

EPK-Suite

for Project, Portfolio, and Resource Management

EPK Group applied its years of experience in the project and portfolio management field to produce EPK-Suite, a comprehensive Portfolio/Project/ Program, Resource and Cost management system which can meet a wide range of business requirements. EPK-Suite has been successfully implemented by customers in the IT, financial, engineering, retail, professional services, and pharmaceutical fields. If you're trying to meet constantly changing priorities with limited budget and resources, EPK-Suite can help.

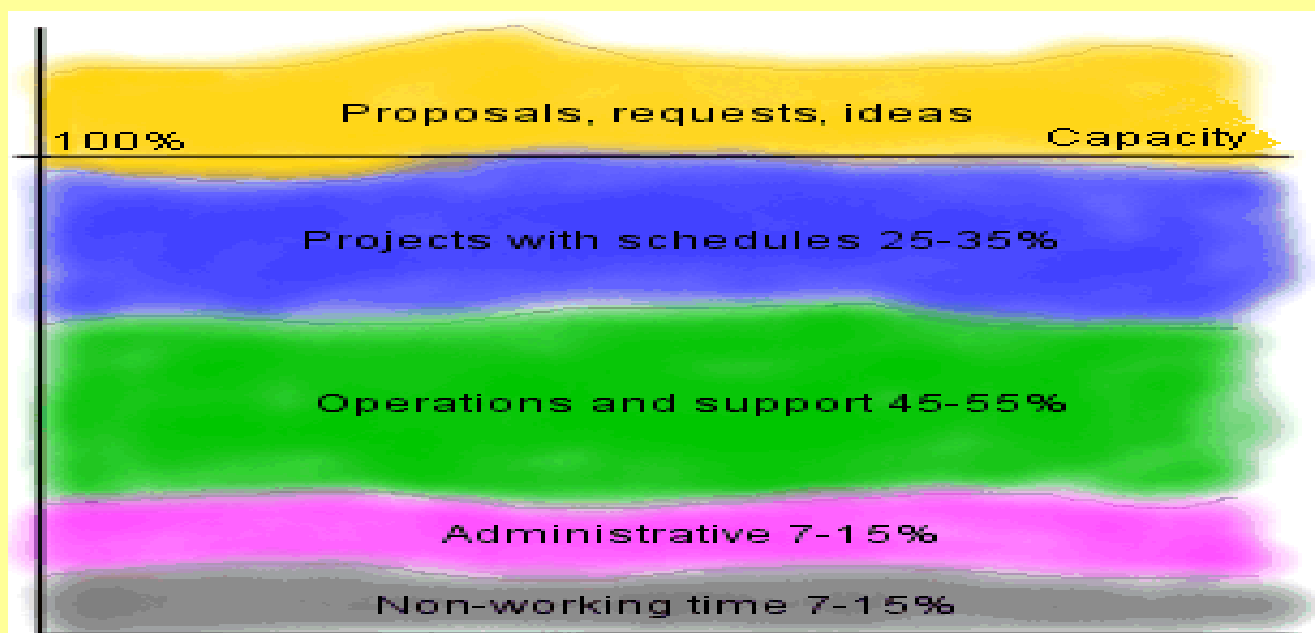
Key strengths of EPK-Suite are:

- *The system helps manage ALL efforts, major projects and ongoing support and operational work.*
- *Unique capabilities in resource planning and analysis, a key problem area for many organizations.*
- *Browser based planning for projects and operations.*
- *Technical architecture based on the most current industry standards.*
- *Implementation in a short timeframe to achieve production results quickly at low cost.*
- *Applicability to organizations at any level of project management maturity.*

EPK-Suite Manages ALL Efforts

Central to EPK Group's approach is the fact that real portfolio and resource management requires that ALL efforts are considered, not just major projects. Studies by leading industry analysts have consistently shown that the majority of work in an organization is support and operations (keeping the business running). Major projects usually account for just a minor portion of the total organizational effort. In today's matrix organizations, many resources working on major projects are also involved with day to day operational efforts. Those same resources are often involved in new initiatives which had not been considered during the annual budgeting cycle. Accurate resource planning and analysis also has to consider the effect of planned non-working time such as vacations, and routine administrative time. EPK-Suite handles all of this in a simple yet comprehensive manner.

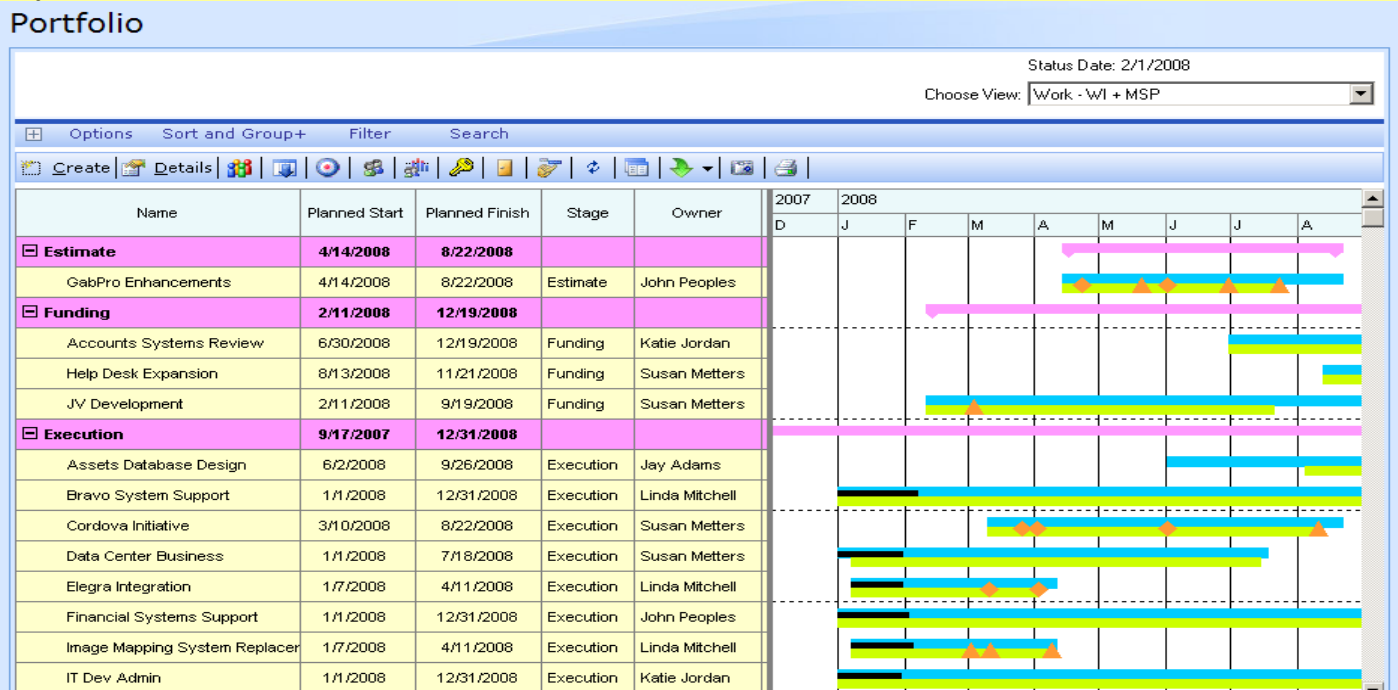
This graph shows a typical pattern of various types of effort:



Portfolio and Project Management

- All efforts can be budgeted, and key dates established.
- Configurable stage-gates can be set to suit your process workflow.
- Multiple reporting calendars can be maintained for budgeting, resource planning, timesheet reporting.
- Executive views allow drill down into multiple projects, highlighting critical milestones.
- Powerful views generator includes dashboards, scorecards, Gantt charts, graphical indicators, and sorting/grouping/filtering/totaling options. Views can be used as web parts on your portal.
- Comprehensive security functionality.
- Interactive Scenario Modeler.

Key Milestones View:



Budgeted hours and cost vs. timesheet actual hours and cost (with color coded variance):

Portfolio

Status Date: 2/1/2008
Choose View: Timesheets

Options Sort and Group+ Filter Search

Create Details

Name	Category	Jan 08		Feb 08		Mar 08		Apr 08	
		hr	Cost	hr	Cost	hr	Cost	hr	Cost
John Peoples	Timesheet Actuals	654	\$32,868.00	144	\$6,884.00				
	Estimate	490	\$25,810.00	782	\$41,138.00	1080	\$57,140.00	1268	\$67,332.00
Financial Systems Support	Timesheet Actuals	296	\$14,910.00	104	\$4,884.00				
	Labor	296	\$14,910.00	104	\$4,884.00				
	Inhouse	296	\$14,910.00	104	\$4,884.00				
	DB Administrator	44	\$2,860.00	4	\$260.00				
	Developer	198	\$9,504.00	36	\$1,728.00				
	Tech Communicator	34	\$1,666.00	16	\$784.00				
	Tester	20	\$880.00	48	\$2,112.00				
	Estimate	210	\$12,100.00	512	\$27,568.00	600	\$32,500.00	528	\$28,352.00

Resource Planning and Analysis

- EPK-Suite helps all managers handle their “Capacity vs. Demand Management” requirements.
- The system’s “negotiation” function enables communication between line managers and project managers/executives.
- Personal Time Planner allows staff and managers to plan time off and routine activity.
- Simple, yet comprehensive, spreadsheet-style user interface.
- Managers can see all their staff’s current commitments to both project work and operational/support efforts.
- Managers have immediate access to their staff’s true “remaining availability”.

Resource Planning Worksheet: Resource Plan for PI Help Desk Expansion

Options Columns Sort and Group Colors													
Action Tools Options													
PM	RM	ID	Group	Cost Category	Role	Department	Resource	Jul 08	Aug 08	Sep 08	Oct 08	Nov 08	Dec 08
		C0322	M0321	Labor.Inhouse	...Business Analyst	Dev - New York			160	100	50	100	
Add Candidates Match Commitments Columns Remaining													
% Match	Candidate Name	CC/Role		Department		06/29 07/26	07/27 08/23	08/24 09/27	09/28 10/25	10/26 11/22	11/23 12/27	Remaining	
100	Andreas Berglund	Labor.Inhouse.Business Analyst		Dev - New York		152	160	192	152	152	184		
50	Brenda Diaz	Labor.Inhouse.Tester		Dev - New York		152	160	192	152	152	184		
50	Brian Groth	Labor.Inhouse.Consultant		Dev - New York		152	160	192	152	152	184		
50	Charles Fitzgerald	Labor.Inhouse.Developer		Dev - New York		152	160	192	152	152	184		
50	Diane Tibbott	Labor.Inhouse.Tech Communicator		Dev - New York		152	160	192	152	152	184		
50	John Evans	Labor.Inhouse.Consultant		Dev - New York		152	160	192	152	152	184		
50	Scott Cooper	Labor.Inhouse.Department Manager		Dev - New York		152	160	192	152	152	184		

Analyzing “Capacity vs. Demand”: Resource Plans for Department: Dev - San Jose

Details Totals Columns Sort and Group Search Capacity Scenarios																				
Return to Depts Show Totals Graph Edit Resource Plan																				
Row Type	Department	Role	Portfolio Item	Resource	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08								
Commitment	Dev - San Jose	Business Analyst	Job Costing System	John Peoples	32	32	40	80												
Commitment	Dev - San Jose	Business Analyst	Financial Systems Support	John Peoples	160	160	200	160	160	200	160	160								
Commitment	Dev - San Jose	Business Analyst	Accounts Systems Review	Linda Mitchell							80	80								
Commitment	Dev - San Jose	Business Analyst	Management Reports	Linda Mitchell	100	100														
Commitment	Dev - San Jose	Business Analyst	Elegra Integration	Linda Mitchell	100															
Commitment	Dev - San Jose	Business Analyst	GabPro Enhancements	Linda Mitchell				100	60	60	100									
Commitment	Dev - San Jose	Business Analyst	Image Mapping System Replacement	Linda Mitchell	120	120	120													
Commitment	Dev - San Jose	Business Analyst	JV Development	Susan Metters	200		200	100	100	80	100	100								
Commitment	Dev - San Jose	Business Analyst	Cordova Initiative	Susan Metters			80	80				80								
Commitment	Dev - San Jose	Business Analyst	Data Center Business	Susan Metters	100	100	100	100	100	100										
Commitment	Dev - San Jose	DB Administrator	Job Costing System	Elizabeth Keyser	50	50	80	100												
Commitment	Dev - San Jose	DB Administrator	Elegra Integration	Elizabeth Keyser	60	40	40													
Commitment	Dev - San Jose	DB Administrator	GabPro Enhancements	Elizabeth Keyser					40	40										
Totals					612	304	512	304	740	400	620	320	420	320	440	400	440	320	420	320
Dev - San Jose Business Analyst					612	304	512	304	740	400	620	320	420	320	440	400	440	320	420	320
Dev - San Jose DB Administrator					250	304	350	304	420	400	320	320	120	320	240	400	80	320	80	320
Dev - San Jose Developer					614	1064	794	1064	1070	1400	1070	1120	770	1120	870	1400	770	1120	670	1120
Dev - San Jose Labor.Inhouse.Developer					614	1064	794	1064	1070	1400	1070	1120	770	1120	870	1400	770	1120	670	1120
Dev - San Jose Project Manager					40	N/A	60	N/A	100	N/A	100	N/A	100	N/A	100	N/A	100	N/A	100	N/A
Dev - San Jose Labor.Inhouse.Project Manager					40	N/A	60	N/A	100	N/A	100	N/A	100	N/A	100	N/A	100	N/A	100	N/A
Dev - San Jose Tech Communicator					100	304	192	304	200	400	248	320	200	320	140	400	100	320	128	320
Dev - San Jose Labor.Inhouse.Tech Communicator					100	304	192	304	200	400	248	320	200	320	140	400	100	320	128	320
Dev - San Jose Tester					220	304	240	304	262	400	382	320	242	320	422	400	462	320	502	320
Dev - San Jose Labor.Inhouse.Tester					220	304	240	304	262	400	382	320	242	320	422	400	462	320	502	320

Comprehensive Timesheet Capability

- Timesheets cover ALL efforts including projects, support, time off.
- Self-service Personal Time Planner allows staff to schedule time off and routine activities thereby reducing their overall availability for assigned work in the future.
- Managers can specify the level at which actual hours will be collected.
- Detail task status can be reported to project managers by actual start and finish dates, percent complete, remaining work, or expected finish date.
- Managers can control when items are “open” or “closed” to charging time.
- The “Project Explorer” lets resources see the overall project plan.
- Approval by both line managers and project managers is supported.
- The EPK-Suite timesheet can be integrated with help desk and accounting systems.

Timesheet:

Development Timesheet - Katie Jordan*

Timesheet

2/3/2008 - 2/9/2008 | Copy Row | Non-Work | View

PI	Task / VM	Charge Code	Percent Complete	Ticket No	Mon 04	Tue 05	Wed 06	Thu 07	Fri 08	TOTALS
Accounts Systems Review		A8-0005								
Financial Systems Support	Enhancements	A8-1123		45876						
IT Dev Admin	Admin and Mgmt	A8-0005			6					6
IT Dev Admin	Meetings	A8-0001								
IT Dev Admin	Marketing	A8-0003			2					2
TOTALS					8					8

Project Explorer

Filters Search

Add Project Expand Row

Name	Charge Code	Start Date	Finish Date	2008
Accounts Systems Review	A8-0005	6/30/2008	12/19/2008	May Jun Jul Aug Sep Oct Nov Dec
Technical Architecture Assessment		6/30/2008	7/4/2008	
Categorize Systems Inventory		7/7/2008	7/18/2008	
Update Technical Summary Legacy Model		7/21/2008	7/23/2008	
Summarize Technological Attributes		7/24/2008	8/13/2008	
Inventory Enterprise Physical Systems		8/14/2008	8/19/2008	

Team Collaboration

EPK-Suite integrates with Microsoft Windows SharePoint Services (WSS) for team collaboration and document management, tracking issues, risks, change control, etc.

- Views showing issues, risks, any WSS custom data created across multiple team sites.
- The full functionality of the EPK-Suite views generator can be used. This includes graphical indicators, export to Excel and other applications, and comprehensive printing.

Explorer Choose a view: Issue view

Options Sort and Group + Filter Search Projects

Return to Portfolio Center | Go To Site

Item Name	Issue Title	Issue Status	Owner	Due Date	On Schedule	Priority
(1) High						
In proposed stage before a project	Feasibility study taking significant effort	(1) Active		3/17/2005	●	(1) High
(2) Medium						
Effort totalling 200 hrs	issue3 for Q	(1) Active			●	(2) Medium
Storage Service Business	Storage space problem	(1) Active		2/25/2005	●	(2) Medium
Supporting Financial Application	Lack of Java staff	(1) Active		3/10/2005	●	(2) Medium
Storage Service Business	Technology changing	(1) Active		3/18/2005	●	(2) Medium
Effort totalling 200 hrs	Delay in dependency	(1) Active		4/22/2005	●	(2) Medium
(3) Low						
Internet Help Desk	New IE version	(1) Active		2/25/2005	●	(3) Low

Implementation with Rapid Results

An organization seeking to improve its overall project and portfolio management effectiveness shouldn't have to wait six months to see benefits. EPK-Suite can be implemented in a short timeframe at low cost. EPK Group offers its optional Rapid Results implementation services package which enables your organization *to begin producing results in 4-6 weeks*. A broad range of configuration, training, and customer integration services is also available through the EPK Certified Implementation Partners. Rapid Results will let senior management get a handle on ALL efforts in the organization quickly, and begins by producing an inventory of all major projects and support/operational efforts and the key meta-data related to them. This is the first step to ensuring that proper prioritization of work can take place. Another early focus of Rapid Results is the configuration and implementation of a "stage-gate" process for the organization to assure that every initiative follows a structured path from initiation through approval, execution, and closeout.

About EPK Group LLC

The EPK Group founders average more than 25 years experience in the project management field, including the consulting, implementation, and project management systems development. Over that period they have led the development and introduction to the marketplace of many leading edge project management systems on platforms from mainframes to today's web servers. Microsoft acquired their Enterprise Project product in 2000, and as part of that acquisition the EPK Group founders joined the Microsoft Project development team which produced Microsoft Project Professional and Microsoft Project Server. Since 2003 EPK Group has been dedicated to advancing the state of the art in project portfolio and resource management by working closely with our customer base to continually enhance EPK-Suite.

Your Next Steps:

We offer several ways for you learn how EPK-Suite can meet your organization's requirements:

- Schedule a comprehensive webcast demo of EPK-Suite. In just 60 minutes you will see the full capabilities of the system and understand how system configuration can meet your unique business requirements.
- Schedule an on-site demonstration at your facility by EPK Group or one of our Certified Implementation Partners.
- Arrange for a 30 day, free evaluation of EPK-Suite at your location. The system installs in 30 minutes and we include a completely configured database and 100 pages Guided Tour which walks you through all system functions. You can also configure your own database to meet individual business requirements.
- Arrange for a hosted system evaluation.

To arrange your webcast demonstration, or 30 day free system evaluation:

www.epkgroup.com

Email: info@epkgroup.com

Call (561) 310-7279.