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Portlight Technology (Pty) Ltd

ProFormance functionality overview

A high level overview of the functionality in Portlight Technology's project and portfolio management product - ProFormance

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1. Introduction

1.1. ProFormance is a project management tool used to capture, track, and report on ideas or projects, captured in a common SQL Server database. Portfolios, programs and projects are tracked according to schedule and cost. ProFormance interfaces with financial systems like SAP and incorporates a full document management facility with version control, audit trail, release strategies and system generated e-mail notifications, underpinned by strong multilevel reporting.

2. Architecture

- 2.1. ProFormance is a WPF based application developed on Microsoft's Windows Presentation Foundation platform providing a rich user experience.
- 2.2. The client application is installed on the user's computer by either publishing / assigning it through Microsoft Active Directory or manual installation.

3. Overview of module functionality

- 3.1. Base Product (required)
 - 3.1.1. ProFormance base product framework, including scheduling and financial modules for capital project management.
- 3.2. Workflow
 - 3.2.1. Integrated workflow module, for email notifications on all actions throughout the system. Document approvals and document sequencing enabled when the Document Management module is installed.
- 3.3. Document Management
 - 3.3.1. Full integrated document management, direct interfacing with Microsoft Word 2003 and later, audit trail and version control.
- 3.4. Web interface
 - 3.4.1. Enables the general population at an organisation to capture ideas, raise and view register items and view basic reports. Users of the web interface module do not need a per user license.
- 3.5. Six Sigma
 - 3.5.1. Six Sigma project management methodology.
- 3.6. Earned Value Management
 - 3.6.1. Earned value dashboard and reports.
- 3.7. Commissioning
 - 3.7.1. Track and schedule systems, and packages for large commissioning projects.

4. ProFormance overview

4.1. Security

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- Filters	Users				
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- Matter data Auto Numbering of Itens - Preferences	Roles	Champion Administrator Administrator Document administrator Pan administrator Motor data administrator User User Resource reward administration	Projecto Manager / Manager Projecto Manager / Manager	Tracking Complete	
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Figure 1 User security

- 4.1.1. ProFormance offers multiple security profiles providing granular control over user interaction with the system. Roles vary from full site administrator to read only profiles.
- 4.1.2. The system is capable of recognizing a user's domain login credentials eliminating the need for logging on more than once.
- 4.1.3. ProFormance allows for different security profiles, which would allow the following:
 - 4.1.3.1. Full administration
 - 4.1.3.2. User administration
 - 4.1.3.3. Document administration
 - 4.1.3.4. Plan (schedules) administration
 - 4.1.3.5. Master data administration
 - 4.1.3.6. Normal user
 - 4.1.3.7. Resource rewards administration
 - 4.1.3.8. Update of forecasted milestones
- 4.1.4. Document and plan approval can be assigned to users by assigning designations for each document or plan template.
- 4.1.5. Users can be assigned to different levels of the organisation, where they will only be able to interact with locations, projects, contracts, etc. from that level onwards.

4.2. Master data

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Filters	Project Type	
Portfolios Programs Ideas Projects Settings Cal Document templotes Cal Document templotes Cal Dana templotes Cal Dana Mainte data Mainte data	Name* Innovation Securice* 1 Location* * AcME - Workholds Enterprises * ACME - Richards Bay Betinery ACME - Richards Bay Parts * ACME - Durban Relinery ACME - Durban Re	

Figure 2 Master data

- 4.2.1.1. Most master data used in field lists are configurable.
- 4.2.1.2. ProFormance has the ability to have auto numbers assigned to different items, which can be set up for different locations in the organisation.
- 4.2.1.3. Rename, disable or change the sequence of reports in the system.
- 4.2.1.4. Customise tab names in the system.
- 4.2.1.5. Many more customisable features.

4.3. Tree view

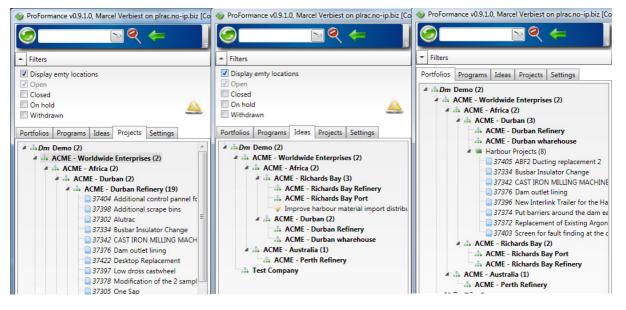


Figure 3 Tree view - Projects, Ideas and Portfolios

- 4.3.1.1. Users will see a hierarchical tree structure, representing the physical or functional layout of their organization.
- 4.3.1.2. Users will only see the part of the organization that they have been assigned via ProFormance's security mechanism.
- 4.3.1.3. Filters for the tree view make complex organizational elements more concise, while the full text search capability allows the user to search for specific words / phrases present in the tree.
- 4.3.1.4. The tree view window has the following tabs:
 - 4.3.1.4.1. Portfolios
 - 4.3.1.4.1.1. The user has the ability to create any number of portfolios which allows him / her to logically group projects.
 - 4.3.1.4.1.2. The system is able to report across portfolios. This is as simple as clicking on a portfolio and running the report. All roll-ups function automatically.
 - 4.3.1.4.2. Programs
 - 4.3.1.4.2.1. The user has the ability to create any number of programs which allows him / her to logically group projects according to criteria.
 - 4.3.1.4.3. Ideas
 - 4.3.1.4.3.1. The ideas tab displays a hierarchical tree view of all locations with their ideas raised. These ideas can also come from ProFormance's web interface.
 - 4.3.1.4.4. Projects
 - 4.3.1.4.4.1. The projects tab displays a hierarchical tree view of all locations with their elements, like locations, projects, contracts etc.

4.3.1.4.5. Settings

4.3.1.4.5.1. The settings tab contains all settings, including user rights assignment, adding / editing of document and project plan templates and updating of master data.

4.4. Details window

4.4.1. Summary tab

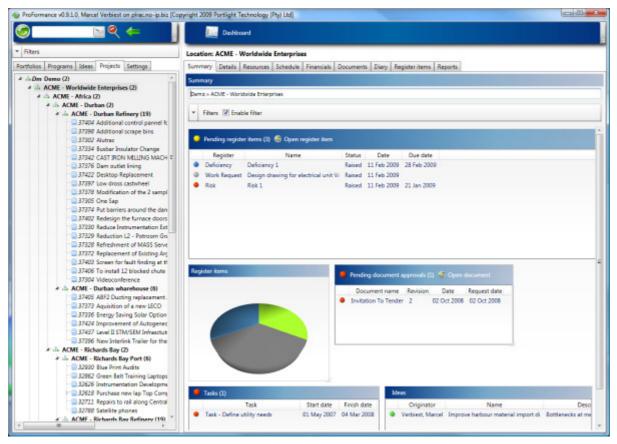


Figure 4 Dashboard

ProFormance vDevelopment, Marcel Verbiest on . [Copyright 2009 Portlight Techr	nology (Pty) Ltd]	
Dashboard		
Location: RBM		
Summary Details Resources Schedule Financials Financial scheduling Doo	scuments Diary Register items Reports	
Summary		
RBM		
▼ Filters ▼ Enable filter		
Earned value progress		<u>í</u>
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Earned value indexes Earned value variance		
2		
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Pending register items 🍥 Open register item	Originator Name Description Date	
Register Name Status Start date Due date	Verbiest, Marcel zar czc 23 Jun 20 Document name Revision Date Request date	
	Verbiest, Marcel zzz idea zxczc 23 Jun 20	
	4 <u>m</u>	
		*]

Figure 5 Earned Value Dashboard

4.4.1.1. The dash board contains a number of independent information blocks (widgets) to display summary information. A user can hide, display or move these widgets around (to personalize his/her summary pages). Data displayed in these widgets would typically be open items, open register items, tasks, documents for approval, register items etc. and may be displayed as bar / pie charts or tabulated data with traffic lights showing whether items are upcoming / due / behind schedule.

4.4.2. Details tab

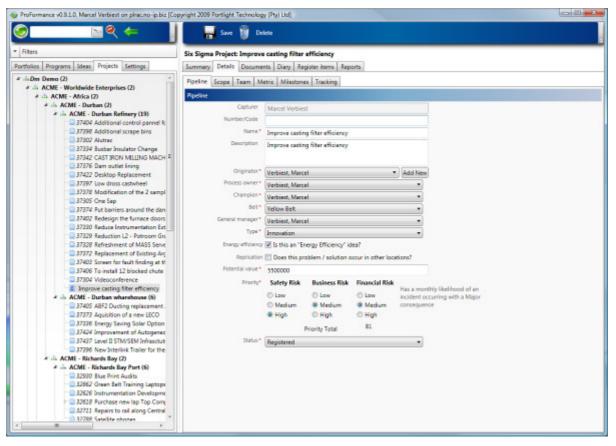


Figure 6 Item details

- 4.4.2.1. Item details are entered on this tab.
- 4.4.2.2. The level of details displays varies for each item type, e.g.:
 - 4.4.2.2.1. Capital projects

4.4.2.2.1.1. More fields than for example locations.

4.4.2.2.2. Six Sigma projects

4.4.2.2.2.1. Details view contains sub-tabs:
4.4.2.2.2.1.1. Pipeline sub-tab
4.4.2.2.2.1.2. Scope sub-tabs
4.4.2.2.2.1.3. Team sub-tab
4.4.2.2.2.1.4. Metrics sub-tab

ProFormance v0.9.1.0, Marcel Verbiest on phracmo-ip biz (Co	pyright 2009 Portlight Technology		Remove selected metrics		
* Filters Portfolios Programs Ideas Projects Settings	Six Sigma Project: Improve				
*h.Den Demo (2) *h. ACME - Worldwide Enterprises (2) *h. ACME - Atrica (2)	Pipeline Scope Team Me Metric	tric Milestones Tracking	3		
# ds ACME - Durban (2)		Description	Unit of measure	Baseline	Target
# in ACME - Durban Refinery (19)	Metric 1	Liquid throughput	ton p/h	0.75	1.4
37398 Additional scrape bins 37302 Alutrac 37334 Busbar Insulator Change	Metric 2 Sigma level		MW	3	11

Figure 7 Metrics (KPI's)

4.4.2.2.2.1.5.	Milestones sub-tab
4.4.2.2.2.1.6.	Tracking sub-tab

4.4.2.2.3. Commissioning projects / systems

4.4.2.2.3.1. Details view contains sub-tabs:

4.4.2.2.3.1.1. Systems sub-tab

4.4.2.2.3.1.2. Packages sub-tabs

4.4.2.2.3.1.3. Documents to review sub-tab

4.4.3. Resources tab

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Filters	Capital Project: Additional control pannel for furnace tilting control							
ortfolios Programs Ideas Projects Settings	Summary Details Re	sources Schedule Finance	ials Documents Dia	ary Register items Repo	orts			
A Dm Demo (2)	Resources							
ACME - Worldwide Enterprises (2) ACME - Africa (2)	Al reward members	receive the same reward						
# ch ACME - Durban (2)	Resource	Type of resource	Receives reward	Reward type	Reward amount	Reward payment date		
# 🚠 ACME - Durban Refinery (19)	Roth, Gerhard	Developer				15		
 37404 Additional control pannel k 37398 Additional scrape bins 	Verbiest Marcel	Team Member				(1)		
37302 Alutrac	This way, interce		-	Monthly Cash		121		
- 37334 Busber Insulator Change				Quarterly Cash (1X)				
- 37342 CAST IRON MELLING MACH				Quarterly Cash (2.5K)				
- 37376 Dam outlet lining				Quarterly Cash (SK) Annual Cash				
37422 Desktop Replacement				Voucher				
37397 Low dross castwheel								
37378 Modification of the 2 sampl								
- 37305 One sap	Total team reward							
- 37402 Redesign the furnace doors	Total team re	head	0.00					
37330 Reduce Instrumentation Ext			0.00					
37329 Reduction L2 - Potroom Gri								
- 37328 Refreshment of MASS Serve								
37372 Replacement of Existing Arg								
37403 Screen for fault finding at the								
37406 To install 12 blocked chute								
- 37304 Videoconference								
Improve casting filter efficiency								
ACME - Durban wharehouse (6)								
37405 ABF2 Ducting replacement. 37373 Aguisition of a new LECO								
37373 Aguistion of a new LECO								
37424 Improvement of Autogenec								
37437 Level II STM/SEM Infrasctut								
- 37396 New Interlink Trailer for the								
# sh ACME - Richards Bay (2)								
# ACME - Richards Bay Port (6)								
32930 Blue Print Audits								
- 32862 Green Belt Training Laptops								
32626 Instrumentation Developme								
22628 Purchase new lap Top Com								
32721 Repairs to rail along Central 32788 Satellite phones								
a synthetic phones								

Figure 8 Resources

- 4.4.3.1. Resources may be added to projects which allow them to book hours against the project.
- 4.4.3.2. These resources make up the project team.
- 4.4.3.3. ProFormance has the ability to assign rewards to resources.

4.4.4. Schedule tab

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orldwide Enterprises (2) Atrica (2)			Ban	eline		Res	ined		Actua	al	
IE - Durban (2)	Milestone	Start date		Finish date		Start date	Finish da	te	Start date	Finish d	
CME - Durban Refinery (19)	Started	2009/02/01	15	2009/02/03	15	[15]	-	15	1		
37404 Additional control pannel for fumace tilting contr			-		-	Loose A		and a local division of the local division o	the second se		
37398 Additional scrape bins	Investigation	2009/02/04	15	2009/02/27	15.	2009/02/10	2009/02/25	15	15		
37302 Alutrac	Authorised	2009/02/17	15	2009/02/28	15	15	-	15	15		
37334 Busbar Insulator Change 37342 CAST IRON MILLING MACHINE PURCHASE	Implementation		_	Contraction of the second s	_			and a second second			
37376 Dam outlet lining			15		15	15		15	15		
37422 Desktop Replacement	Completed	2009/03/30	15	2009/03/31	15	15		15	15		
37397 Low dross castwheel	Review	2009/04/01	15	2009/02/10	15	[15]	i	15	55		
37378 Modification of the 2 sampling tarins			Canada Section		-			And a local division of the local division o	Canal Land		
37305 One Sap	Closed	2009/04/13	15	2009/04/13	15)	15		15	15		
37374 Put barriers around the dam east	+ Use MS Project plan										
37402 Redesign the furnace doors floor plates											
37330 Reduce Instrumentation External Services Costs 37329 Reduction L2 - Potroom Graphic Terminal Upgrac	Available plans										
37328 Refreshment of MASS Servers	Include sub items										
37372 Replacement of Existing Argon Bulk Tank with 10	Number/Code	Nam		Plan	type	e Revis Date Author Che	ic Checked out b	by Status St	tatus by	Belon	
37403 Screen for fault finding at the casting area for fun											
37406 To install 12 blocked chute detectors at Carbon R											
37304 Videoconference											
Improve casting filter efficiency											
CME - Durban wharehouse (6)											
37405 ABF2 Ducting replacement 2											
37373 Aquisition of a new LBCO 37336 Energy Saving Solar Option											
37424 Improvement of Autogeneous Mill Main Extractio											
37437 Level II STM/SEM Infrasctuture Replacement											
37396 New Interlink Trailer for the Harbour											
IE - Richards Bay (2)											
CME - Richards Bay Port (6)	* Tasks										
32930 Blue Print Audits											
32862 Green Belt Training Laptops											
32626 Instrumentation Development PC Upgrade (Casth											
32638 Purchase new lap Top Computer for control room											
32788 Satellite phones											
AV/00 Sate the Decides											

Figure 9 Schedule

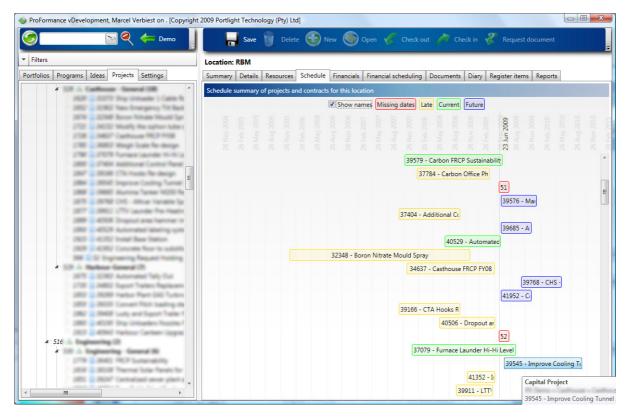


Figure 10 Schedule summary for locations

- 4.4.4.1. MS Project can be used to track tasks and milestones. These project files come from templates set up in ProFormance.
- 4.4.4.2. Manual entry of milestones is also possible, but will disable using a template MS Project plan.
- 4.4.4.3. Key milestones are pre-linked to the correct milestone and in the case of the user deleting a key milestone; the system will prompt the user to specify a new key milestone to replace the deleted one. This concept of key milestones facilitates cross project / contract reporting. Projects are compared utilizing these key milestones, allowing true "apples with apples" reporting.
- 4.4.4.4. Schedule and actual dates are automatically updated for the projects in ProFormance, allowing true rollup reporting across a portfolio of projects whilst project plans are saved centrally with full security, backup and audit trail of every change made.

4.4.5. Financials tab

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CME - Durban Refinery (19)	C. Sector States of Management	Mar 2006	Apr 2008	May 2006	Aun 2006	AJ 2008	Aug 2008	Sep 2008	
37404 Additional control pannel for furnace tilting contr	# Cost	mar 2000	144 2000	may even	101 2008	101 2008	may arres	orth creat	
37398 Additional scrape bins	Initial Estimate								
37302 Alutrac	Capital								
37324 Busbar Insulator Change	Operating Cost							-	
37342 CAST IRON MILLING MACHINE PURCHASE	Plan								
37376 Dam outlet lining 37422 Desktop Replacement	Capital						1		
37397 Low dross castwheel									
37378 Modification of the 2 sampling tarins	Operating Cost								
37305 One Sap	Authorised								
37374 Put berriets around the dam east	Capital								
37402 Redesign the furnace doors floor plates	Operating Cost								
37330 Reduce Instrumentation External Services Costs	Forecast								
37329 Reduction L2 - Potroom Graphic Terminal Upgrac	Capital							-	
37328 Relveshment of MASS Servers	Operating Cost								
37372 Replacement of Existing Argon Bulk Tank with 10	Commitment								
37403 Screen for fault finding at the casting area for fun	Capital								
37406 To install 12 blocked chute detectors at Carbon R	Operating Cost								
37304 Videoconference	Actual								
Improve cacting filter efficiency	Capital								
CME - Durban wharehouse (6) 37405 ABF2 Ducting replacement 2	Operating Cost						3		
37373 Aquisition of a new LBCO	4 Benefit								
37336 Energy Saving Solar Option	Initial Extimate								
37424 Improvement of Autogeneous Mill Main Extractio	Improvement Savings								
37437 Level II STM/SEM Infractuture Replacement	ERIT								
37396 New Interlink Trailer for the Harbour	Mitigated Costs			1					
E - Richards Bay (2)	Plan	-							
CME - Richards Bay Port 00	Improvement Savings						1		
32930 Blue Print Audits	FRIT								
32862 Green Belt Training Laptops	Mitigated Costs						-	-	
32626 Instrumentation Development PC Upgrade (Casth	Authorised							-	
32618 Purchase new lap Top Computer for control room	Improvement Savings						1	-	
32711 Repairs to rail along Central Stores				-					
127MI Satellite phones	EBIT								

Figure 11 Financials - cash flow view

Files	Chillion Bullethan	and a film of the second							
	Six Sigma Project: Improv	-							
rtfolios Programs Ideas Projects Settings	Summary Details Docum	ents Diary Register items Rep	orta						
ch.Des Demo (2)	Pipeline Scope Team N	Pipeline Scope Team Metric Milestones Tracking							
#	Energials	Financials							
# -is ACME - Durban (2)	Financial plan is not rolled-u	Dels fro	m 2008/03/01	3	Refresh				
# in ACME - Durban Refinery (19)		P	2009/03/01	21	(Nerresn)				
27404 Additional control pannel	s: Cashflow view @ Trackin	ig view							
37398 Additional scrape bins	Value type Actual	 (Realised) 							
37302 Alutrac 37334 Busber Insulator Change		Metrics			Earnings		G		
27334 Builder Britlator Change 27342 CAST IRON MILLING MAG	Date Date	Liquid throughput (ton p/h)		Revenue		Mitigated cost			
37376 Dem outlet lining									
27422 Decktop Replacement	Year 1 detail								
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37378 Modification of the 2 sam	Apr 2008	2			-		-		
37305 One Sap 37374 Put barriers around the d					-				
27402 Redecion the furnace doc									
37330 Reduce Instrumentation 8		27							
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37328 Refreshe 🍲 Standard De	wiation						00		
27372 Replace	1 #1> H + 0 2 1	🚳 🗐 🕼 🖌 - 🗌 200%	• Fin	8 Not					
27407 Screen 1									
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27437 Level 1 : 27759 New Int # AOME - Richards Br # AOME - Richards Br # AOME - Richards Br 27050 Elus Pro					Target: 1.40				

Figure 12 Financials - tracking view

- 4.4.5.1. Project costs can be read directly from financial systems like SAP through ProFormance's RFC interface, or may be entered manually, in cases where no SAP interfacing is possible.
- 4.4.5.2. Projected benefits / savings on projects can also be tracked.
- 4.4.5.3. All financial figures roll up automatically and the user can drill-down to the underlying values by double clicking on a roll up value.
- 4.4.5.4. The user can adjust the period for viewing financials.
- 4.4.5.5. The user can choose between a cash flow and a financial tracking view. The financial tracking view includes project metrics (in the case of Six Sigma projects).
- 4.4.5.6. Budgeting fields are also part of the financials tab (budget approval year, budget approval reference number and the approved budget) to facilitate in budget overrun and cash flow reports, as well as tracking of budgets being re-assigned to other projects.

4.4.6. Documents tab

🖉 🔁 🖉	🔚 🙀 Save 🍿 Delete 😳 New 🍥 Open 🎸 Check out 🥕 Check in 🦑 Request document. 🥔 Request approval
Filters	Capital Project: Additional control pannel for furnace tilting control
Portfolios Programs Ideas Projects Settings	Summary Details Resources Schedule Financials Documents Diary Registeritems Reports
ADar Demo (2) ACME - Worklwide Enterprises (2) ACME - Worklwide Enterprises (2) ACME - Marka (2) ACME - Durban	Available documents Include sub-itema Number/Code Name Document type Revis Date Author Chec Checker Additional control pannel for fumace tilting c Invitation To Tender 1 04 Aun 2006 Gerhard Roth No
37329 Reduction L2 - Portoom Gri 37329 Reduction L2 - Portoom Gri 37328 Refreshment of MASS Sove 37328 Refreshment of Stating Ag 37403 Screen for fault finding at t? 37406 To instal 12 blocked chute 377304 Videoconference 377304 videoconference 377304 videoconference 377304 Advector and the efficiency * ds ACME - Durban wharehouse (6) 37405 ABF2 Ducting replacement. 37336 Inergy Saving Solar Option	Number/Code Additional control pannel for Additional control pannel for Description
 37424 Improvement of Autogenec 37437 Level II STM/SEM Infrasctut 	Document type Name Revision Date Author Status Status by
37396 New Interlink Trailer for the is: ACMI - Richards Bay (2) # ACMI - Richards Bay (2) # ACMI - Richards Bay Pett (6) 32560 Sive Print Audits 32562 Green Belt Training Laptops 32562 Purchase new lap Top Com 32723 Repairs to rail along Central 32723 Sequilite phones	Capital Expenditure Contractor Reference Invitation To Tender Additional control pannel for fumace titing c 1 04 Jun 2008 Gerhard Roth Approved Gerhard Rot Recommendation For Contract Award Variation Order General Activity Report
AZANA SATE THE DEGREE	

Figure 13 Documents from templates

- 4.4.6.1. ProFormance offers a comprehensive document management system that allows each site to define their own document templates that may be attached to virtually any level of the organization's hierarchy.
- 4.4.6.2. Editing is done via MS Word.
- 4.4.6.3. All documents are archived in a secure, central, controlled location with audit tracking and security. ProFormance can also interface with other document control systems such as SharePoint or Documentum. This, however, requires a level of customisation due to the document repositories not being standard everywhere.
- 4.4.6.4. Version control allows full audit trail of when documents were changed, and by whom, whilst the "Checkout" feature allows only one team member at a time to make changes to any specific document.
- 4.4.6.5. A user can also use the "Request document" function to send an email notification to the person that currently has the document "Checked out".
- 4.4.6.6. Once finished, the user may then choose to check it in, which means multiple users working on the same project, won't need to duplicate documents.
- 4.4.6.7. The e-mail notification feature permits excellent communication between team members as well as between project managers and management and the user will receive e-mail notification when:
 - 4.4.6.7.1. A document is ready to be approved.
 - 4.4.6.7.2. A document has been approved.

4.4.7. Diary tab

S 🛛 🖉 🗲	sa 🚽	e 🗑 Delete I	😧 New (💽 Open	🚖 Gr	nail 🌾 Check our		kin 🦧 Re		
Filters	Capital Project	Additional contr	ol pannel fo	r furnace ti	Iting con	trol			(Open version
Portfolios Programs Ideas Projects Settings	Summary Deta	ils Resources So	hedule Fina	cials Docu	menti D	Nary Register items	Reports			
*	Available attach	ments								New comment
# 📥 ACME - Worldwide Enterprises (2)		arma 🔲 Poeview							- 4	Doen comment
# -th ACME - Africa (2)	Number/Code	Name	Attachment I	and Desiring	Indexed	File name	Date	Attached by		BEIOROS V
# dis ACME - Durban (2)		DSC 1570.00G	General	1	No	DSC 1570JPG			During 27	404 Additional cont
# ACME - Durban Refinery (19)				÷.						
- 37404 Additional control pannel fc 37398 Additional scrape bins		Sample E-mail.htm		1	No	Sample E-mail.htm				404 Additional contr
37399 Additional scrape ons		Document Scan.pdf		1	No	Document Scan.pdf				
37334 Busbar Insulator Change		SCAN1279_000.18	General	1	Yes	SC4N1279_000.0F	04 Jun 2006	Gerhard Roth	Project - 374	404 Additional cont
37342 CAST IRON MILLING MACH										
- 37376 Dam outlet lining										
37422 Desktop Replacement										
- 37397 Low dross castwheel										
37378 Modification of the 2 sampl					81					
- 37305 One Sap	Attachment deta	a								
- 37374 Put barriers around the dan										
37402 Redesign the furnace doors	Capturer	Gerhard Roth			Date		ed out Checke	d out by Status		
37330 Reduce Instrumentation Est	Number/Code			1 04.1	un 2008	Gerhard Roth No		None		
37329 Reduction L2 - Potroom Gri	Name*									
37328 Refreshment of MASS Serve		SCAN1279_000.4F								
 37372 Replacement of Existing Arc 37403 Screen for fault finding at th 	Description									
37405 Screen for fault finding at 9										
37304 Videoconference										
Improve casting filter efficiency	Attachment	General								
ACME - Durban wharehouse (6)	type	10.00 P.								
37405 ABF2 Ducting replacement.										
37373 Aquisition of a new LECO										
37336 Energy Saving Solar Option										
37424 Improvement of Autogenec	Comments									
37437 Level II STM/SEM Infrasctut	Comment no	Date Capt	urer C	mment						
- 37396 New Interlink Trailer for the	1 0	4 Jun 2008 Gerhan	d Roth Test o	omment 01						
# m ACME - Richards Bay (2)										
# ACME - Richards Bay Port (6)										
32930 Blue Print Audits										
- 32862 Green Belt Training Laptops										
 32626 Instrumentation Developme 										
32628 Purchase new lap Top Com										
32723 Repairs to rail along Central										
- 32788 SatelEte phones										

Figure 14 Diary - attachments and comments

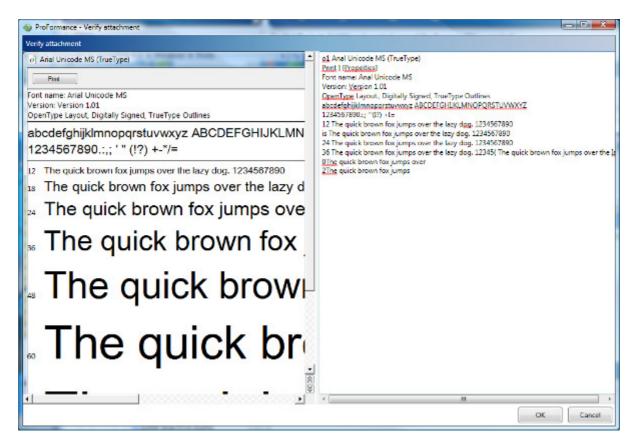


Figure 15 Attachments - optical character recognition

- 4.4.7.1. This document management feature lets you attach any file to items. The attached file is saved in the system's SQL database and may be opened in its native format. These attachments also have version control.
- 4.4.7.2. OCR (Optical Character Recognition) indexes scanned legacy documents making them fully searchable (requires Microsoft Office Document Imaging to be installed on the user's computer).
- 4.4.7.3. The user may also enter project comments which helps ensure continuity when projects are taken over by other specialists as well as providing management with a good idea of the project's status.

4.4.8. Register Items tab

N 🔍 📛	Save 🗑 De	elete 😧 Now	Å	Reise 🐓	Accept	Reject 📶 🛛		
iers	Capital Project: Additional	control pannel	for fur	nace tilting c	ontrol			
olios Programs Ideas Projects Settings	Summary Details Resource	es Schedule F	inancials	Documents	Diary Reg	ister items Report	b	
Dm Demo (2)	Available register items							
	Filters							
# 🚠 ACME - Durban Refinery (19)	* Elinclude sub items							
 37404 Additional control parnel k 37398 Additional scrape bins 37302 Alutrac 	Name Name	0	Status	Date	Due date	Responsible perso	n Capturer	Percentage complete
- 37334 Busbar Insulator Change - 37342 CAST IRON MILLING MACH II - 37376 Dam outlet lining	Deficiency 1		Raised	11 Feb 2009	28 Feb 2009	Marcel Verbiest	Marcel Verbiest	5
 37422 Desktop Replacement 37397 Low dross castwheel 37398 Modification of the 2 sampl 	Bisk (1)	ical unit VA3245				Marcel Verbiett	Marcel Verbiest	
 37305 Che Say 37374 Put barriers around the dan 37425 Redesign the furnace doors 37390 Reduce Instrumentation Est 	Deficiency Register Rem - Ra Register*	sed (37404 Addis				Marcel Verbiest	Marcel Verbiest	30
37329 Reduction L2 - Potroom Gri 37328 Refreshment of MASS Serve	Capturer	And and a second se						
37372 Replacement of Existing Arc		Marcel Verbiest						
37403 Screen for fault finding at th	Number/Code							
37406 To install 12 blocked chute	Name*	Deficiency 1						
37304 Videoconference 37304 Videoconference Morrow casting filter efficiency ACME - Durban wharehouse (6)	Description	Some deficiency						
37405 ABF2 Ducting replacement.	Scheduled stort date	2009/02/01	15	Ad	ual start date	2009/02/09	15	
- 37373 Aquisition of a new LECO 37336 Energy Saving Solar Option	Scheduled finish date	2009/02/28	15	Actu	al finish date		15	
37424 Improvement of Autogenec	Priority*	Medium	(10)	1518			1000	
37437 Level II STM/SEM Infrasctut 37396 New Interlink Trailer for the	Action required	Medium						
# dis ACME - Richards Bay (2)								
# ACME - Richards Bay Port (6)	Responsible person*	Verbiest, Marcel			-	Add New		
- 32990 Blue Print Audits - 32862 Green Belt Training Laptops	Due date				•	NGG New		
32626 Instrumentation Developme		2009/02/28	15					
32618 Purchase new lap Top Com	Percentage complete	5						
32721 Repairs to rail along Central 32788 Satellite phones								

Figure 16 Register items

- 4.4.8.1. Register item categories are configurable and allow a mechanism of tracking items assigned to resources on the project.
- 4.4.8.2. Register items are underpinned by the e-mail notification mechanism meaning that the user will be notified of pending register items which have been raised against him / her. The user may then accept the register item, or reject it, with a rejection reason. The originator will receive notification via a system generated e-mail and the resource will have the register item appear on his / her dash board with the appropriate traffic light status indicator.
- 4.4.8.3. Filters allow the user to filter for register items with the following statuses:
 - 4.4.8.3.1. Accepted
 - 4.4.8.3.2. Completed
 - 4.4.8.3.3. Raised
 - 4.4.8.3.4. Rejected
 - 4.4.8.3.5. None

4.4.9. Reports tab

<u>ଚାର୍ଚ୍ଚ</u>	📥 Aasty			
Filters	Capital Project: Additional contr	ol pannel for furnace tilting	control	
fortfolios Programs Ideas Projects Settings	Summary Details Resources Sc	hedule Financials Document	b Diary Register items Reports	
A	Sample reports	Scope Detail Filters		
ACME - Workfwide Enterprises (2) ACME - Natica (2) ACME - Antica (2) ACME - Durban Refinery (19) ACME - Durban Refiner of MASS Serve ACME - Durban Refinery (19) ACME - Richards By Port (6) ACME - Richards By Port (6)	Activity Reports Activity Reports Activity Activity	Project Type Active Status	(All) Cipen All Stored Popeline Scopad Active Complete Active	

Figure 17 Reports and filters

- 4.4.9.1. ProFormance offers a wide variety of reports which may be filtered to customize the view. All reports are generated in native Microsoft Report Writer format, and can be exported to .pdf format or .xls format so that users may manipulate the raw data.
- 4.4.9.2. Reports filter and roll up according to the selected location or item in the active tree view.
- 4.4.9.3. Dashboard status indicators and reports are useful for the manager, the team leader and the project manager.
 - 4.4.9.3.1. The manager: ProFormance showcases a section specially designed for managers. It contains statistics and reports for multiple projects rolled up into a summary view. The manager then has the ability to drill down as deep as he / she likes to investigate the status of individual projects or portfolios.
 - 4.4.9.3.2. The team leader: Different filter selections provide a view of the status of a portfolio of projects managed by his / her team or area of responsibility, with drill-down capability to investigate problem areas highlighted in specific projects.
 - 4.4.9.3.3. The project manager: Project status and progress is easily tracked and reported.
 - 4.4.9.3.4. ProFormance comes with a variety of bundled reports, and the ability exists to add reports to ProFormance for different clients.



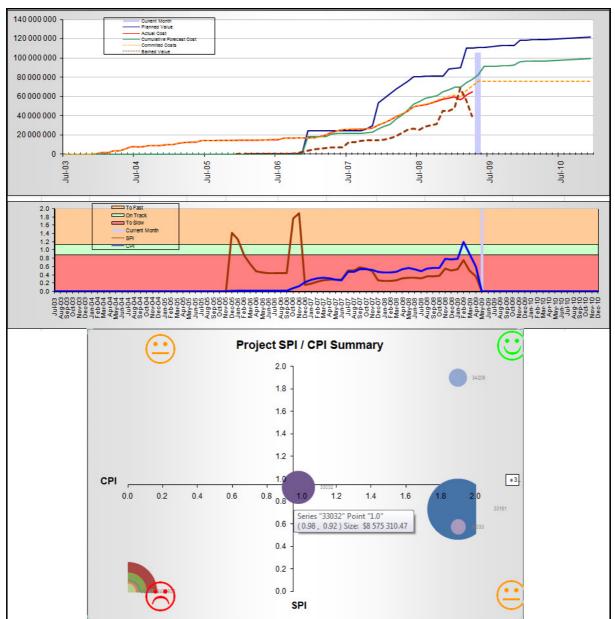


Figure 18 Earned Value reporting

		Filtered fc	or: Location = RBM	Registe	t er Detail Status='None' OR Stat	tus='Raised' OR Stat	us IS NULL)		
Originator	Location	Item Name							
Testing									
Marian Currie		ProFormance	Root						
Improv	ement Task								
Actio	ion Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person	
Conr	duct post implementation	on review of CIP	Raised	22 Jan 2009	13 Feb 2009		30	Curran, Pat	
Driginator	ldea	ltem Name							
ingineering Desi	ign Solutions (EDS)								
Marian Currie	CIP 01	Eng Test 1							
Risk As	ssessment								
Actio	ion Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person	
dfdg			None	14 Jan 2009				Currie, Marian	
Driginator	ldea	item Name							
Furnaces									
Marian Currie	CIP-1-FP	CIP test 1 Mar	/ian						
Improve	ement Task								
Actio	ion Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person	
imple	lement SOP		None	16 Feb 2009	30 Apr 2009			Currie, Marian	
Desc	cription:	ensure item 2 is put ni	into SOP and implem	rented					
Non-co	onformance								
Actio	ion Item		Status	Initiation Date	Target Completion Date	Date Completed	Percentage Complete	Responsible Person	
Rota	ables not conforming		None	17 Feb 2009	30 Apr 2009				
Desc	cription:	aflayn;ahf							
Actic	on Required:	Contact stores and am	range						
Acut									

Figure 19 Register items outstanding

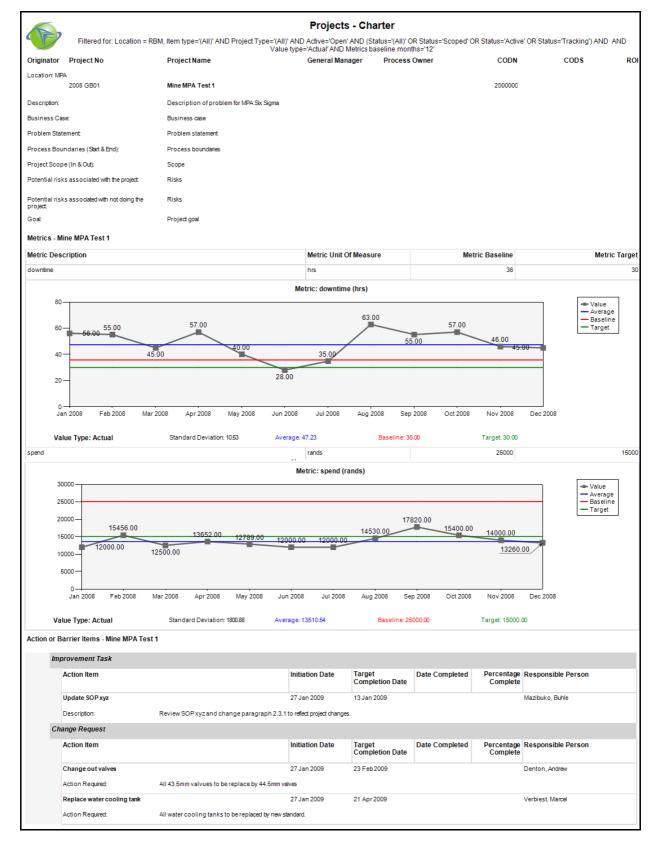


Figure 20 Project charter

E	Filtered for: Location = RBM, Item type='(AII)' AND F	Project Type='(All)' AND Active='Open' AND (Status='(/			
Project No	Project Name	General Manager	Champion	Belt	
ocation: Castl	house department				
1595	New slab moulds for Hydro and large hulets formats				
Ailestones - N	New slab moulds for Hydro and large hulets formats				
Fask Name		Milestone		Due Date	Actual Finish Date
Completed		Completed		05 Jan 2009	
Closed		Closed		09 Feb 2009	
Project No	ProjectName	General Manager	Champion	Belt	
31562 Milestones - \$	house department Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving				
31562 Milestones - \$	Siphon pipe wash bay - Casthouse Metal Receiving	Milestone		Due Date	Actual Finish Date
31562	Siphon pipe wash bay - Casthouse Metal Receiving	Milestone		Due Date 10 Dec 2007	Actual Finish Date
31562 Milestones - S Task Name Started	Siphon pipe wash bay - Casthouse Metal Receiving	Started		10 Dec 2007	Actual Finish Date
31562 Milestones - S Task Name Started Started	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving	Started Started	Champion	10 Dec 2007 10 Dec 2007	
31562 Milestones - 5 Task Name Started Started Project No	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving Project Name	Started	Champion	10 Dec 2007	
31562 Milestones - S Task Name Started Started	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving Project Name	Started Started	Champion	10 Dec 2007 10 Dec 2007	
Milestones - 5 Task Name Started Started Project No Location: Hotsis 33980	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving Project Name Ide Secton	Started Started	Champion	10 Dec 2007 10 Dec 2007	
Milestones - 5 Task Name Started Started Project No Location: Hotsis 33980	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving Project Name de Section Minor abulution facilities for Hotside area of Casthouse	Started Started	Champion	10 Dec 2007 10 Dec 2007	
31562 Milestones - S Task Name Started Started Project No Location: Hotsi 33980 Milestones - N	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving Project Name de Section Minor abulution facilities for Hotside area of Casthouse	Started Started General Manager	Champion	10 Dec 2007 10 Dec 2007 Belt	
31562 Milestones - S Task Name Started Started Project No Location: Hotsi 33980 Milestones - P Task Name	Siphon pipe wash bay - Casthouse Metal Receiving Siphon pipe wash bay - Casthouse Metal Receiving Project Name de Section Minor abulution facilities for Hotside area of Casthouse	Started Started General Manager Milestone	Champion	10 Dec 2007 10 Dec 2007 Belt Due Date	

Figure 21 Milestone exceptions

		Filered	for: Location = REM, (Dates='01-Jan-2009')		
Reward Payment Month	Employee No	Resource Name	Reward Amount	Reward Type	
March 2009	actional literature	Archever, Castle	5000	Annual Cash 10K	
April 2009	000022001	Abdoxi Apt, Rep	200	Voucher	
April 2009	100000011	Arton Illiam	600	Voucher	
April 2009	10000040	Barbs Ban	200	Voucher	
April 2009	and the second s	Bospeen Darra	1000	Monthly Cash 1K	
April 2009		Borgman, Dama	5000	Quarterly Cash SK	
April 2009	transmitt (Bounsen, Danis	200	Voucher	
April 2009	000001104	Constan Dean	200	Voucher	
April 2009	10000000	Cruthlen, Alam	200	Voucher	
April 2009	1000004-00	Curran, Pat	10000	Annual Cash 10K	
April 2009	00000716	Experiment, Name	200	Voucher	
April 2009	100000000	Entertain, Alba	200	Voucher	
April 2009	and the second	Gurrante, Michael	200	Voucher	
April 2009	000021075	Gurrante, Systemit	200	Voucher	
April 2009	100000	Harding, Stan	2500	Quarterly Cash 2.5K	
April 2009	100000	Handing, Stan	400	Voucher	
April 2009		Jacobs, Johan	200	Voucher	
April 2009		Losse Jan	200	Voucher	
April 2009	10001-0002	Munit Expres	200	Voucher	
April 2009	1001102	Wegati, Johns	200	Voucher	
April 2009	100012104	Nparca Justiced	200	Voucher	
April 2009	INCOME.	Harman Borgan	200	Voucher	
April 2008	10000710	Goothuccen, Tasan	200	Voucher	
April 2009	00001798	Patchaga, Koren	200	Voucher	
April 2009	100001778	Schoolage, Sty-	200	Voucher	

Figure 22 Resource rewards

5. ProFormance web interface

🖉 ProFormance We	b - Windows Internet E	xplorer	1000			A STATE OF THE OWNER OF	
G	ttp://localhost:52800/PE	8Web/Idea/List.aspx			•	← X Live Search	۶.
🙀 🏟 🌈 Pro	Formance Web					👌 • 📾 • 🖶 • 🔂	ege 🔹 🍈 T <u>o</u> ols 🔹 🐃
	Formance N Register Items 📳		: Marcel Verb	iest			Î
Ideas							
List Items							1
Captured against	▼ ▲ ACME - ▼ ▲ ACM ▶ ▲ A ▶ ▲ A	IE - Durban ACME - Durban Refine ACME - Durban whare IE - Richards Bay				E	E
Status	Registered 🛛 Ac	tive 🔳 Complete 🔳	Withdrawn 🗉	On Hold			
Date	01/11/2008	to					
New Idea	Apply Filter						
Location Select ACME - Richards B	Innovation Register	s Date Tean red 11 Feb 2009 Greer	n <mark>Originator</mark> Verbiest, Marcel	Coach Verbiest, Marcel	Manager Verbiest, C Marcel	Short description Improve harbour material import distribution	Attachmen *
* [
Done					🗣 Local intra	anet Protected Mode: On	🔍 100% 👻

Figure 23 Web interface for non ProFormance users

- 5.1. The web interface is available to all persons on a site / location, not just ProFormance users.
- 5.2. The web interface allows for the following functionality:
 - 5.2.1. Idea / innovations capture.
 - 5.2.1.1. Users can capture ideas or innovations which will be assigned to the selected coaches / facilitators that are users in ProFormance. The selected user will also be notified via email.
 - 5.2.1.2. When these users open ProFormance, the ideas will be on their dashboard, and further action can be taken, e.g. reject the idea, create a project from the idea or manage the idea as a "team fix" instead of a full blown project.
 - 5.2.2. Register items capture
 - 5.2.2.1. Users can capture register items (deficiencies, punch lists, risks, etc.) which will be assigned to the selected responsible persons that are users in ProFormance. The selected user will also be notified via email.

5.2.2.2. When these users open ProFormance, the register items will be on their dashboard, and further action can be taken, e.g. reject the item; re-assign the item or action the item.

5.2.3. Basic reports

5.2.3.1. There are basic reports available to all persons with access to the web interface, regardless if they are users in ProFormance or not.