

# Centralized Project Tracking, Monitoring, and Reporting Tool



- Electric Utility with 110+ years in service
- 5,000+ employees
- 4 million+ customers

Business Need	Challenge	Solution & Results
<ul style="list-style-type: none"> <li>• Establish standard project tracking nomenclature across departments</li> <li>• Track project status in a standard format and from a centralized location</li> <li>• Automate status updates and notifications</li> <li>• Provide visibility into resource needs and problem areas</li> <li>• Incorporate project portfolio management best practices</li> <li>• Report from a standard data set for a single source of truth</li> <li>• Enable real-time access through smart devices (e.g., laptops, tablets, phones, etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• The team had managed a complex and broad mix of projects taking into account varied documentation needs, communications tactics, multi-level project management methodology, disparate systems, and multiple document locations</li> <li>• Difficulties included management transparency, transitioning work to others, overseeing and providing guidance on the quality of information, and standardizing reporting metrics</li> <li>• Third party tools require extensive setup and expensive licensing</li> <li>• Ramp up time for end-users needed to be short</li> </ul>	<ul style="list-style-type: none"> <li>• Implemented a centralized project tracking, monitoring, and reporting tool for the entire department that included project data at the project and portfolio levels</li> <li>• The implementation included a scalable and adaptable tool that uses a simple user interface brings transparency of data and continuously improves project tracking, reporting, and the overall efficiency to project management and implementation</li> <li>• The tool also provides leaders the ability to improve resource allocation and workflow management through the visibility to hours of work and percent of FTE allocated to any project</li> </ul>

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Projects

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Intake Number	Name	Type	Phase	Status	Implementation Date	Completion Date	Primary PM	Overall Health	Score	Rank	Impact By	Impact To	Archive
001-0001	Test Ramon	Affordability	Plan	Active	10/31/2019	11/30/2019	Ramon Gonzalez	<span style="color: green;">●</span>	20.4	2	BCD,CCC	BCD,RSO	<input type="checkbox"/>
test-02	test_name1			Active			Saranya Sivasdas	<span style="color: red;">●</span>					<input type="checkbox"/>
Streetlight Reconciliation Project	test_name	Foundational		Active			Saranya Sivasdas	<span style="color: green;">●</span>					<input type="checkbox"/>
10-010	Rule 24 Click-Through	Mandated	Plan	Active	10/04/2019	10/18/2019	Karen Taylor Herring	<span style="color: red;">●</span>	28.8	1		T&D	<input type="checkbox"/>
10-009	Streetlight Reconciliation Project	Foundational	Plan	Active	04/26/2019	05/03/2019	Ramon Gonzalez	<span style="color: yellow;">●</span>	18.4	3	CP&S,CS	BCD,CCC,CP&S	<input type="checkbox"/>
10-008	Residential Wiring Protection Plan	Foundational	Plan	Active			Ramon Gonzalez						<input type="checkbox"/>
10-007	NEM 2 Successor Tariff		Plan	Active		05/16/2019	Karen Taylor Herring	<span style="color: green;">✓</span>					<input type="checkbox"/>
10-006	Bill Redesign		Plan	Cancelled		04/26/2019	Ramon Gonzalez	<span style="color: yellow;">●</span>					<input type="checkbox"/>
10-005	Credit Card - Product Enhancements		Plan	Active			Mark Podorsky						<input type="checkbox"/>
10-004	Community Renewables	Strategic	Plan	Active			Ramon Gonzalez						<input type="checkbox"/>
10-003	Customer Letter Project		Plan	Active			Ramon Gonzalez	<span style="color: green;">●</span>					<input type="checkbox"/>
10-002	Energy Efficiency Advisor Tool Phase 2	Affordability	Plan	Active			Karen Taylor Herring						<input type="checkbox"/>
10-001	2015 GRC Phase II - Baseline Allocation Rebill	Operational	Plan	On Hold	08/30/2019		Ramon Gonzalez	<span style="color: green;">●</span>					<input type="checkbox"/>

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