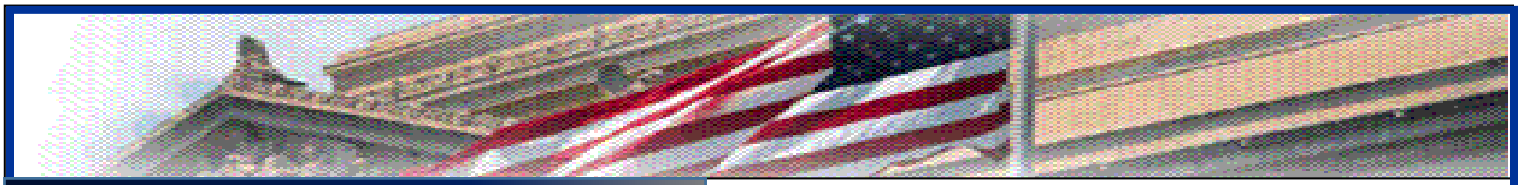

bluecrane

Management Consulting

for

State and Local

Governments

Quality Assurance

Executive Advisement

Project Oversight

Project Management

Independent Verification and Validation (IV&V)

Risk Reduction

Quality Assurance Report

for the

State of Washington

Administrative Office of the Courts (AOC)

CLJ-CMS Project

September 30, 2016

Prepared by

Bluecrane, Inc.

bluecrane ®

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Part 1: Executive Dashboard

Introduction

This report provides the September 2016 quality assurance (QA) assessment by Bluecrane, Inc. ("*bluecrane*") for the State of Washington Administrative Office of the Courts (AOC) Courts of Limited Jurisdiction – Case Management System (CLJ-CMS) Project.

Executive Summary

The primary focus of the project at this time is the procurement for the CLJ-CMS software vendor, which is progressing smoothly. Other areas of the project are in planning stages or are underway. The project got early starts in several areas, including organizational change management activities, establishing the Court User Workgroup (CUWG), and developing a set of future-state business processes.

Although we have not identified any risks to the overall project scope, schedule, or budget, we have highlighted several areas that bear monitoring due to the critical dependence required for a successful project.

Vendor Procurement	Urgency: N/A	Status: Monitor	July	Sept	Nov
			N	N	

Procurement for the CLJ-CMS software vendor is underway. The Request for Proposals (RFP) was approved by the CLJ-CMS Steering Committee and Judicial Information System Committee (JISC) in August and released on August 26. Planning is underway for the evaluations that are scheduled for December and demonstrations by top-ranked vendors in February.

For detailed assessment, see: #Procurement

Solution Integrations	Urgency: N/A	Status: Monitor	July	Sept	Nov
			N	N	

State-level data and system integration will be provided through the AOC Enterprise Data Repository (EDR) that is currently under development. The EDR is planned for implementation in mid-2017 by the Expedited Data Exchange (EDE) project. The CLJ-CMS Project's reliance on the EDR establishes a very heavy dependency on the success of the EDE project. We recommend that the CLJ-CMS Project team stay in close touch with the EDE project to monitor progress and participate in testing activities.

For detailed assessment, see: #Integration

Staffing	Urgency: N/A	Status: Monitor	July	Sept	Nov
			N	N	

The project has adequate resources to complete the procurement phase. Additional technical resources will be on-boarded starting in January.

Legend

N	No Risk Identified	R	Risk	X	Extreme Risk	A	Risk Being Addressed

Implementation of CLJ-CMS will require sharing the limited AOC, vendor, and local court and probation resources that are knowledgeable and proficient in the new system functionality. Setting expectations with local courts for the level of support they can expect for rollout and operational support of both the new and legacy systems will help smooth the transition.

For detailed assessment, see: #Staffing

Stakeholder Engagement / Organizational Change Management	Urgency: N/A	Status: Monitor	July	Sept	Nov
			N	N	

Organizational Change Management (OCM) activities are underway with project information being disseminated through association meetings and other events, Washington court websites, and awareness surveys.

The CLJ-CMS Project has a large number of stakeholders dispersed throughout the state. The engagement of these dispersed stakeholders requires an emphasis on project activities to ensure that stakeholders are informed, have their concerns addressed, and have their expectations set appropriately. Two-way communication is exceedingly important in gaging the effectiveness of communications. OCM strategies cannot be effectively implemented without sufficient resources to perform the work.

For detailed assessment, see: #OCM

Part 2: Detailed Assessment Report

Project Management and Sponsorship

Category	Project Management and Sponsorship	July	Sept	Nov
Area of Assessment	Governance	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The implementation of the CLJ-CMS project involves and impacts many stakeholders at the courts, AOC, and other state agencies. The structure of the project presents a challenge to the efficient and effective decision-making that will be needed to keep the project progressing successfully through the implementation.

Project governance is defined in the Project Charter and is being executed effectively by the Project Leadership, Executive Sponsors, Steering Committee, and JISC.

Business functionality governance is achieved through the Court User Workgroup.

To return to Executive Dashboard, click: #ExecDashboard

Category	Project Management and Sponsorship	July	Sept	Nov
Area of Assessment	Scope	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: Effective management of scope is critical to the success of the project in meeting schedule and budget constraints. A “baseline” for scope is established prior to the start of contract negotiations and then managed using the project change control and governance processes through the life of the project. Project scope is reviewed and communicated frequently during the project through the organizational change management process. These activities will help to ensure that stakeholders understand the scope of the project and are involved in changes to scope at appropriate levels of the organization.

The scope of the CLJ-CMS project is established in the system vendor RFP requirements and includes the deliverables defined in the Statement of Work (SOW). It is possible that the scope will be modified during the fit-gap analysis when the requirements are validated by the selected system vendor, AOC, and the CUWG. Scope will be managed through the Requirements Traceability Matrix, system vendor contract deliverables, and the Project Change Management process.

Modifications to project scope can impact the project schedule and budget. Project scope can be increased through the addition of requirements or by expansion of project activities. As the requirements are further defined during the fit-gap activity, there may be discoveries that result in the need for additional scope that was not identified in the RFP requirements, or there may be refinements of requirements that result in the expansion of work activities that impact the schedule or budget.

It may be necessary to modify the scope of implementation activities if project resources allocated to the project are limited due to budget constraints.

To return to Executive Dashboard, click: #ExecDashboard

Category	Project Management and Sponsorship	July	Sept	Nov
Area of Assessment	Schedule	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The procurement phase is currently on schedule. The project team is beginning to plan timelines for subsequent phases of the project, but the full project schedule will not be baselined until the vendor contract is executed and a project schedule has been developed collaboratively by the system vendor and project team and approved by the Steering Committee. System bidders have been asked to provide a detailed schedule with their RFP proposal submission.

Recommendation: As project timelines are refined, schedule contingency time should be allocated to mitigate the risk of unforeseen complexities, staff changes, or imprecise estimates of effort. Schedule contingency can be allocated to individual tasks, intermediate milestones, or at the overall schedule level. Explicit schedule contingency is easier to track as it is consumed. The percentage of schedule contingency should be based on the level of confidence in the estimates for the individual tasks as affected by factors such as the experience of the estimators, whether or not the resources are 100% allocated to project activities or will also be providing operational support, familiarity with the technology, familiarity with business processes, interdependencies, etc.

If the schedule has no contingency to consume and activities require more time than planned, there may be a tendency to reduce time allotted to activities near the end of the configuration phase, including testing and training, to avoid extending the date for pilot Go-Live. If time is reduced for critical activities, the quality of the implementation can be compromised.

To return to Executive Dashboard, click: #ExecDashboard

Category	Project Management and Sponsorship	July	Sept	Nov
Area of Assessment	Budget	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: An initial budget for the project has been allocated. The budget may be revised based on the executed system vendor contract.

To return to Executive Dashboard, click: #ExecDashboard

Category	Project Management and Sponsorship	July	Sept	Nov
Area of Assessment	PMO: Change, Risk, Issue, Quality Management	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The project team is beginning to establish processes to manage and track the project. Project communications are occurring at regularly scheduled project team, sponsor, and steering committee meetings.

It is important that the quality of project deliverables be considered when estimating effort and resources required to complete the deliverables. Stakeholders at all levels should consider the impact to the success of the project if quality is compromised to meet previously identified milestones. The effect of quality on the success of the project will be most apparent in the areas of requirements, organizational change management, testing, and integrations.

Recommendation: As identified in the Project Schedule area, an evaluation should be performed in all areas of the project to ensure that estimates of effort and resources remain accurate and include sufficient contingency to allow for discoveries that will occur in the upcoming phases. Project stakeholders should support the project's evaluation of effort and time required to produce quality deliverables and results.

To return to Executive Dashboard, click: #ExecDashboard

People

Category	People	July	Sept	Nov
Area of Assessment	Staffing	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The project has adequate resources to complete the procurement phase. Based on lessons learned from the SC-CMS project, CLJ-CMS resources were allocated early in the project to perform business analysis, technical analysis, and organizational change management. These project resources are being utilized to support the procurement of the CLJ-CMS vendor as well as beginning preparations for upcoming phases of the project. Additionally, planning is underway to determine the resource needs and timing for the remainder of the project to ensure adequate funding and allocation of resources when needed. Areas under consideration include business analysis, conversion, training, deployment, and operational support.

Recommendation: *bluecrane* agrees with the project's approach to conduct early planning for resource requirements through the duration of the project. Lack of sufficient resources continues to be an issue with the SC-CMS project as they attempt to facilitate and complete the implementation readiness activities for upcoming courts and, ***at the same time,*** provide adequate support to the courts where the system has been implemented. Implementation requires sharing the limited AOC, vendor, and local court and probation resources that are knowledgeable and proficient in the new system functionality. This resource "bubble" of demand for support and operational resources will eventually subside as court personnel increase their knowledge and skills in the use of the new system and as AOC and local court resources are redirected from support of legacy systems to support of the new system. However, setting expectations with local courts for the level of support they can expect for rollout and operational support of both the new and legacy systems will help smooth the transition.

Status: As identified in the project staffing plan, additional resources are planned to be added to the project starting in January. The additions will be primarily technical resources.

To return to Executive Dashboard, click: #ExecDashboard

Category	People	July	Sept	Nov
Area of Assessment	Stakeholder Engagement / Organizational Change Management	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: Organizational Change Management (OCM) activities are underway with project information being disseminated through association meetings and other events, Washington court websites, and awareness surveys. The OCM lead has formed a sub-team with participants from the CLJ-CMS project and from other business and information technology support areas at AOC. OCM requirements have been identified in the vendor RFP and include requirements for vendor support and involvement in OCM activities.

Note that we differentiate between four types of stakeholder engagement communications that occur during a system implementation: stakeholder relationship management, organizational change management, project communications, and transition management.

1. **Stakeholder relationship management** communication activities are aimed at ensuring support and positive involvement of stakeholders who have the ability to influence the success of the project.
2. **Organizational change management** communication activities focus on change within the social infrastructure of the workplace to support new ways of doing work and overcome resistance to change by setting expectations with regards to specific changes to the workplace.
3. **Project communications** are used to inform executives, sponsors, business management, interface partners, and other stakeholders of project progress, accomplishments, planned activities, risks, and issues.
4. **Transition management** communications provide stakeholders with information about the product and changes to operations primarily through training.

This section of the report focuses on the first two areas of stakeholder relationship management and organizational change management. Project communications are assessed in the PMO Processes section and transition management is assessed in the Training and Rollout, User Support, and Operations sections.

Recommendation: Effective organizational change management and stakeholder relationship management are key to successful implementation of any project. These areas are especially critical in this project due to the need to implement standardized processes across the state and the large number of stakeholders dispersed throughout the state. The engagement of these dispersed stakeholders requires an emphasis on project activities to ensure that stakeholders are informed of project progress, are aware of short-term and long-term impacts to business processes, have their concerns solicited and addressed through the life of the project, and have their expectations set as to the functionality that will and *will not* be available in the system.

bluecrane agrees with the approach taken by the OCM team in assessing stakeholder groups on a regular basis to monitor their level of involvement and support of the project and how court staff are moving along the Change Acceptance Curve through awareness and understanding. Two-way communication is exceedingly important in gauging the effectiveness of communications.

bluecrane also agrees with the approach to have the system vendor provide resources to support OCM activities. Although OCM is primarily an activity that should be driven by AOC and court business leaders, OCM strategies cannot be effectively implemented without sufficient resources to perform the work.

To return to Executive Dashboard, click: #ExecDashboard

Category	People	July	Sept	Nov
Area of Assessment	Training	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: Planning for system training has begun, including consideration of the involvement of system vendor in providing training, the timing of training, and configuration of the system training environment. Training requirements have been specified in the RFP.

Training for evaluators who will score the vendor RFP proposals is being planned as well.

To return to Executive Dashboard, click: #ExecDashboard

Category	People	July	Sept	Nov
Area of Assessment	Rollout, User Support, and Operations	No Risk Identified	No Risk Identified	
Urgency	N/A			

The project team has begun implementation planning with respect to the timing and resource requirements for court preparation, conversion, training, Go-Live events, and transition to operations. Due to the large number of courts to be moved to the new system (300+), consideration is being given to the best approach that will result in quality implementations in the least amount of time. Alternatives include 1) beginning the pilot implementation with one or more of the larger courts to quickly begin building a reserve of court staff that will assist with implementations in other courts or 2) starting small to gain experience with smaller courts first. Bidders have been asked to propose a rollout strategy in their response to the system implementation RFP.

To return to Executive Dashboard, click: #ExecDashboard

Category	People	July	Sept	Nov
Area of Assessment	Contract and Deliverables Management	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The draft system vendor contract has been completed and included in the RFP. Development of the draft contract was a collaborative effort by the AOC Contracts Office, CLJ-CMS stakeholders, and the State Attorney General's Office.

To return to Executive Dashboard, click: #ExecDashboard

Solution

Category	Solution	July	Sept	Nov
Area of Assessment	Vendor Procurement	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The procurement for the CLJ-CMS software vendor is progressing smoothly. The development of the RFP was approved by the CLJ-CMS Steering Committee and Judicial Information System Committee (JISC) in August and released on August 26. A pre-proposal conference was conducted in mid-September. Vendor questions were received in late September and responses will be provided in early October. Planning is underway for the evaluations that are scheduled for December and demonstrations by top-ranked vendors in February.

Recommendation: Expectations should be set with evaluators and alternate evaluators as to the time commitment required to perform a quality evaluation of the RFP vendor proposals. Evaluators will be expected to attend evaluator training, perform the evaluations, attend vendor demonstrations, and deliberate on vendor selection.

To return to Executive Dashboard, click: #ExecDashboard

Category	Solution	July	Sept	Nov
Area of Assessment	Business Processes / System Functionality	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The CBO got an early start on defining the CLJ business processes that will be used as a basis for deriving the requirements for system functionality to support the processes. The CLJ-CMS CUWG was formed to represent the business interests of the CLJ courts and engaged to develop a set of future-state business processes. The CBO worked with CUWG members to identify and address problems that courts are currently experiencing with the legacy system and their existing business processes.

Recommendation: *bluecrane* agrees with the approach taken by the CBO to work with the CLJ CUWG, Steering Committee, and court stakeholders to standardize business processes as much as possible across the state to align with core system functionality of the selected Commercial Off-the-Shelf system. Standardized business processes will reduce cost and complexity of both the short-term project implementation and long-term operational support of the business processes and supporting system functionality. We highly recommend that, where possible, courts modify their business processes to align with the standardized processes.

A second recommendation is to identify as early as possible any local systems that have been implemented in the courts or any systems planned for implementation that have duplicative functionality with the derived requirements. It is important to understand the mapping of these ancillary systems to CLJ-CMS requirements to determine an approach for providing similar functionality in the new system and decommissioning the local legacy systems.

To return to Executive Dashboard, click: #ExecDashboard

Category	Solution	July	Sept	Nov
Area of Assessment	Solution Requirements, Design, and Configuration	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: Requirements for information system implementation projects are typically divided into those required to support business processes and those to support the technical needs. Both types of requirements have been identified in the RFP, being further divided into mandatory and desirable requirements. The business requirements were developed by the CBO in conjunction with the CUWG. The CBO focused on deriving the approximately 1,500 requirements based on future-state business processes that were developed by addressing problems that courts are currently experiencing. A requirements traceability matrix is being maintained to log changes to the requirements including the reason for each change. Using lessons learned from the SC-CMS project, the requirements development was begun well in advance of the development of the RFP. It is expected that not all identified business requirements will be implemented due to budget constraints. This expectation has been communicated to the CUWG and Steering Committee.

Technical requirements have been identified in the RFP as well, including browser, security, and performance requirements. The technical requirements are based on information technology best practices and were derived using input from the AOC technical SMEs, technical requirements from the SC-CMS RFP, and lessons learned from the SC-CMS project.

Recommendation: *bluecrane* agrees with the approach taken by the project to drive towards limiting the amount of software customizations and modifications in the configuration of the system for local court implementations. Software customizations are problematic long-term due to the need for ongoing testing and modifications necessary to keep system customizations in synch with new versions of the core system as they are released. Variances in local configurations increase the implementation resources and timeframe for each court, and are difficult and expensive to support long-term. In nearly all cases, a less expensive and less troublesome approach is for courts to make the often minor modifications to their business processes to align with the core system functionality.

To return to Executive Dashboard, click: #ExecDashboard

Category	Solution	July	Sept	Nov
Area of Assessment	**Software Integrations**	**No Risk Identified**	**No Risk Identified**	
Urgency	**N/A**			

Observation: There are two levels of integrations between CLJ-CMS and other computer systems. State-level integrations will provide the transfer of information between CLJ-CMS and other state systems, including those at AOC and other state agencies such as the Department of Corrections and State Patrol. The systems at AOC include the Judicial Information System (JIS) that provides access to case information across the state. The second type of integrations are local court integrations that will provide the transfer of information between CLJ-CMS and local court and city information systems.

State-level integration will be provided through the AOC Enterprise Data Repository (EDR), which is currently under development. The EDR is planned for implementation in mid-2017 by the Expedited Data Exchange (EDE) project. King County District Court will be the first court supported by the EDR as part of the independent King County case management system implementation. If the EDR is not implemented in time for the first CLJ-CMS court, then the CLJ-CMS project would have to either (1) delay the first court implementation until the EDR is completed or (2) build separate integrations using completed components of the EDR to support the CLJ-CMS courts.

The CLJ-CMS project's reliance on the EDR establishes a very heavy dependency on the success of the EDE project. A similar dependency existed between the SC-CMS project and the Information Networking Hub (INH) project. While the INH project was completed in time for the SC-CMS pilot, there was not sufficient time for testing, which has resulted in continuing integration-related problems for the SC-CMS rollout. At this time, we simply provide an observation that the dependency between the two projects is significant, but we are not raising a risk.

Recommendation: We recommend that one or more members of the CLJ-CMS project team attend EDE project meetings to stay informed on project progress, issues, and risks. We also recommend that the CLJ-CMS project be involved in EDR testing as early as possible to reduce the possibility of integration problems during and following pilot.

To return to Executive Dashboard, click: #ExecDashboard

Category	Solution	July	Sept	Nov
Area of Assessment	**Information Retrieval and Reporting**	**No Risk Identified**	**No Risk Identified**	
Urgency	**N/A**			

Observation: The business requirements identified in the CLJ-CMS RFP include requirements for reporting and on-line access to party and case information. As part of the implementation, the project will conduct an analysis to determine legacy system reports that can be replaced by reports that come standard with the new system and those legacy reports that will require new reports to be developed using a report development tool.

To return to Executive Dashboard, click: #ExecDashboard

Data

Category	Data	July	Sept	Nov
Area of Assessment	Data Preparation	No Risk Identified	No Risk Identified	
Urgency	N/A			

Observation: The project team has an early start on communicating to courts the need to resolve data inaccuracies in the legacy systems on an on-going operational basis prior to conversion of their data to the new system. Data profiling reports are being provided to courts to identify data anomalies in the Judicial Information System (JIS). The preparation of data for conversion is typically a long, tedious activity that should be started as early as possible since the local court and probation resources that are allocated to data clean-up also have daily operations responsibilities.

If local courts do not allocate sufficient resources to data preparation activities, data problems will be transferred to the new system. Data quality issues may affect synchronization processes, which could indirectly (or directly) impact court operations.

Recommendation: *bluecrane* agrees with the approach being taken by the project to encourage courts to review data quality reports and resolve noted data problems as part of their normal on-going operational processes.

To return to Executive Dashboard, click: #ExecDashboard

Category	Data	July	Sept	Nov
Area of Assessment	Data Conversion	Not Assessed	Not Assessed	
Urgency	N/A			

This area will be assessed later in the project.

To return to Executive Dashboard, click: #ExecDashboard

Infrastructure

Category	Infrastructure	July	Sept	Nov
Area of Assessment	Statewide Infrastructure	Not Assessed	Not Assessed	
Urgency	N/A			

This area will be assessed later in the project.

To return to Executive Dashboard, click: #ExecDashboard

Category	Infrastructure	July	Sept	Nov
Area of Assessment	Local Infrastructure	Not Assessed	Not Assessed	
Urgency	N/A			

This area will be assessed later in the project.

To return to Executive Dashboard, click: #ExecDashboard

Part 3: Review of *bluecrane* Approach

We began our Quality Assurance engagement for the AOC CLJ-CMS project by developing an understanding of the project at a macro level. We started by analyzing the following five "Project Areas":

- ***Project Management and Sponsorship***
- ***People***
- ***Solution***
- ***Data***
- ***Infrastructure***

It is not our practice to duplicate Project Management activities by following and analyzing each task and each deliverable that our clients are tracking in their project management software (such as Microsoft Project). Rather, we identify those groups of tasks and deliverables that are key "signposts" in the project. While there are numerous tasks that may slip a few days or even weeks, get rescheduled, and not have a major impact on the project, there are always a number of significant "task groups" and deliverables that should be tracked over time because any risk to those items–in terms of schedule, scope, or cost–have a potentially significant impact on project success.

We de-compose the five Project Areas listed above into the next lower level of our assessment taxonomy. We refer to this next lower level as the "area of assessment" level. The list of areas of assessment grows over the life of the project. The following list is provided as an example of typical areas of assessment:

- ***Project Management and Sponsorship***
    - Governance
    - Scope
    - Schedule
    - Budget
    - PMO: Change, Risk, Issue, Quality Management
- ***People***
    - Staffing
    - Stakeholder Engagement/Organizational Change Management
    - Training
    - Rollout, User Support, and Operations
    - Contract and Deliverables Management
- ***Solution***
    - Vendor Procurement
    - Business Processes / System Functionality

  - Solution Requirements, Design, and Configuration
  - Solution Integrations
  - Information Retrieval and Reporting
- ***Data***
  - Data Preparation
  - Data Conversion
- ***Infrastructure***
  - Statewide Infrastructure
  - Local Infrastructure

For each area of assessment within a Project Area, we document in our QA Dashboard our observations, any issues and/or risks that we have assessed, and our recommendations. For each area we assess activities in the following three stages of delivery:

- **Planning** – is the project doing an acceptable level of planning?
- **Executing** – assuming adequate planning has been done, is the project performing tasks in alignment with the plans the project has established?
- **Results** – are the expected results being realized? (A project that does a good job of planning and executing those plans, but does not realize the results expected by stakeholders, is a less than successful project. Ultimately, r*esults are what the project is all about!*)

Assessed status is rated at a macro-level using the scale shown in the table below.

Assessed Status	Meaning
Extreme Risk	**Extreme Risk:** a risk that project management must address or the entire project is at risk of failure; these risks are "show-stoppers"
Risk	**Risk:** a risk that is significant enough to merit management attention but not one that is deemed a "show-stopper"
Risk Being Addressed	**Risk Being Addressed:** a risk item in this category is one that was formerly red or yellow, but in our opinion, is now being addressed adequately and should be reviewed at the next assessment with an expectation that this item becomes green at that time
No Risk Identified	**No Risk Identified:** "All Systems Go" for this item
Not Started	**Not Started:** this particular item has not started yet or is not yet assessed
Completed or Not Applicable	**Completed/Not Applicable:** this particular item has been completed or has been deemed "not applicable" but remains a part of the assessment for traceability purposes

We recognize that simultaneously addressing all risk areas identified at any given time is a daunting task–and not advisable. Therefore, we prioritize risk items in our monthly reports as:

1. Very Urgent Consideration
2. Urgent Consideration
3. Serious Consideration

Rating risks at the macro-level using the assessed status and urgency scales described above provides a method for creating a snapshot that project personnel and executive management can review quickly, getting an immediate sense of project risks. The macro-level ratings are further refined by describing in detail what the risk/issue is and what remedial actions are being taken/should be taken to address the risk/issue. The result is a framework for AOC CLJ-CMS

management to evaluate project risks–in terms of business objectives and traditional project management tasks.

We summarize the *bluecrane* QA Dashboard in Part 1 of our monthly report for review with client executives and project management. Part 2 of our monthly report provides the detailed QA Dashboard with all of the elements described above.