MaxTeam Feature List

Configuration, Setting Up Core Data

Feature	Notes
Set up an unlimited number of user defined fields to support project unique data views and reporting requirements	Quickly create codes and fields to match business and project specific needs. Define text, codes, flags, Boolean, and date fields that can be added to the time phased cost view, resource structures, and other structures. User defined fields automatically show up as parameters in reporting.
Import from anywhere using MS Excel	Quickly create common core data such as calendars, rates, resource lists, code structures, and code lists using source data from other systems. Project teams can import the current approved rates from accounting system as needed.
Establish standard accounting calendar templates	Create it once and project teams can use it to quickly set up a new project and tailor the base calendar to fit their needs.
Define project specific reporting calendars as well as resource calendars	Project teams can tailor calendar periods to match project specific needs. They can set up common reporting calendars for quarterly or annual cost management reports.
Establish a standard rate template and rate calculations with ability to create custom expressions	Create it once and project teams can use it to quickly set up a new project and tailor the rate structure to meet their needs.
Build complex rate structures, add effective dates with escalation	Use the rate structures to build cost rules into labor categories or resources to determine the calculated results from user entered values such as labor hours, material quantities, or material cost.
Create unlimited number of rate structures for different cost types (budget, forecast) with effective dates	Project teams can maintain rate structures for different cost types as approved direct and indirect rates change over the duration of the project.
Establish a standard hierarchical resource structure template	Create it once and project teams can use it to quickly set up a new project and tailor the set of resources to meet their needs.
Assign resource roles to the project specific resources	Establish a common set of resource roles to enable cross-project analysis of resource capacity and demand.
Establish a standard base project configuration	Create and maintain a new project template project teams can use to quickly set up a new project. Establishing a base configuration can help to ensure projects include required codes to produce reports across projects. Provides a foundation to increase consistency and create repeatable processes.
Define project specific bookings or funding profiles, revenue calculations, and payment terms	Enables other project specific or cross-project cash flow analysis, revenue forecasting, and revenue to target analysis.
Create document templates	Create rich text templates for common documentation project teams can include with the cost data such as basis of estimate rationale, assumptions, or risks. These templates help to establish a repeatable process for the project teams.

Feature	Notes
Project level security	Users are set up and configured, and then associated with security roles. This determines which projects users have access to and what they can do within those projects.

Planning

Feature	Notes
Build WBS structures	Create it manually, import it from an Excel file, or import it from common scheduling tools such as Oracle Primavera P6 and Microsoft Project. MaxTeam uses the structure to automatically create the hierarchical grid view ready for entering time phased budget or forecast data.
Identify WBS attributes	Add user defined fields to the WBS for sorting or filtering the data for different data views, role-based views, or reporting.
Import, parse, and map statement of work (SOW) requirements	Provided the SOW is a structured document, MaxTeam can parse the SOW paragraphs into a code structure the project team can use to map the SOW to the WBS elements. Eliminates time spent copying and pasting the SOW paragraphs.
Identify control accounts at any level within the WBS, control accounts can be at different levels for different legs of the WBS	Project teams can easily identify the control account levels within the WBS to match project control requirements. Facilitates identifying responsibility assignments regardless of the project organization structure approach, reporting, and managing changes.
Identify summary level planning packages and control account planning packages	Project teams can take advantage of rolling wave planning techniques.

Budgeting

Feature	Notes
Central database for project teams to collaborate and share the cost data	MaxTeam provides a single database for the entire project team to create and maintain their time phased cost data as well as enter rich text documentation all in one place. The team can view the complete set of cost data and documentation – the single authoritative source for the data.
Budget locking	Lock the budget at specific levels to work exclusively on a specific WBS element or the entire set of time phased data. Other users can still view data while locked.
Easy to use grid view similar to Excel to enter data with built-in hierarchical structure to view the data at summary, intermediate, and detail levels	Project personnel can quickly enter or view their data using a familiar user interface. They can collapse or expand the WBS hierarchy as needed, change the order of the columns, hide or show columns, or sort and filter the data in the grid view just like they do in Excel. Project teams can also create role-based views to fit management needs.
Enter budget in hours, full time equivalents (FTEs), or direct cost and select the rate structure to apply direct and indirect rates	Budget in hours and MaxTeam calculates the FTE numbers and direct cost. Budget in FTE and MaxTeam calculates hours and direct costs. The assigned rate structure automatically calculates the applicable indirect costs to determine total costs.

Feature	Notes
	Teams can assign different rate structures for the different cost types (budget, forecast).
Create hierarchical bills of material and assign material categories	Makes it easy for the project team to maintain bills of material (BOMs) to substantiate the budget material values, identify material categories, and differentiate between high value/low value material or critical/non-critical material. The team can easily import the bills of material from the M/ERP system to maintain the BOMs through the life of the project (as estimated, as planned, as modified). Also means the project team can easily calculate material price and usage metrics within MaxTeam.
Copy the proposal cost estimate data as the basis to create the time phased budget data	The proposal team can easily handoff the proposal cost estimate developed in BOEMax to the project team at contract award. The project team can update the budget details in BOEMax to establish the master copy of the time phased budget baseline. Using MaxTeam, they simply copy the project from BOEMax into MaxTeam so the project is ready for the execution phase. No need to go through the process of creating all the core data again for the execution phase.
Oracle Primavera P6 or Microsoft Project Integration	Ensures the time phased budget data are always in alignment with the resource loaded activity data. Eliminates common disconnects between the schedule and cost data. Project teams can map the fields in the schedule tool to the fields required for the cost data such as the WBS, control account, work package, charge code, or other user defined codes.
Supports standard earned value techniques	These are assigned at the work package level. Includes 0/100, 100/0, 50/50, user defined, percent complete, earning rules, milestones, level of effort (LOE), and apportioned effort.
Define an unlimited number of additional budget cost codes	Helps the project team track different categories of budget that are included or excluded from the total cost values (budget at completion).
Rich text documentation and reporting, content management and document management	Create documents with or without templates. This could include information such as the SOW, basis of estimate rationale, assumptions, or risks. MaxTeam includes the documentation with the cost data. Project personnel determine the level of detail where they want to enter their rich text documentation.
Create custom budget distribution spreads and learning curves	Helps project teams create time phased budget distributions that align with how the work will be performed for more accurate performance assessments each reporting period.
Supports rolling wave planning	BOEMax and MaxTeam share the built-in workflow process to manage routine rolling wave planning changes. Project teams can model converting the planning packages into work packages in BOEMax first and then merge the approved changes into MaxTeam. The workflow process records all of the detail transactions that occur to maintain a historical archive of the changes for the duration of the project.

Measuring Performance

Feature	Notes
Import schedule activity status as the basis for the work package earned value claimed	Eliminates common disconnects between the schedule and cost data.
Import actual costs from the accounting system on a weekly and monthly basis	Easily import actual costs from the accounting system. Project teams can establish an actual cost import template to simplify the weekly or monthly import process.
Enter and maintain estimated actuals as well as generate a log of transactions	Project teams can define additional cost codes to enter, track, and replace estimated actual values when the actual costs are recorded in the accounting system.

Analyzing Performance

Feature	Notes
Set variance thresholds, both value and percent, at any level in the WBS or at different levels for different legs of the WBS	Thresholds are a means to identify what is considered to be a significant variance for further root cause and impact analysis. Project teams set the thresholds to reflect internal management needs or to support contractual requirements.
Built-in cost data validation analysis view and report to identify common data anomalies	Helps project teams quickly identify and resolve common data errors such as earned value and no actual costs, actual costs and no earned value, or cumulative actual costs are greater than the forecast at completion.
Enter forecast in hours, full time equivalents (FTEs), or direct cost and select the rate structure to apply direct and indirect rates	As for the budget values, forecast in hours and MaxTeam calculates the FTE numbers and direct cost. Estimate in FTE and MaxTeam calculates hours and direct costs. The assigned rate structure automatically calculates the applicable indirect costs to determine total costs. Teams can assign different rate structures for the forecast values.
Import resource loaded activity data from scheduling system to produce the time phased forecast data	As for the time phased budget data, ensures the time phased forecast data are always in alignment with the resource loaded activity data for the remaining work. Eliminates common disconnects between the schedule and cost data.
Forecast locking	Lock the forecast at specific levels to work exclusively on a specific WBS element or the entire set of time phased data. Other users can still view data while locked.
Ability to enter or calculate an unlimited range of forecasts at completion	Project teams can use the set of standard independent forecasts at completion calculations or create their own to assess the credibility of the forecast at completion.
Calculates standard earned value metrics	The project team can easily review performance metrics in the time phased grid view at the detail level or any level of the WBS hierarchy. Facilitates the ability to drill down into the data to identify work elements that require additional attention.

Reporting

Feature	Notes
Pivot table and ad hoc reports, easy to use report wizard	Create reports at will to address business or analysis needs. These reports are easy to configure and once they are created, they can be saved as a reusable template.
Built-in standard reports such as the responsibility assignment matrix and control account plan	As an option, project teams can quickly produce common earned value management reports.
Built-in standard line charts and graphs, dashboard view for performance metrics and variances	Project teams can quickly produce common earned value metric line charts and graphs at any level of the WBS hierarchy. MaxBoard provides a built-in dashboard view the project manager or others can use to drill down into the data to identify work elements that require additional attention.
Built-in standard and Integrated Program Management Report (IPMR) Data Item Description (DID) performance report formats (1 to 5)	When needed, project teams can quickly produce the formal performance reports identified as deliverables in a Contract Data Requirements List (CDRL).
Built-in data export that complies with the IPMR DID UN/CEFACT XML (formats 1 to 5 and 7) and JSON data encoding requirements	Easily produce the required performance reporting electronic deliverables for government customers.
Rate reports by element of cost categories	Create labor category and subcontractor rate reports by period and show indirect rates as necessary.
Combine time phased data and documentation in one report	Produce a variety of reports using the data structures such as the WBS as the framework for the time phased cost data and include the desired rich text documentation.
Single project and cross-project reporting	Define project groups to produce a variety of reports or dashboard views for additional analysis. For example, group projects by product line, business unit, customers, or the entire company. Use the report wizard to create reporting templates for corporate and financial users. Or, use MaxBoard, an interactive dashboard, to produce corporate data views to proactively manage cash flow, revenue, or resource demands for pending new contracts and existing projects.

Workflow, Managing Changes

Feature	Notes
Built-in workflow process	The project manager can create a framework to define project control roles, establish standard forms, route forms for approval, track where things are in the approval process, and verify an approved change was merged into the budget data. The entire project team has complete visibility into where things are in the change control process. They use the built-in workflow functions to manage work authorizations and baseline change requests.

Feature	Notes
Establish standard workflow forms	Implement standard forms to ensure project teams include the expected basis of estimate, work authorization, and baseline change request content. These forms include a summary page for approval signatures along with the detail time phased data automatically populated from the BOEMax or MaxTeam database.
Define workflow user roles	Project managers can use the workflow process to help them define the project control team roles and responsibilities. They can then assign the roles to specific team members.
Establish workflow routing rules and workflow queues with electronic signature signoff	Project managers can set up the routing rules or handoffs between project control roles. They can route specific work elements to a team member to model a baseline change request and then route the request through various approval levels. This reduces processing time because each person knows what is in their work queue and who is responsible for what.
Transaction audit trail and versioning	The detail level changes are automatically captured in the database. The entire project team has a complete audit trail of changes and can trace who did what to the data for full transparency. BOEMax and MaxTeam share the built-in workflow process to manage changes. With the master copy of the baseline data in BOEMax, the project team has the foundation to accurately maintain a historical record of all baseline changes.
Do what-if analysis and create different forecast scenarios as the basis for a baseline change request separate from the performance measurement baseline	Project teams can use BOEMax to model the proposed change to assess the impact to other control accounts or the entire project. The changes are only merged into the budget baseline in MaxTeam once the work authorization has been updated and approved and the baseline change request has been approved.
Include change rationale and impact analysis documentation as part of the baseline change request	Project teams can include the documentation explaining the reason for the change and discuss any impact to other control accounts along with the updates to the detailed time phased cost data – everything they need is in one database. This eliminates a common problem where the substantiation for the change request is missing.