processes across all projects and portfolios.
- **Single version of the truth.** Everyone working from the same page.
- **Personalized reports.** Exact information you need, when you need it.

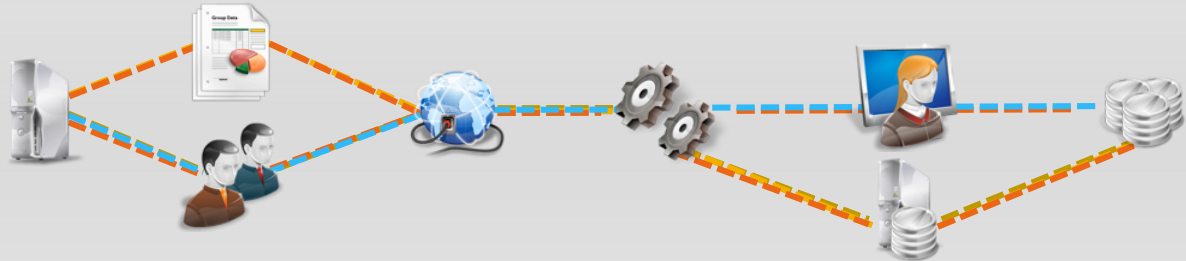
# Clarity Versus Chaos

## PM COMPASS

Program  
Visibility and  
Control



Business  
Process  
Management

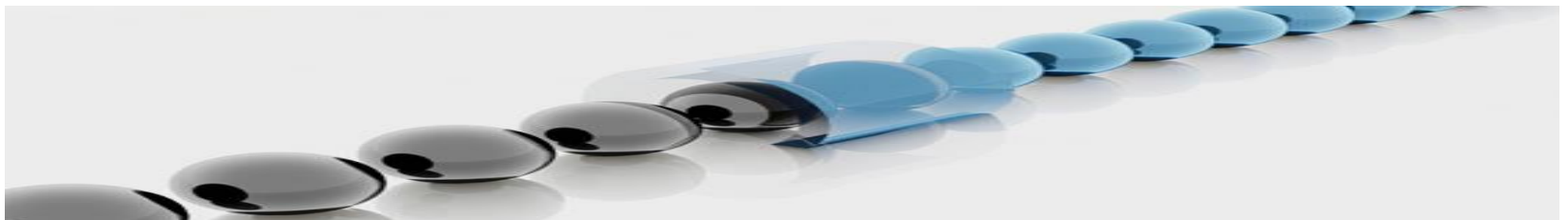


Systems

Analytics	ERP	Schedule	Time	Cost	Risk
WSA/Acumen Fuse	SAP	MSP/OP & Acumen Fuse	Time & Expense	Cobra	Acumen Risk

# Transforming Your Business

- From
  - Vertical Siloed Project Management
  - Paper Signatures
  - Reactive Change Control
  - Capturing progress in spreadsheets
  - Email
  - Data Anomalies
  - Struggling to Keep Up
- To
  - Horizontal Integrated Project Management
  - Electronic Approvals
  - Proactive Change Mgmt
  - Entering and approving progress via a web portal
  - Workflow
  - Data Alerts
  - Ahead of the Curve





# Lessons Learned

- A Tale of Two Runners...



# Work Authorization

**Deltek PM Compass - Workflows (Initial Work Authorization) - v2.0**

Show Navigation Back Forward

**Initial Work Authorization**

Save New List View Refresh Start Workflow Delete Workflow Print Help

### Test Cycles Increased - WAD Updated

General Links Progress Related Workflows

ID: WA0000001444 Due Date: 5/20/2014  
 Title: Test Cycles Increased - WAD Updated Priority: Medium  
 Project: Sat\_B Satellite Components  
 Contract Number: NDELTEK00001 Satellite Components  
 Control Account: 10600.02.001.A2/10.10.1.1 COMPONENT BUILD

Baseline Start: 10/4/2012 Forecast Start: 12/10/2012 Change Number:  
 Baseline Finish: 4/30/2014 Forecast Finish: 4/29/2014

**Statement of Work** Review

Scope of work:

Updated: Need to initiate a budget change request because the number of test cycles has been increased by the customer. We want to change the project to add a new activity to test the gauges before they are installed

Component Build - Lorem ipsum dolor sit amet, consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est

**Budget Detail**

Resource	DIRECT	HOURS
C2 Software Engineer	9,408.00	160.00
CMMI Specialist	57,624.00	1,000.00
Data Architect	32,678.10	500.00
Desinger	27,165.60	400.00
Engineer - General	47,040.00	800.00
Engineer - General	105,000.00	2,000.00
<b>Σ</b>	<b>4,388,266.70</b>	<b>10,160.00</b>

URL Link: file:///C:/Compass/templates/template.xls

# Statusing and Forecasting

Deltek PM Compass - Enter Schedule Progress - v2.2

Show Navigation Back Forward Settings Help Log Off

Enter Schedule Progress Search

Save List View Submit Print Help

Battleship\_A — Period End Date: 2/28/2015

Schedule Progress Select Columns Select

Δ	Select	Schedule Project	Activity ID	Activity Description	Duration	Baseline Start	Baseline Finish	Actual Start	Actual Finish	Expected Finish	Physical % Complete	Progress Type
▶	<input checked="" type="checkbox"/>	Battleship	<a href="#">1.2.M.M.10</a>	Build Mission System	12m	5/3/2013	4/3/2014			9/17/2015		As Planned
	<input type="checkbox"/>	Battleship	<a href="#">1.2.P.102</a>	Build Propulsion Sub-	12m	5/3/2013	4/3/2014					As Planned

General Resources Relationships User Fields Notes Codes

Activity ID: 1.2.M.M.102 Description: Build Mission System Sub-Assemblies

Physical % Complete: 0.00 Status: Planned

Progress Type: As Planned Type: ASAP

Progress Value: 0 Duration: 12m

Expected Finish: 9/17/2015 Criticality: Most Critical

Dates

	Start	Finish
Actual		
Forecast	5/31/2013	5/1/2014
Baseline	5/3/2013	4/3/2014
Target		

Cost Links

Work Package: [10620.20.003/10.10.2.3/WP00480](#)

CAM: Jack Tinker

Ready



# Variance Analysis

Deltek PM Compass - Workflows (Explain Variance) - v2.2

Show Navigation Back Forward Settings Help Log Off

Explanation of Variance 2 of 19 Search

Save New List View Refresh Help

**Explanation of Variance: Battleship\_A - 10620.10.001/10.10.2.3 /KEY PLANS**

General Child Workflows Links Progress

ID: VAR000100489 Due Date: 4/12/2013

Title: Explanation of Variance: Battleship\_A- 10620.10.001/ Status Date: 6/30/2012

Project: Battleship\_A

Control Account: 10620.10.001/10.10.2.3

Cost Detail

	BCWS	BCWP	ACWP	SV	SV %	CV	CV
Current:	28,217.00	43,161.00	20,717.00	14,944.00	53	22,444.00	
Cumulative:	28,217.00	43,161.00	20,717.00	14,944.00	53	22,444.00	

	BAC	EAC	VAC	VAC %	TCPI to BAC	TCPI to EAC
At complete:	974,217.00	931,056.00	43,161.00	4	0.98	1.02

Variances that exceeded thresholds:  
 Schedule variance: Current percentage. Cumulative percentage.  
 Cost variance: Current percentage. Cumulative percentage.  
 Values calculated using: DIRECT, FRINGE, FUNDING, GANDA, LAB\_OH, MATL\_OH, OVERHEAD

Copy Narratives..

Explanation of Variance Review

Surprise, surprise, we are ahead of schedule!

Impact Review

Take Friday off

Corrective Action Review

Monthly Summary Review

Ready

# Robust Reporting

Deltek PM Compass - Dashboard - v2.2

Dashboard PCA Reports

Global Search Project **Battleship\_A** Control Account **Apply**

Project	Control Account	200d	190d	6/1/2012	2/21/2013	6/1/2012	6/1/2012	2/21/2013
1.1.1	Key Plans	C	200d	190d	6/1/2012	2/21/2013	6/1/2012	6/1/2012
1.1.4	2d Const Dwg Extraction (Units)	C	186d	186d	6/1/2012	2/15/2013	6/1/2012	2/15/2013
1.2	Manufacturing	C	945d	945d	6/1/2012	1/14/2016	6/1/2012	1/14/2016
1.2.H	Hull & Final Assembly	C	945d	945d	6/1/2012	1/14/2016	6/1/2012	1/14/2016
1.2.H.6	Compartment completion	C	260d	260d	6/1/2012	5/30/2013	6/1/2012	5/30/2013
1.2.H.A	Unit Assembly	C	225d	225d	5/2/2014	3/12/2015	5/2/2014	3/12/2015
1.2.H.A.101	Assemble Unit 101 wing unit	C	225d	225d	5/2/2014	3/12/2015	5/2/2014	3/12/2015
1.2.H.A.102	Assemble Unit 102 - inner bottom	C	225d	225d	5/2/2014	3/12/2015	5/2/2014	3/12/2015
1.2.H.A.103	Assemble Unit 103 - accommodations	C	225d	225d	5/2/2014	3/12/2015	5/2/2014	3/12/2015

CV and SV Chart

Control Account: 10620.10.001 / 10.10.2.3 KEY PLANS

Period	Scheduled	Performed	Actuals	CV	SV
06/30/2012				20	15
07/31/2012				-15	-35

CPI vs SPI Chart (PCA)

Control Account: 10620.10.001 / 10.10.2.3 KEY PLANS

Period	Scheduled	Performed	Actuals	CPI	SPI
07/31/2012				0.00	0.00
1.00				2.00	2.00

Variance Analysis (CAM Grouping)

Control Account: 10620.10.001 / 10.10.2.3 KEY PLANS

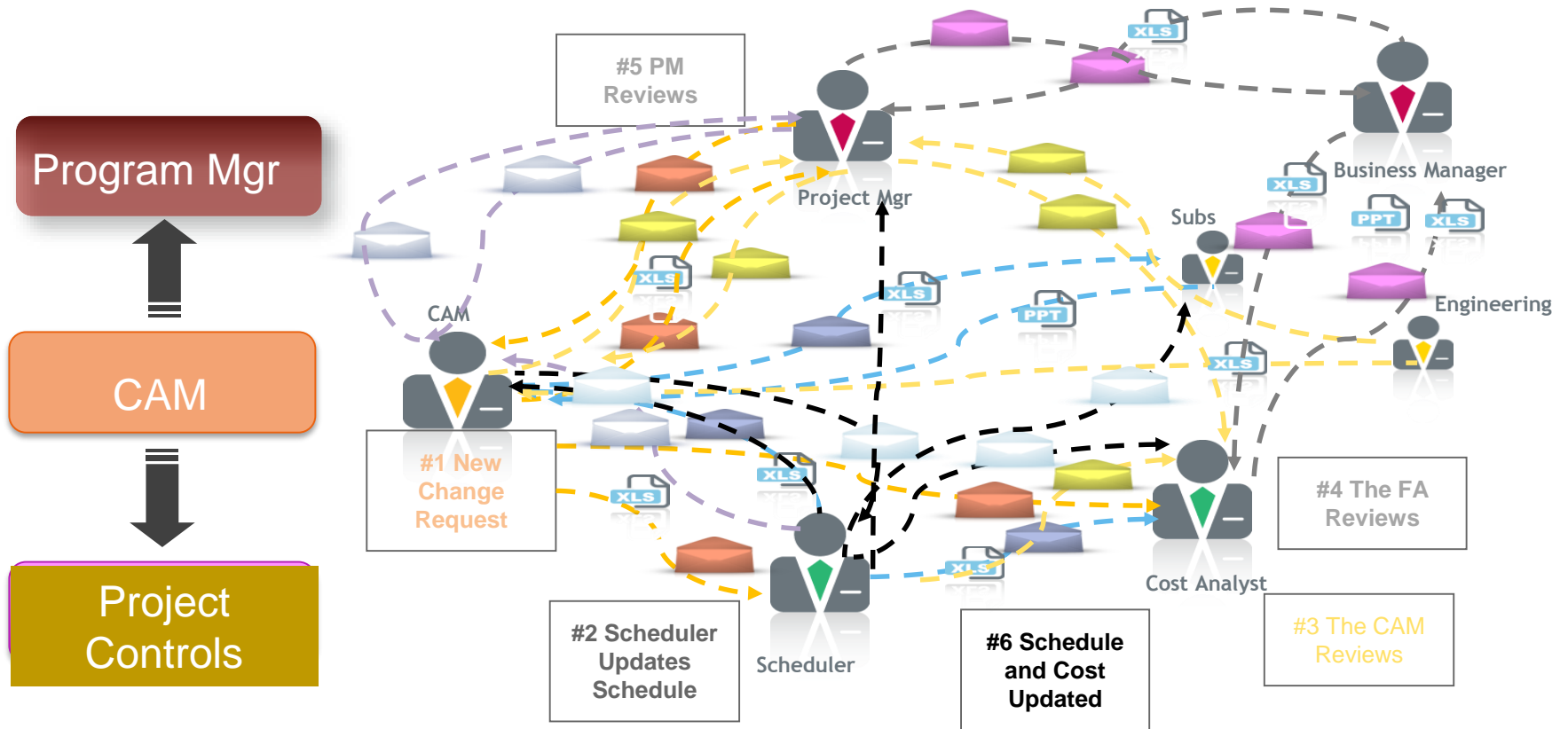
Variance Analysis Negative VAC

	Current Period % SV	Current Period % CV	Current Period SPI	Current Period CPI	Cum to Date % SV
Control Account Manager Name: Sam Red	(\$1.00)	\$0.00	\$0.00	\$0.00	(\$0.47)
<b>Final Totals</b>	(\$1.00)	\$0.00	\$0.00	\$0.00	(\$0.47)

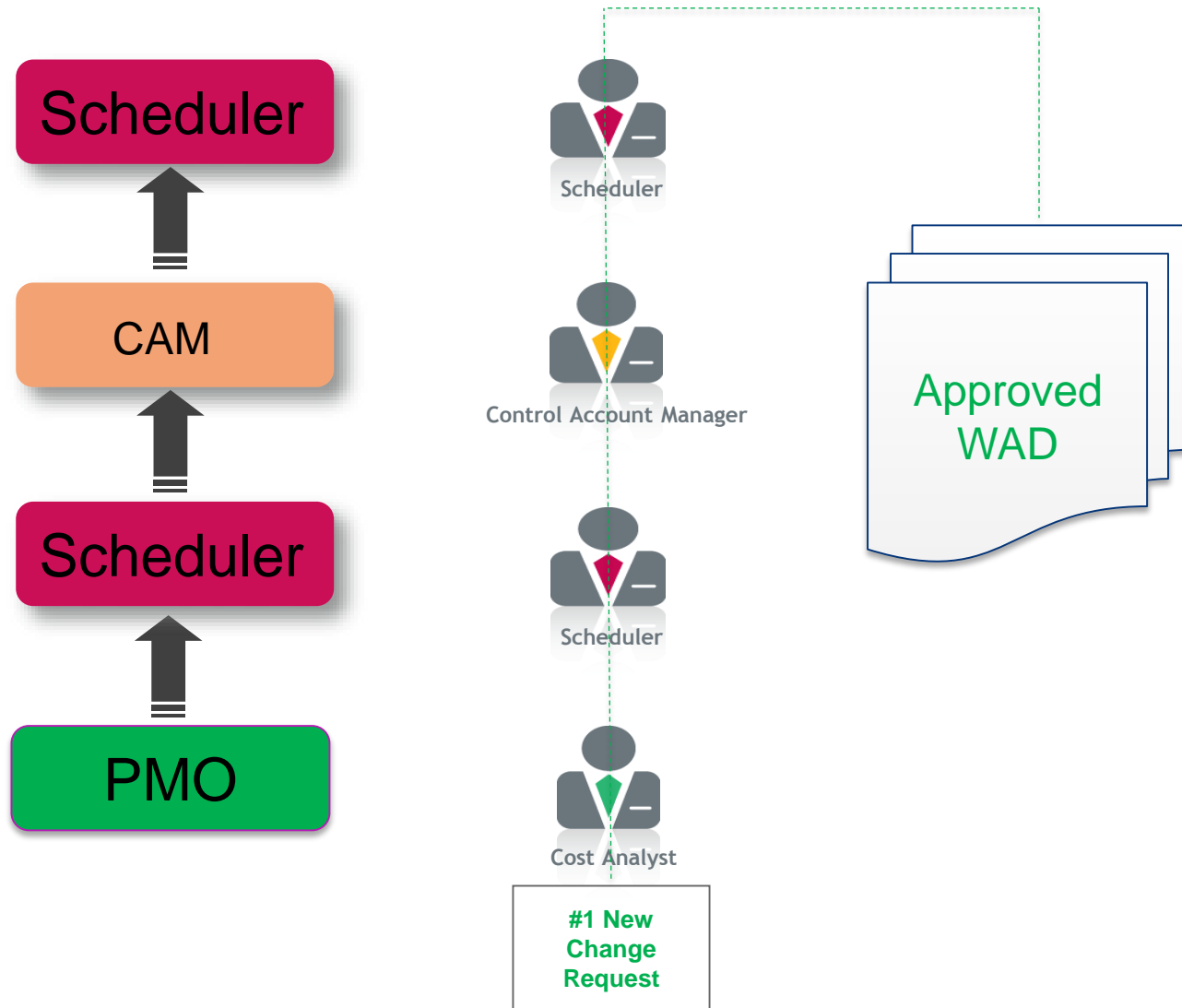
**Variance Analysis Negative VAC Percentage**  
**Thursday, September 17, 2015 9:48:36 AM**  
**Project: Battleship\_A - Navy Patrol Boat**  
**Report Options**

Ready

# Manual Change 'Control'



# Automated Change Management



# Change Management

Deitek PM Compass - Workflows (Budget Change Request) - v2.2

Budget Change Request - My Assignments

Save New List View Refresh Print Help

### Schedule Change

General Child Workflows Related Workflows Links Progress Advanced

ID: CHG0000001757 Change Number: BCR0000255 Due Date: 6/23/2014  
 Title: Schedule Change Created: 5/29/2014 Priority: Medium  
 Project: Battleship\_A Navy Patrol Boat  
 Control Account: 10620.10.001/10.10.2.3 KEY PLANS

Proposed Change

Click Change Details to enter schedule data and other details associated with the change

Budget Details

Resource	HOURS	DIRECT	Total Costs
Engineer - General	2,000.00	113,306.66	197,040.28
Engineer - General	3,000.00	229,950.00	399,883.05
Engineer - Structural	550.00	35,200.00	61,212.80
Photocopying	0.00	10,000.00	10,150.00
Project Manager	3,500.00	164,250.00	285,630.75
Subs Labor	0.00	12,000.00	12,180.00
<b>Σ</b>	<b>9,050.00</b>	<b>572,706.66</b>	<b>974,216.88</b>

Cost

	Current	Requested	Total
Current	974,216.88		
Requested		0.00	
Total	974,216.88		

Dates

	Start	Baseline	Finish
Current	6/1/2012		5/30/2013
Requested			

Justification

Ready

Deitek PM Compass - Change Details - Change Number: BCR0000255

Change Details - Change Number: BCR0000255

Battleship\_A Status Date: 7/31/2012 Item: CHG0000001757 - Schedule Change

Save Item View View Summary Print Help

WBS	OBS	WP	Activity ID	Description	EVT	Forecast Start
Predecessor						6/1/2012
10620.10.001	10.10.2.3			KEY PLANS		6/1/2012
10620.10.001	10.10.2.3	WP00010	1.1.1.1	Develop Hull Sys	Percent Complete	6/1/2012
10620.10.001	10.10.2.3	WP00010		Develop Hull Sys		6/1/2012
10620.10.001	10.10.2.3	WP00020		Develop Propuls	Percent Complete	6/1/2012
10620.10.001	10.10.2.3	WP00030		Develop Mission	Percent Complete	11/2/2011
Successor						6/1/2012

Change Details

General Relationships Resources Costs Milestones/Steps Advanced Codes Notes Links

Work Package/Activity ID: 10620.10.001/10.10.2.3/WP00010/1.1.1.1 Description: Develop Hull Systems Status: Complete

Duration: 3m Control Account Manager: Sam Red

Dates

	Current	Requested
Forecast Start	6/1/2012	6/1/2012
Forecast Finish	6/1/2012	6/1/2012
Baseline Start	6/1/2012	
Baseline Finish	8/23/2012	

Ready

## Contact

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