

Appendix L: Quarterly Management Review Checklist

The following checklist is to be used by *Supervisors* and *Project Managers* when preparing for the *Quarterly Management Review* meetings. Refer to the appropriate section of the *Project Management Handbook* for analysis details. The *Clarity* reports should be used to obtain the necessary information; however, changes must be made in *Open Workbench*. This checklist should be completed one week prior to the scheduled *Quarterly Review*. Refer to [Section 10: Reporting and Portlets](#) and [Section 8: Weekly Analysis](#) for detailed information regarding these reports.

Done (✓)	Step	Report, Review or Portlet Library and View	Section. Page #
	1	<p>Report: <i>Usage Analysis - Task Level Non-Project and Team Management</i> Library: <i>Weekly Analysis</i> Views: <i>Usage Analysis Gantt – Non-Project</i> <i>Usage Analysis Gantt – Team Management</i></p> <p>Validate all <i>Estimates</i> and <i>Start/End Dates</i>. Tasks in <i>Non-Project and Team Management Plans</i> are planned for a one-year period, with fixed and locked start and end dates. <i>Time off and Training</i> tasks may have either a <i>Fixed</i> or a <i>Uniform</i> load pattern. Usage on these tasks may not follow a steady usage pattern and should be reviewed carefully for modification. The <i>Administration</i> task typically has a <i>Uniform</i> load pattern and a fairly steady usage throughout the year. Validate the <i>Start</i> and <i>End Dates</i> of each task; should always be the first day and the last day of the plan year unless tasks were added for a new resource or resource was inactivated early. <i>Start</i> and <i>End Dates</i> should never extend beyond the plan year. Review the <i>Estimate to Complete (ETC)</i> and the bottom-line totals for overall variance.</p>	10.10
	2	<p>Report: <i>Usage Analysis Activity Level Customer Support and System Maintenance</i> Library: <i>Weekly Analysis</i> Views: <i>Usage Analysis Gantt – Customer Support</i> <i>Usage Analysis Gantt – System Maintenance</i></p> <p>Validate all <i>Estimates</i>, <i>Variance Percentages</i>, and <i>Start/End Dates</i>. Activities in <i>Customer Support and System Maintenance Plans</i> are planned for a one-year period, with fixed, locked, uniform loaded estimates. It is assumed that all activities will have a fairly steady usage throughout the year. Any estimate that deviates greatly from this steady usage should be reviewed for modification. Pay close attention to tasks with high total usage; inaccurate estimates will have a greater impact on resource utilization. Refer to Resource Utilization in <i>Step 5</i>.</p>	10.10

Done (✓)	Step	Report, Review or Portlet Library and View	Section. Page #
		<p>Validate the <i>Start</i> and <i>End Dates</i> of each activity; should always be the first day and the last day of the plan year, unless an activity was added after the initial plan was created (probably won't have a baseline) or shut down early (probably shows 100% complete). <i>Start</i> and <i>End Dates</i> should never extend beyond the plan year.</p> <p>Review the bottom-line totals and the overall <i>Variance Percentage</i>. This becomes increasingly important the further along in the two-year <i>Master Plan</i>. If <i>Support and Maintenance</i> will greatly exceed the <i>Allocation</i>, the <i>Division Manager</i> may want to consider using <i>Contingency Reserves</i>.</p> <p>Run the report <i>Support & Maintenance by Team</i> to review summary information by team and division.</p>	
	3	<p>Report: <i>Usage Analysis Activity Level Planned Maintenance and Upgrades</i> Library: <i>Weekly Analysis</i> View: <i>Usage Analysis Gantt – Planned Maintenance</i></p> <p>Validate all <i>Estimates</i>, <i>Variance Percentages</i>, and <i>Start/End Dates</i>. All <i>Activities</i> in the <i>Planned Maintenance and Upgrade Plans</i> are planned for a two-year period with mostly variable loaded estimates. <i>Activities</i> that have a variance of +/- 20% must have a <i>Variance Explanation</i>. Validate that the explanation has been entered and that it still reflects the current status of the project. Negative variance means more time was spent than planned, positive means less time was spent. Be sure the <i>Variance Explanation</i> is "<i>politically correct</i>" and meaningful to the customer.</p> <p>Validate the <i>Start</i> and <i>End Dates</i> of each task. Review for modification non-started activities with an <i>End Date</i> in the past. The <i>End Date</i> must be changed to a date in the future or the activity/task should be completed.</p> <p>Review the <i>ETC</i> and the bottom-line totals for overall variance. This is important the further we move into the two-year <i>Master Plan</i>. If <i>Planned Maintenance and Upgrades</i> exceed the <i>Allocation</i>, the <i>Division Manager</i> may want to consider using <i>Contingency Reserves</i>.</p> <p>Run <i>Planned Maintenance by Team</i> report to review detailed planned maintenance projects by team and division.</p>	10.10

Done (✓)	Step	Report, Review or Portlet Library and View	Section. Page #
	4	<p>Report: <i>Master Plan Activity</i> Library: <i>Weekly Tracking</i> View: <i>Variance Explanation Detail Plan</i> Note: <i>Detail Plans and Budget Plans only</i></p> <p>Validate % Complete, Original Estimate, Expended Hours, ETC, Revised Total Estimate, Variance % and Start/End Dates for all projects, including Enhancement Budgets.</p> <p>Verify that all projects with +/- 20% variance have a <i>Variance Explanation</i>, and that it is meaningful to the customer. Refer to Variance Explanation guidelines in <i>Step 3</i>, for more information.</p> <p>Verify that all Enhancement and Program Development Budgets are in balance (should have a zero Variance %).</p> <p>Review any projects with an <i>ETC</i> of zero that are not identified as <i>Complete</i>.</p> <p>Identify any projects that will exceed allocation and determine recommendation for review with the <i>Manager</i>. Add <i>Actuals</i> (in dated column) and <i>ETC</i> to compare to the allocation. Do not use the <i>Revised Total Estimate</i> because the project may have started prior to this <i>Master Plan</i>, in which case those hours are not included in the allocation.</p>	10.5
	5	<p>Report: <i>Resource Utilization Summary</i> Library: <i>Weekly Analysis</i> View: <i>Resource Load (All Resources)</i></p> <p>Review any resources that are overcommitted (in excess of 10 hours per month) or under-utilized consistently. Department recommendation is to reassign tasks from resources that are over-committed to resources that have availability where possible.</p>	10.8
	6	<p>Portlet: <i>Resource Management – Resource Planning – Unfilled Roles</i> Portlet: <i>Resource Management – Resource Planning – Role Demand</i></p> <p>Select your team in the <i>Resource OBS</i> filter.</p> <p><i>Generic Roles</i> are typically assigned to <i>Customer Support</i> and <i>Systems Maintenance</i> activities when there is a vacancy. Review plans to ensure resource assignments on <i>Generic Roles</i> are appropriate.</p> <p><i>Generic Roles</i> are also used for <i>Sizing Estimate</i> projects. If there are resources on the team that have availability and a <i>Sizing Estimate</i> project is scheduled to begin shortly, <i>Project Management Office (PMO)</i> recommends assigning resources, not <i>Generic Roles</i>.</p>	10.28
	7	<p>Portlet: <i>Executive Reporting – Project Variance - Unbaselined Projects</i></p> <p>This <i>Portlet</i> shows <i>Actuals</i> tracked on projects that have not been baselined.</p> <p>Projects on this report should be reviewed with the <i>Manager</i> and an approval plan determined.</p>	10.16

Done (✓)	Step	Report, Review or Portlet Library and View	Section. Page #
	8	Portlet: <i>Executive Reporting – Project Validation – Invalid LG Codes</i> Library: <i>Weekly Tracking</i> View: <i>Add Tasks</i> Note: <i>Team Plans</i> only. Refer to Appendix L: Customer Codes for more information. This <i>Portlet</i> shows invalid <i>Leadership Group Codes</i> on activities. Correct <i>Activity ID's</i> (3-4 position) for accurate reporting.	10.19
	9	Portlet: <i>Executive Reporting – Project Allocation – Program Allocation</i> This portlet shows summarized information comparing a program's <i>Total Usage</i> within a <i>Master Plan</i> period to that project's <i>Master Plan Allocation</i> . A drill-down shows the detail for each project in the program. Most programs on this portlet have a project called "xxx <i>Program Remaining ETC.</i> " The <i>ETC</i> of this project should be adjusted so that the overall program shows little or no variance. The project should be <i>Autoscheduled</i> so that the project's <i>Start Date</i> is not in the past.	10.20