

PROJECT WIDGETS

Where There's a Widget, There's a Way!
Overcoming Real Life Project Management Challenges

August 23, 2023

Microsoft
Partner



Gold Project and Portfolio Management

About Project Widgets

Who We Are:

- Microsoft Project Gold Partner and Solution Provider
- Over 25 years experience in delivering Microsoft Project services and products
- Published authors
- Multi-industry focus



Our Services:

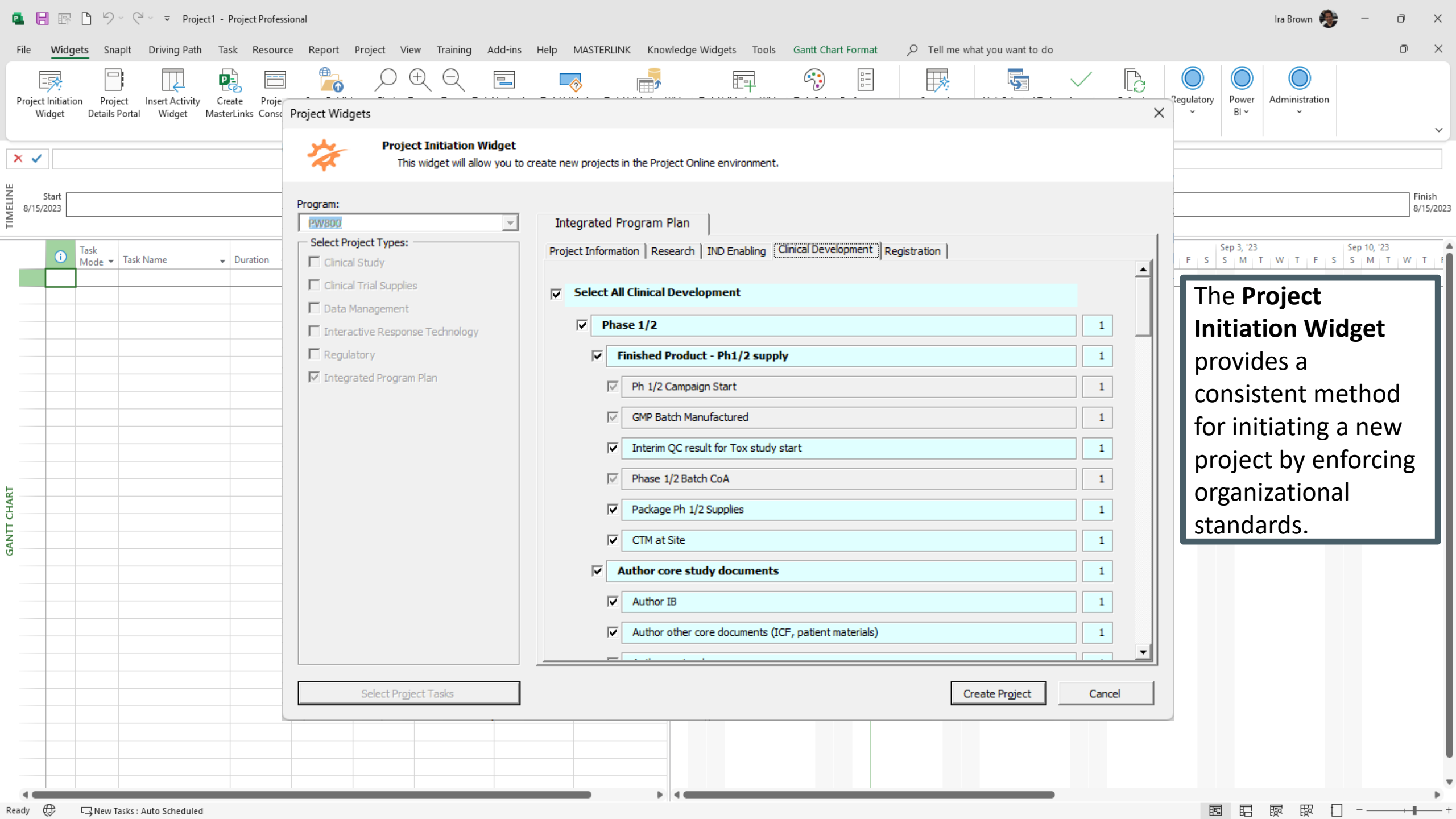
- Microsoft Project Implementations, Consulting and Training
- Custom Solutions for Microsoft Project
- Add-On Products
- Mentoring and Support

Agenda

- Project Initiation Widget
- Insert Activity Widget
- Project Details Portal
- Task Validation Widget
- Scenario Builder Widget
- SnapIt!

Project Initiation Widget

- The **Project Initiation Widget** provides a consistent method for initiating a new project
- Leverages existing project templates
- Enforces standard project naming conventions
- Allows a user to enter *metadata* for a project
- You can specify which activities are *mandatory* or *optional*, as well as enter the *quantity* of a given activity
- You can create an **entire set of projects** for a program at one time!
- Integrated with MasterLink to *automatically* create links to related tasks and milestones in functional plans and program plans.



Project Initiation Widget
This widget will allow you to create new projects in the Project Online environment.

Program:

Select Project Types:

- Clinical Study
- Clinical Trial Supplies
- Data Management
- Interactive Response Technology
- Regulatory
- Integrated Program Plan

Integrated Program Plan

Project Information | Research | IND Enabling | **Clinical Development** | Registration

- Select All Clinical Development**
- Phase 1/2**
- Finished Product - Ph1/2 supply**
- Ph 1/2 Campaign Start
- GMP Batch Manufactured
- Interim QC result for Tox study start
- Phase 1/2 Batch CoA
- Package Ph 1/2 Supplies
- CTM at Site
- Author core study documents**
- Author IB
- Author other core documents (ICF, patient materials)

Select Project Tasks

Create Project Cancel

The Project Initiation Widget provides a consistent method for initiating a new project by enforcing organizational standards.

TIMELINE

GANTT CHART

Insert Activity Widget

- The **Insert Activity Widget** provides a consistent method for adding new activities to a project
- Leverages existing project templates to recommend the appropriate tasks to add
- Ensures all new tasks are associated with the proper task field information to support enterprise reporting requirements

Project Initiation Widget | Project Details Portal | Insert Activity Widget | Create MasterLinks | Project Console | Save, Publish, and Close Project | Find Widget | Task Navigation Widget | Task Validation Widget | Scenario Builder Widget | Regulatory Wave Widget | Regulatory Set Document Dates in Wave | Resource Role Widget | Power BI Portfolio Dashboard | Power BI Project Information | Power BI Projects by Country | Set Widgets Application Version | Bulk Update Projects | Assign Task Code To Template Task | Assign Multiple Task Codes To Template Tasks

READ-ONLY This project was opened in read-only mode. Check Out

	Update Requires	Mandatory	Give & Get	'Get' Link Status	Owner Date	Task Name
25					NA	Process Locked
26					NA	Tech transfer
27					NA	Analytical Development
28		●			NA	Analytics Locked & Tr
29					NA	GLP Toxicology & Biodis
30					NA	GLP Tox Study - Rode
31					NA	Method developm
32					NA	In life
33					NA	Tissue analysis
34					NA	Draft Unaudited Re
35					NA	Final GLP Tox Repo
36					NA	GLP Tox Study - Non F
42		●			NA	Tox & biodistribution
43					NA	Clinical Development
44					NA	Phase 1/2
45					NA	Finished Product - Ph
46		●			NA	Ph 1/2 Campaign St
47		●			NA	GMP Batch Manufa
48					NA	Interim QC result f
49		●			NA	Phase 1/2 Batch Co
50					NA	Package Ph 1/2 Sup
51					NA	CTM at Site
52					NA	Author core study do
53					NA	Author IB
54					NA	Author other core e
55					NA	Author protocol
56					NA	Regulatory and EC sul
57					NA	Protocol regulatory approva
58					NA	IRB Review
59					NA	Phase 1/2 Study 1
60					NA	First Site Initiated
61		●			NA	First Patient In

Insert Activity Widget

This function allows you to insert template activities into your project

Type of Template: **Integrated Program Plan** | Copies to Insert: **1**

Level 1 Task: **IND Enabling**

Level 2 Task: **GLP Toxicology & Biodistribution Studies**

Level 3 Task: **GLP Tox Study - Non Rodent**

Level 4 Task:

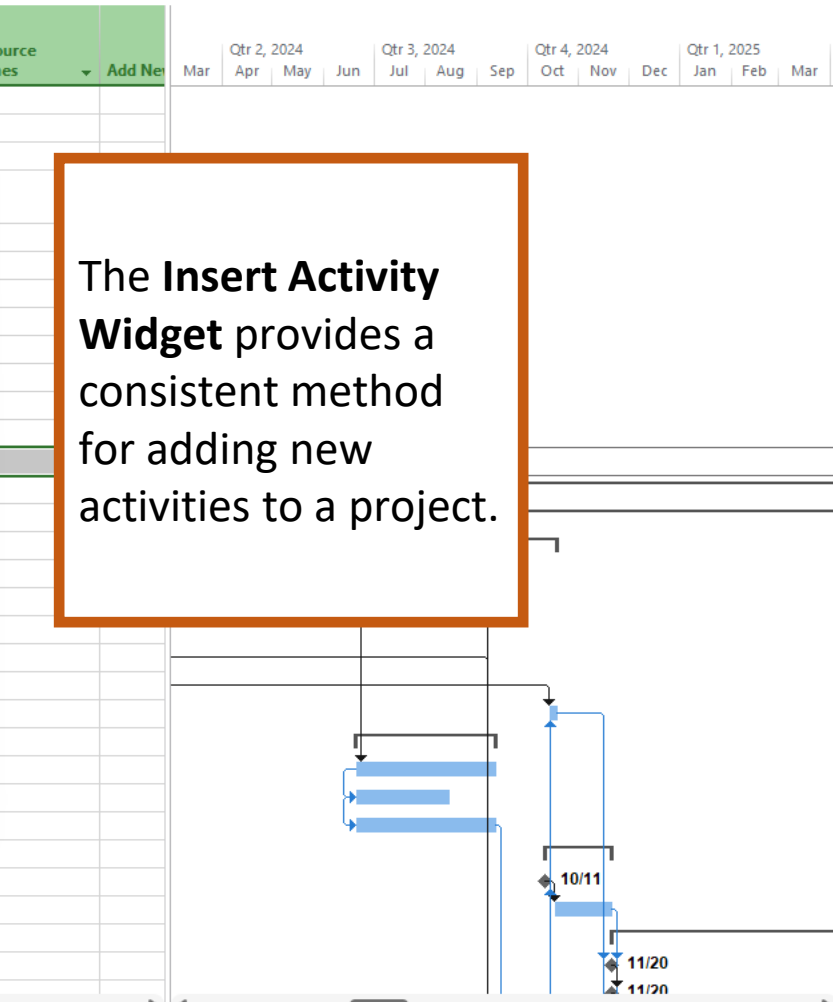
Level 4 Tasks/Milestones:

- Method development
- In life
- Tissue analysis
- Draft Unaudited Report
- Final GLP Tox Report - Non Rodent

Select/Deselect All Include summary task for selected tasks/milestones

Insert Cancel

The **Insert Activity Widget** provides a consistent method for adding new activities to a project.



Project Details Portal

- Provides **modern, intuitive user interface** for capturing key project information in a centralized portal.
 - Project Metadata
 - Key Contacts
 - Assumptions
 - Project Status
 - Risks
 - Issues
 - Actions
- **Configuration driven** to easily add/remove tabs and fields

BROWSE PROJECT PAGE
Edit Save Close Project Site Build Team Documents Risks Issues Project Permissions Deliverables Resource Plan Previous Next
Project Navigate Page

The **Project Details Portal** includes configurable tabs to collect key information regarding your project.

PW-800_Clinical Study_01 Timeline
Schedule
Project Details
Knowledge Widgets
Project Details Portal
Project Site
Projects
Approvals
Tasks
Timesheet
Resources
Strategy
Driver Library
Driver Prioritization
Portfolio Analyses

Status: Checked-in Last Modified: 7/23/2020 10:53 AM

We can configure the fields on the metadata page to meet your requirements.

Project Metadata	Key Contacts	Assumptions	Schedule Issues/Concerns	Project Status	Issue Escalation to Management
Field Name	Value				
Project Name	PW-800_Clinical Study_01 Timeline				
Project #	<input type="text"/>				
CTMS Study #	<input type="text"/>				
Protocol #	<input type="text"/>				
Short Protocol Description	<input type="text"/>				
	B I U [List Icon] [List Icon]				
Study Primary Objective(s)	<input type="text"/>				

Save

- PW-800_Clinical Study_01 Timeline
- Schedule
- Project Details
- Knowledge Widgets
- Project Details Portal**
- Project Site
- Projects
- Approvals
- Tasks
- Timesheet
- Resources
- Strategy
 - Driver Library
 - Driver Prioritization
 - Portfolio Analyses

Status: Checked-in Last Modified: 7/23/2020 10:53 AM

The fields included on the Key Contacts page can be configured according to your requirements.

Save

Project Metadata	Key Contacts	Assumptions	Schedule Issues/Concerns	Project Status	Issue Escalation to Management
Field Name	Value				
Project Leader	Select and/or Type to Search				
Biostatistics Primary Contact	Select and/or Type to Search				
Outsourcing Primary Contact	Select and/or Type to Search				
Clinical Program Director Primary Contact	Select and/or Type to Search				
Pharmacology Primary Contact	Select and/or Type to Search				
Clinical Quality Control & Compliance (CQCC) Primary Contact	Select and/or Type to Search				
Regulatory Primary Contact	Select and/or Type to Search				

PW-800_Clinical Study_01 Timeline
Schedule
Project Details
Knowledge Widgets
Project Details Portal
Project Site

Status: Checked-in Last Modified: 7/23/2020 10:53 AM

The fields included on the Assumptions page can be configured according to your requirements.

- Project Metadata
- Key Contacts
- Assumptions
- Schedule Issues/Concerns
- Project Status
- Issue Escalation to Management

Field Name	Value
Number of Countries	<input type="text"/>
Countries	<input type="text" value="x"/>
Countries Comment	<p>B <i>I</i> <u>U</u> [List Icon] [List Icon]</p> <input type="text"/>

Sites

Task Validation Widget

- The **Task Validation Widget** is used to inspect the quality of the data in a project.
- Organizations can define the types of **validation rules** they want to perform, and the Task Validation Widget will *search the project* and identify instances where these criteria are met.
- The **Task Validation Widget** provides a *summary* of the conditions found and provides *guidance* for how to address specific conditions.

Project Initiation Widget | Project Details Portal | Insert Activity Widget | Create MasterLinks | Project Console | Save, Publish, and Close Project | Find Widget | Task Navigation Widget | Task Validation Widget | Task Color Widget | Performance Widget | Scenario Builder Widget | Regulatory Wave Widget | Regulatory Set Document Dates in Wave | Resource Role Widget | Submission Name Widget | Power BI Portfolio Dashboard | Power BI Project Information | Power BI Projects by Country | Administration

READ-ONLY This project was opened in read-only mode. Check Out

Task not baselined

Task Validation Messages	Name
Task not baselined	Research
Missing predecessor; Task not baselined	Capsid selection
Missing predecessor; Task not baselined	Expression Cassette selection
Missing predecessor; Task not baselined	Therapeutic gene selection
Task not baselined	Construct optimized
Missing successor; Task not baselined	Model development
Task not baselined	Efficacy – 2D cell lines and prim
Task not baselined	Efficacy - 3D model
Task not baselined	In vitro PoC
Missing successor; Task not baselined	Animal model acquirement
Task not baselined	Vector production (small scale)
Task not baselined	Efficacy testing and reporting
Task not baselined	In vivo PoC
Name may be too long for reports, use SnapIt D	Lead candidate selected
Task not baselined	IND Enabling
Task not baselined	Dose Finding and Biodistributio
Missing successor; Task not baselined	Vector production (large scal
Task not baselined	In life
Task not baselined	Tissue analysis
Task not baselined	Draft report
Task not baselined	Final Report
Task not baselined	Efficacy & dose range demon
Task not baselined	Process Development
As this task is tagged for a milestone report, shc	Process Development
Task not baselined	Process Locked
As this task is tagged for a milestone report, shc	Tech transfer
Task not baselined	Analytical Development
Display name may be too long for reports; Missi	Analytics Locked & Transferred to QC
Task not baselined	GLP Toxicology & Biodistribution Studies
Task not baselined	GLP Tox Study - Rodent
Missing successor; Task not baselined	Method development
Task not baselined	In life
Task not baselined	Tissue analysis
Task not baselined	Draft Unaudited Report

Project Widgets

Task Validation Widget - Summary

This is a list of the Task Validation messages in your project

Task Validation Message:	Count
Name may be too long for reports, use SnapIt Display Name	8
Missing predecessor	4
As this task is tagged for a milestone report, should have a duration of 0 days	4
Missing successor	31
Scheduled within 60d of another milestone	21
Display name may be too long for reports	1

Task Validation Message Details:

All tasks in your project should have a predecessor in order to properly determine the critical path. Enter a predecessor for each task in your project.

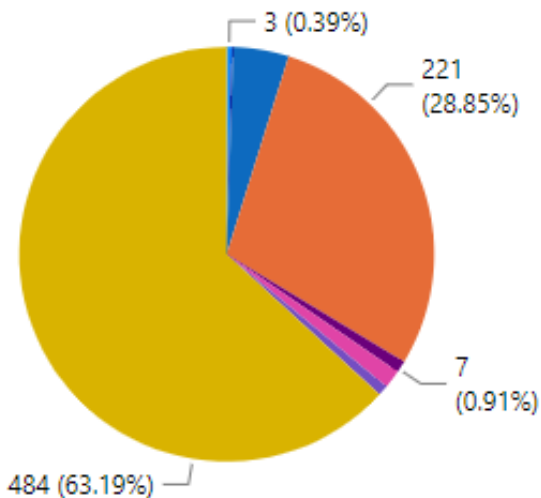
Manage Rules... Apply Filter Close

The **Task Validation Widget** provides a *summary* of the conditions found and provides *guidance* for how to address specific conditions

766

Validation Issue Count for the Current Selection

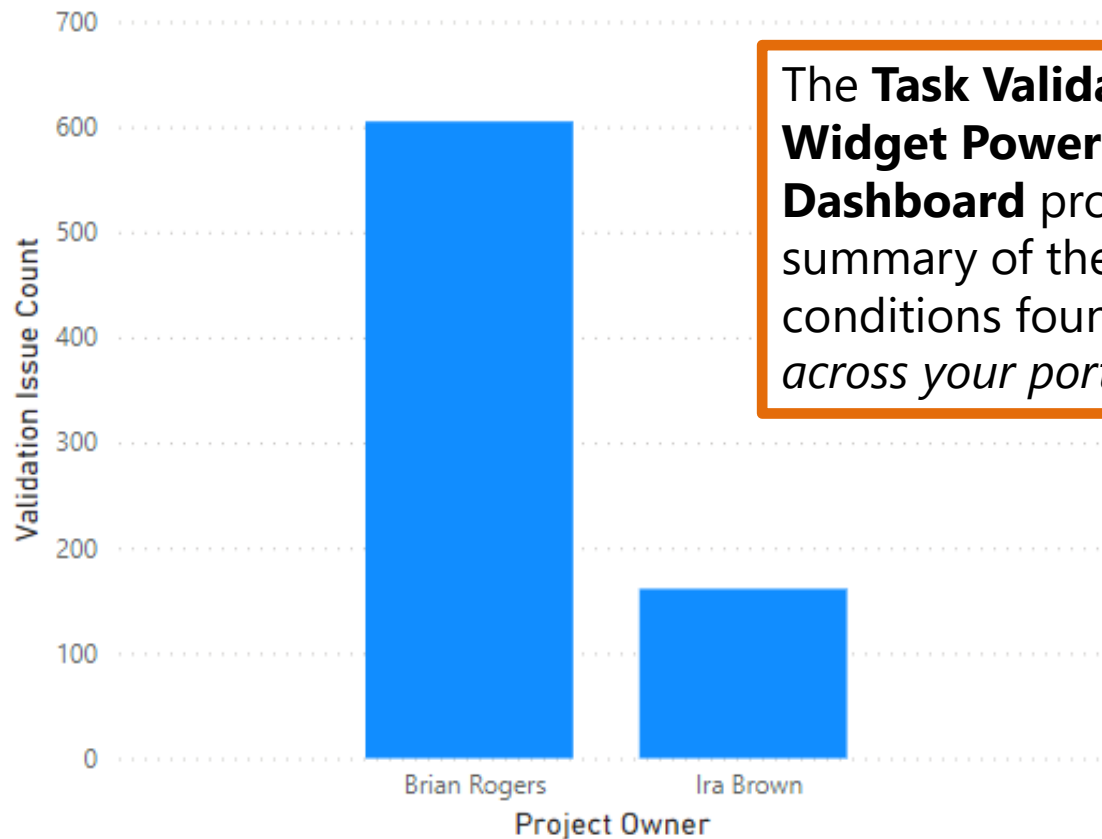
Validation Issue Count by Message



Message

- As this task is tagge...
- Display name may ...
- Missing predecessor
- Missing successor
- Scheduled within 6...
- Summary tasks sho...
- Summary tasks sho...
- Task not baselined

Validation Issue Count by Project Owner



The **Task Validation Widget Power BI Dashboard** provides a summary of the conditions found *across your portfolio.*

Filter By Project Name (Optional)

All

Scenario Builder Widget

- Create one or more **What If Scenario** versions of a project
- Seamlessly integrated with **OnePager Professional** to produce unlimited, configurable reports
- Includes a change report that highlights changes between a scenario and an active project, or between two scenarios.
- A scenario project can be **promoted** to become the active version of a project.

Project Initiation Widget | Insert Activity Widget | Insert Clinical Study Widget | Save, Publish, and Close Project Widget | Task Navigation Widget

Spectrum Design Project Initiation Widget | Administration | Spectrum Design

Scenario Builder Widget

This widget will allow you to create and compare scenario projects in Project Online

Create Scenario | Copy Scenario | Create OnePager | Scenario Change Report | Scenario Gantt Report | Promote Scenario

Scenario Builder Widget options:

Select project:

Scenario project name: Report display name:

Scenario description:

Options... OK Cancel

TIMELINE

Start 7/23/2020

Task Mode	Task Name	Duration	Start

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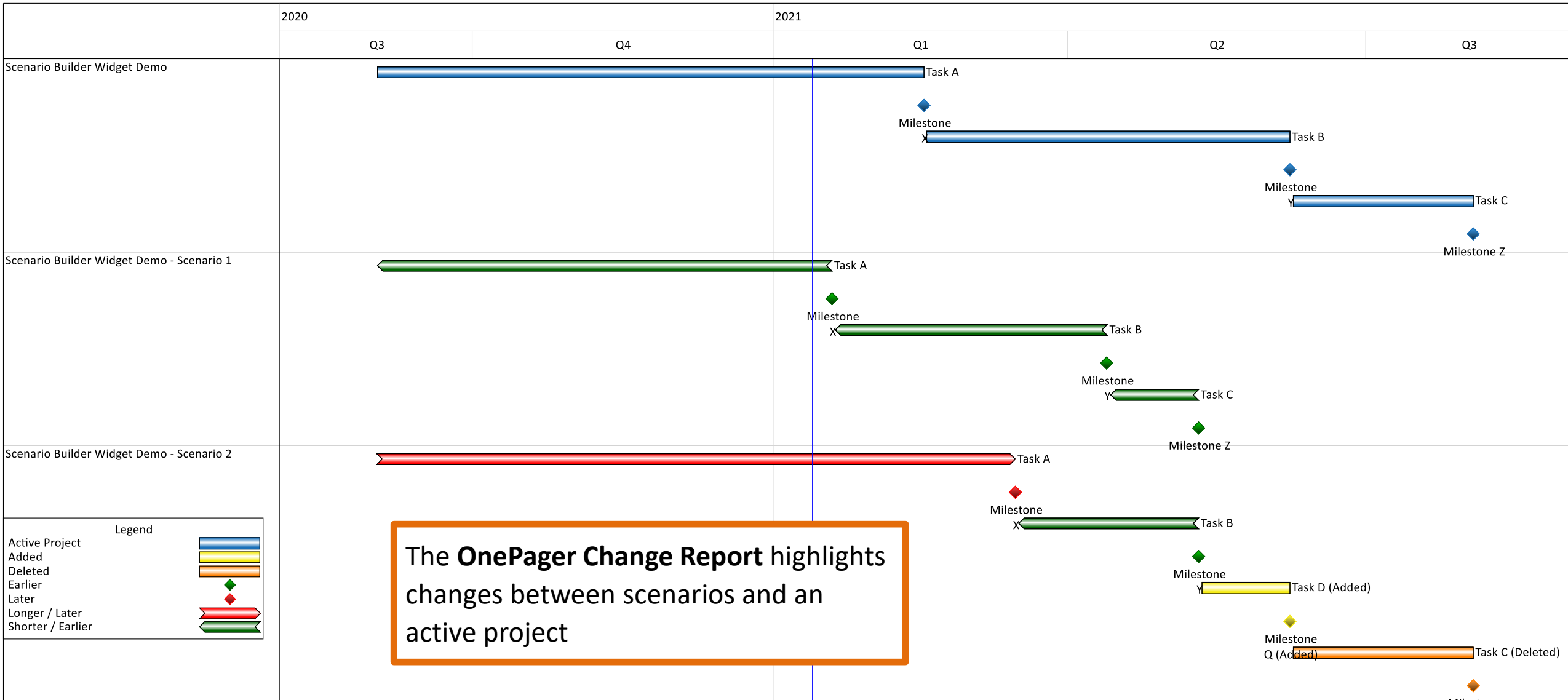
Finish 7/23/2020

Aug 2, '20 | Aug 9, '20 | Aug 16, '20

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	

The **Scenario Builder Widget** allows you to manage the process of creating "What if Scenarios" via its intuitive user interface

Scenario OnePager Change Report



The **OnePager Change Report** highlights changes between scenarios and an active project

Legend

- Active Project (Blue bar)
- Added (Yellow bar)
- Deleted (Orange bar)
- Earlier (Green diamond)
- Later (Red diamond)
- Longer / Later (Red arrow)
- Shorter / Earlier (Green arrow)

SnapIt!

- **SnapIt!** enables an organization to create **snapshots** of key project, task and milestone information in a centralized, easy to use application
- Snapshots include data from **Project Details Portal**
- Helps to *transform* the way an organization manages projects by **highlighting date changes** to key milestones from one period to another so that nothing will "slip through the cracks".
- SnapIt! is integrated with **OnePager Professional** to create *presentation quality reports*.

Create SnapIt! Report Finalize SnapIt! PowerPoint Report Create Project Snapshot Create Portfolio Snapshot Manage Snapshots Manage SnapIt! Snapshot Types SnapIt! Administration

TIMELINE Start Thu 6/23/22 Finish Thu 6/23/22

Task Mode	Task Name	Duration	Start

The **Create Project Snapshot** functionality allows you to capture a snapshot of key tasks and milestones for a project.

SnapIt!

Create Project Snapshot
This function will allow you to create a snapshot for the selected project

Select template type(s):

- Integrated Program Plan
- Interactive Response Technology
- Marketing Campaign
- MasterLink Template 1

Select project:
PW699 - Integrated Program Plan - 100

Select snapshot type:
Original Approved (Enterprise)

Snapshot prefix: 2023-Aug-15_PW699 - Integrated Program Plan - 100_O Snapshot suffix: Snapshot 'friendly' name for reports: AUGUST 2023
e.g., AUGUST 2023 or AUGUST 15,

Snapshot name:
2023-Aug-15_PW699 - Integrated Program Plan - 100_Original Approved

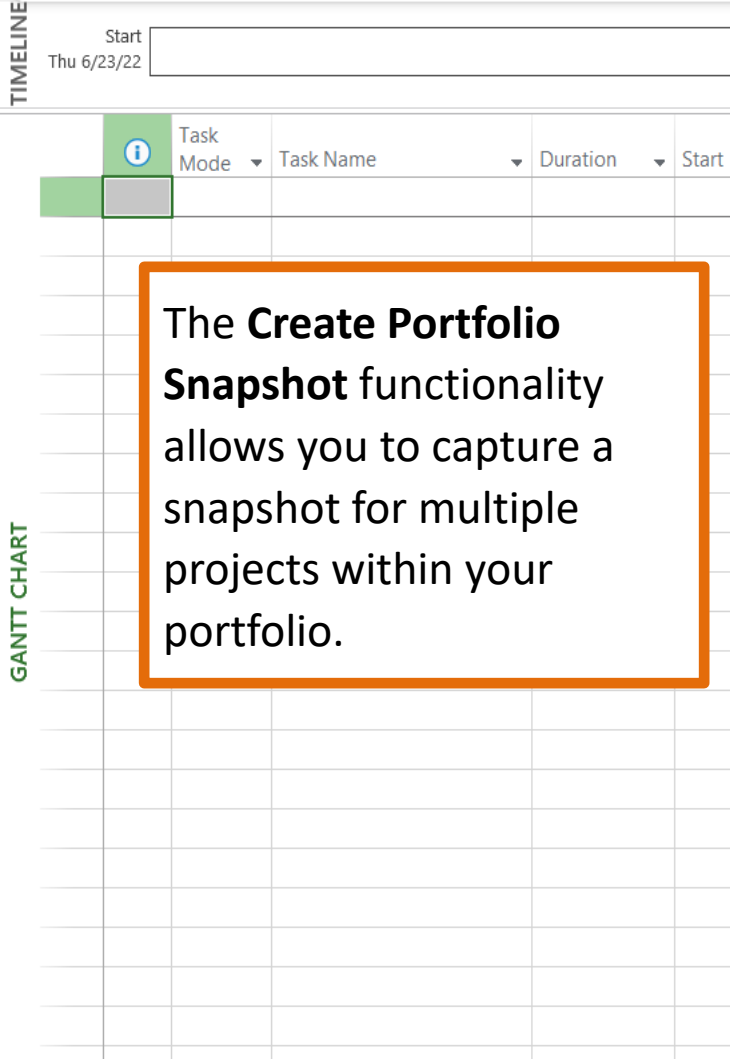
Comments:
Original approved snapshot.

Only include projects that you own

OK Cancel

GANTT CHART

Create SnapIt! Report Finalize SnapIt! PowerPoint Report Create Project Snapshot Create Portfolio Snapshot Manage Snapshots



The **Create Portfolio Snapshot** functionality allows you to capture a snapshot for multiple projects within your portfolio.

SnapIt!

Create Portfolio Snapshot
This function will allow you to create a snapshot for the selected projects

Select template type(s):

- Clinical Study
- Clinical Trial Supplies
- Data Management

Select projects that contain the following character(s):
[Text Field] [Apply] [Clear Selection]

Select projects:

- PW823-101 - Single Ascending Dose Study (SAD)
- PW823-102 - Multiple Ascending Dose (MAD)
- PW823-103 - Drug-Drug Interaction (DDI) Study
- PW823-104 - Renal Impairment
- PW823-201 - Proof of Concept Monotherapy

[Select/Deselect All]

Select snapshot type:
Monthly Portfolio (Enterprise)

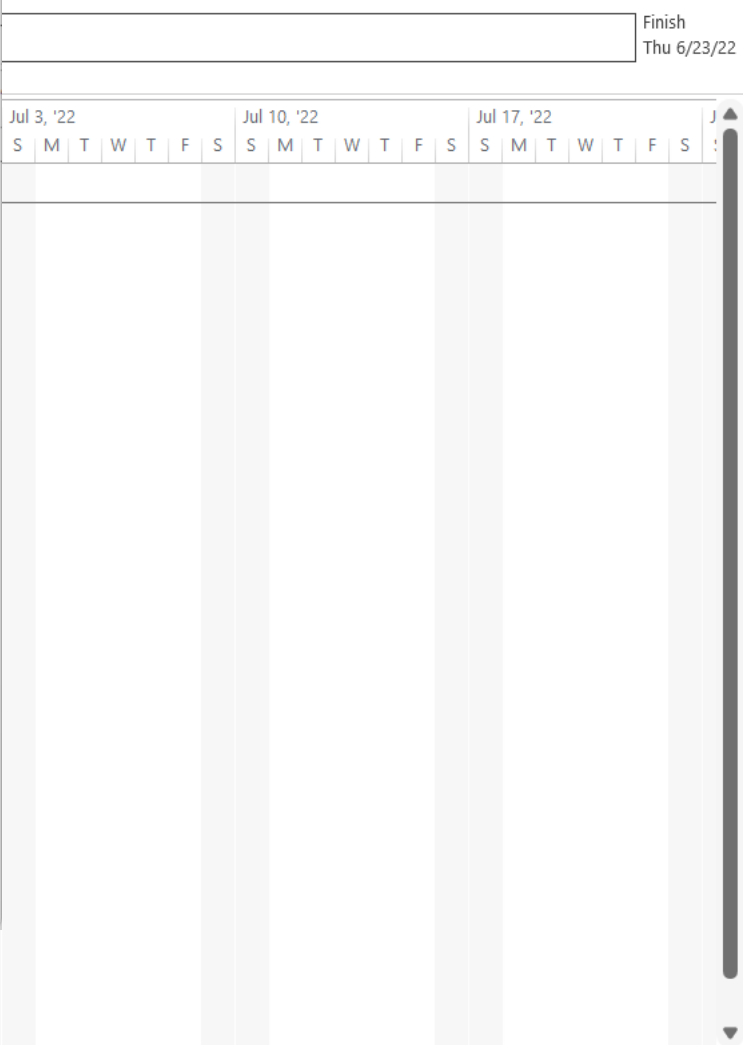
Snapshot name prefix: [2023-Aug-15_Monthly Portfolio] Snapshot name suffix: [] Snapshot 'friendly' name for reports: [AUGUST 2023]
e.g., AUGUST 2023 or AUGUST 15,

Snapshot name:
[2023-Aug-15_Monthly Portfolio]

Comments:
[Text Field]

Only include projects that you own

[OK] [Cancel]



Create Project Snapshot

Create Portfolio Snapshot

Create SnapIt! Report

SnapIt!

Create SnapIt! Report

This function will allow you to create a graphical report for the selected project

Select SnapIt! report: Report start date: Report finish date:

Select Current data:

Select Previous data:

Enter report subtitle: Select OnePager Pro mode:

Select filters:

Therapeutic Area: Program: Project Priority: Functional Owner:

Select projects:

	Current	Previous	Other
<input type="checkbox"/> PW801	✓	✓	NA
<input type="checkbox"/> PW802	✓	✓	NA
<input type="checkbox"/> PW803	✓	✓	NA
<input type="checkbox"/> PW804	✓	✓	NA
<input type="checkbox"/> PW805	✓	✓	NA
<input type="checkbox"/> PW806	✓	✓	NA
<input type="checkbox"/> PW807	✓	✓	NA

Only include projects that you own 0 of 12 projects selected

Export OnePager to PowerPoint Keep reporting project open

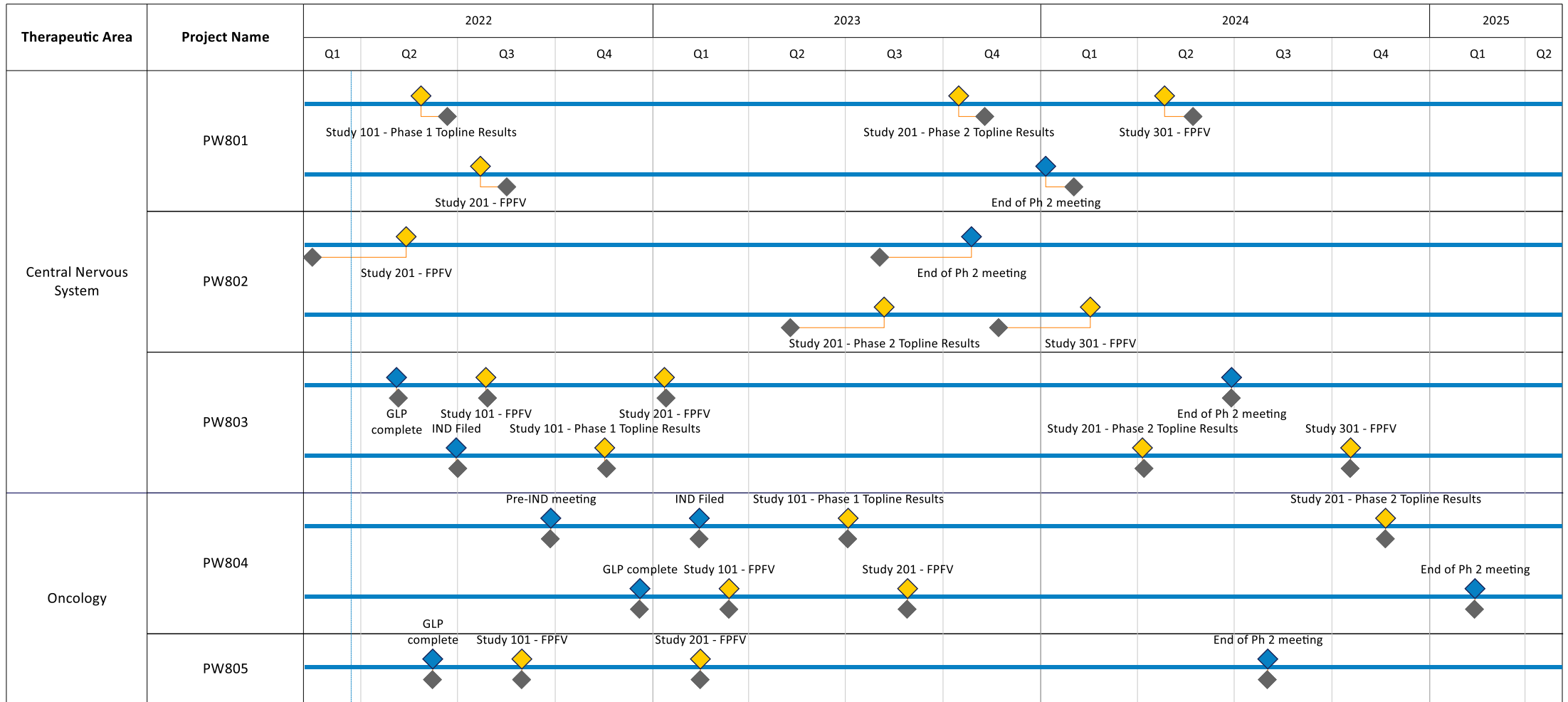
The **Create SnapIt Report** functionality allows you to create a presentation quality visualizations for a one or more projects.

TIMELINE

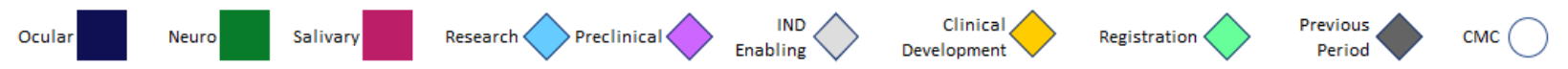
GANTT CHART

PORTFOLIO MILESTONE VARIANCE REPORT

JAN 2022 vs. DEC 2021 COMPARISON



This **SnapIt Report** shows comparison of milestones in two different reporting periods.



Start Ind.	Finish Ind.	Project Name	Current - Task/Milestone Name	Owner	Current Duration	Current Start	Current Finish	Previous - Task/Milestone Name	Previous Duration	Previous Start	Previous Finish	Reason	Impact
←	→	Project A	Design	Ira Brown	40 days	3/20/2015	5/15/2015	Design	22 days	3/26/2015	4/27/2015		
←	→	Project A	Develop functional specifications	Ira Brown	25 days	3/25/2015	4/29/2015	Develop functional specifications	7 days	3/31/2015	4/9/2015		
→	→	Project A	Review functional specifications	Ira Brown	3 days	4/29/2015	5/4/2015	Review functional specifications	3 days	4/9/2015	4/14/2015		
→	→	Project A	Incorporate feedback into functional specifications	Ira Brown	6 days	5/4/2015	5/12/2015	Incorporate feedback into functional specifications	6 days	4/14/2015	4/22/2015		
→	→	Project A	Design complete	Ira Brown	0 days	5/15/2015	5/15/2015	Design complete	0 days	4/27/2015	4/27/2015		
→	→	Project A	Development	Ira Brown	21 days	5/18/2015	6/16/2015	Development	21 days	4/28/2015	5/27/2015		
→	→	Project A	Review functional specifications	Ira Brown	0 days	5/18/2015	5/18/2015	Review functional specifications	0 days	4/28/2015	4/28/2015		
→	→	Project A	Development complete	Ira Brown	0 days	6/16/2015	6/16/2015	Development complete	0 days	5/27/2015	5/27/2015		
→	→	Project A	Testing	Ira Brown	49 days	5/21/2015	7/29/2015	Testing	49 days	5/1/2015	7/9/2015		
→	→	Project A	Develop unit test plans using product specifications	Ira Brown	3 days	5/21/2015	5/26/2015	Develop unit test plans using product specifications	3 days	5/1/2015	5/6/2015		
→	→	Project A	Integration testing complete	Ira Brown	0 days	7/29/2015	7/29/2015	Integration testing complete	0 days	7/9/2015	7/9/2015		
→	→	Project A	Training	Ira Brown	39 days	6/15/2015	8/7/2015	Training	39 days	5/26/2015	7/20/2015		
→	→	Project A	Develop training specifications for end users	Ira Brown	2 days	6/17/2015	6/19/2015	Develop training specifications for end users	2 days	5/28/2015	6/1/2015		
→	→	Project A	Training materials complete	Ira Brown	0 days	8/7/2015	8/7/2015	Training materials complete	0 days	7/20/2015	7/20/2015		
→	→	Project A	Documentation	Ira Brown	21 days	6/15/2015	7/14/2015	Documentation	21 days	5/26/2015	6/24/2015		
→	→	Project A	Develop Help specification	Ira Brown	0 days	6/15/2015	6/15/2015	Develop Help specification	0 days	5/26/2015	5/26/2015		
→	→	Project A	Documentation complete	Ira Brown	0 days	7/14/2015	7/14/2015	Documentation complete	0 days	6/24/2015	6/24/2015		
→	→	Project A	Pilot	Ira Brown	63 days	5/21/2015	8/18/2015	Pilot	63 days	5/1/2015	7/29/2015		
→	→	Project A	Identify test group	Ira Brown	0 days	5/21/2015	5/21/2015	Identify test group	0 days	5/1/2015	5/1/2015		
→	→	Project A	Pilot complete	Ira Brown	0 days	8/18/2015	8/18/2015	Pilot complete	0 days	7/29/2015	7/29/2015		
→	→	Project A	Deployment	Ira Brown	8 days	8/19/2015	8/31/2015	Deployment	8 days	7/30/2015	8/11/2015		

The SnapIt! Change Report only includes those tasks or milestones that have changed beyond your established threshold from one reporting period to another. You can then capture the **Reason** and **Impact** of each change across the portfolio in a consolidated report.

Thank You!

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