

Port of Tacoma
PMIS Fit/Gap Matrix
March 2026

					MARK ONE OF THESE COLUMNS (Instructions on Next Tab)					REQUIRED WHEN COLUMNS I OR J ARE SELECTED
ID	Section	Requirement	Requirements Notes	Priority (Critical/Medium)	Out of the Box	Config Needed	Customization Needed*	3rd Party Needed*	GAP (No Solution)	Notes/ Elaboration *Required When Columns "I" or "J" Select
1	Access & Security	Assign multiple roles to internal and external users depending on project/activity	Ability to assign roles to internal and external users and grant permissions based on roles on global and project level; external vendors must have ability to have multiple contacts with different roles	Critical						
2	Access & Security	Distinct role segregation	Project Administration and report configuration doesn't require System Admin role/rights *RBAC	Critical						
3	Access & Security	ENTRA/SAML (SSO)		Critical						
4	Access & Security	Vendor portal for invoice submission and PO line matching		Critical						
5	Budget & Financials	Commitment Change amounts	Need to track changes for all commitment types	Critical						
6	Budget & Financials	Commitment Costs to Date	The actuals to date for each individual commitment must be visible to users	Critical						
7	Budget & Financials	Commitment Original Value	Always track what the original value of each individual commitment must be visible to user	Critical						
8	Budget & Financials	Commitment remaining amount	The amount remaining on each individual commitment must be visible to users	Critical						
9	Budget & Financials	Identify Project as grant-funded	Need indication whether project is grant-funded	Medium						
10	Budget & Financials	Perform cash flow forecasting and budget planning	Perform cost to complete forecasts (at the project and program level) that include phase of work and required resources	Medium						
11	Budget & Financials	Real-time daily budget tracking with seamless change order and budget revisions & transactions	Need integration from ERP to PMIS to get regular (maximum daily) updates of authorization, budget, commitments, and total amount of transactions	Critical						
12	Budget & Financials	Tag transactions with phase & activity	e.g., Design, Consultant; Construction, Consultant	Medium						
13	Budget & Financials	Unified financial view of my project - dashboard	Project accounting (budgets, authorizations, actuals, ect.) for a complete financial picture with drilldown to transactions	Critical						
14	Budget & Financials	View all Commitments	User must have visibility to all commitments on a project, department, program, etc. Information must include original value, amendements (changes), paid amounts, remaining amount, and end date	Critical						
15	Budget & Financials	View authorizations	User must have visibility to original amount of authorization, any revisions, paid amount, and remaining amount	Critical						
16	Budget & Financials	View Project Budget total	Integration from ERP to PMIS to view total project budget original amount, revisions, and remaining amounts	Critical						
17	Budget & Financials	View Project Costs to Date (Date Range)	User must have ability to look at total costs to date across all commitments and transactions by a date range and life of project	Critical						
18	Budget & Financials	View Remaining Authorization (life of project)	User must have ability to look at original authorization, amount spent against authorization, and remaining amount of authorization by a date range and life of project	Critical						

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19	Contract & Construction Management	Create and manage the construction contract lifecycle (workflows) (Internal and External communication) - See Notes for details	Examples of types of documents for workflow: Notice to Proceed Substantial/Final Completion Final Acceptance Approval to Procure Change Orders Construction documents with Contractor: RFIs, submittals, meeting minutes, inspection reports, directives, punch lists, as-builts, etc. with (internal) staff, and (external) consultants and contractors	Critical						
20	Contract & Construction Management	Support Processing via Workflow (Receive, Review, and Approval) of All Invoices Related to Project		Critical						
21	Contract & Construction Management	Support Schedule of Values (SoV) for Public Works Contracts	Schedule of value line items need to roll up to the original contract bid item	Critical						
22	Controls	Cost controls for construction contract line items	The individual line items of a contract are not exceeded	Critical						
23	Controls	Cost controls for invoice approvals and change orders	The project authorization is not exceeded	Critical						
24	Data Analytics & Reporting	Access to data for self-service reporting	Schemas, data definitions, etc. Native connections to Microsoft Azure services so Port can mine data for analytics and reporting without relying on vendor support	Critical						
25	Data Analytics & Reporting	Integration with semantic model	To be determined during engagement	Critical						
26	Data Analytics & Reporting	Live enterprise dashboards and ad hoc reporting, on-demand queries and inquiries for business unit; Project, Program, and Portfolio Financial Dashboards		Critical						
27	Document Management	Archive All Documents to SharePoint (Respository of Record)		Medium						
28	Document Management	Collaborate and sharing of documents with external users		Medium						
29	Document Management	Documents stored in SharePoint are accessible in PMIS and PMIS generated documents are saved in SharePoint in a defined folder structure	SharePoint is our primary document repository	Medium						
30	Document Management	Generate, manage and archive all documentation for life of project - example documents include change orders, meeting minutes, RFIs, submittals, field changes, daily inspection reports, and project logs	Store, manage and access project artifacts up to 100mb (e.g., drawings)	Critical						
31	Document Management	Mobile application to manage document review, change order, drawing review and approvals, etc.		Medium						
32	Integrations & Systems	D365 Sales CRM Integration		Medium						
33	Integrations & Systems	D365 F&O Integration	D365 is the ERP system of record - Budgets to and from D365 Finance & Operations (5-10 data points) - Spending Authorizations from D365 F&O (5-10 data points)	Critical						
34	Integrations & Systems	GIS integration	ArcGIS Pro integration	Medium						
35	Integrations & Systems	MS Teams Integration		Medium						

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36	Integrations & Systems	Power BI Connector	to make dashboard and reporting with live updates and table connections	Critical						
37	Integrations & Systems	REST Based API	So we have tight integrations with our current ERP	Critical						
38	Integrations & Systems	The solution to be available at a miniumum of 99.9% of the time	System SLA	Medium						
39	Schedule Management	Ability to import/export MS Project schedule(s)		Medium						
40	Schedule Management	Forecast a project based on both actual spend and loaded schedules		Medium						
41	Schedule Management	Manage resources across all projects		Medium						
42	Technical Support	Access to vendor's support ticket management system		Medium						
43	Technical Support	Non-Production environment always available for integration and configuration validation	Looking for promotion path	Critical						
44	Technical Support	Robust technical support model	System issues and questions are addressed completely, adequately and timely (Support SLA)	Critical						
45	Workflow & Communication	Configure workflows	Workflows must be flexible to be set up based on supervision, roles and/or dollar amount. Ability to have conditionals to address items such as role permissions, dollar amounts, if/then, etc.	Critical						