Role Based My Processes – Project Manager

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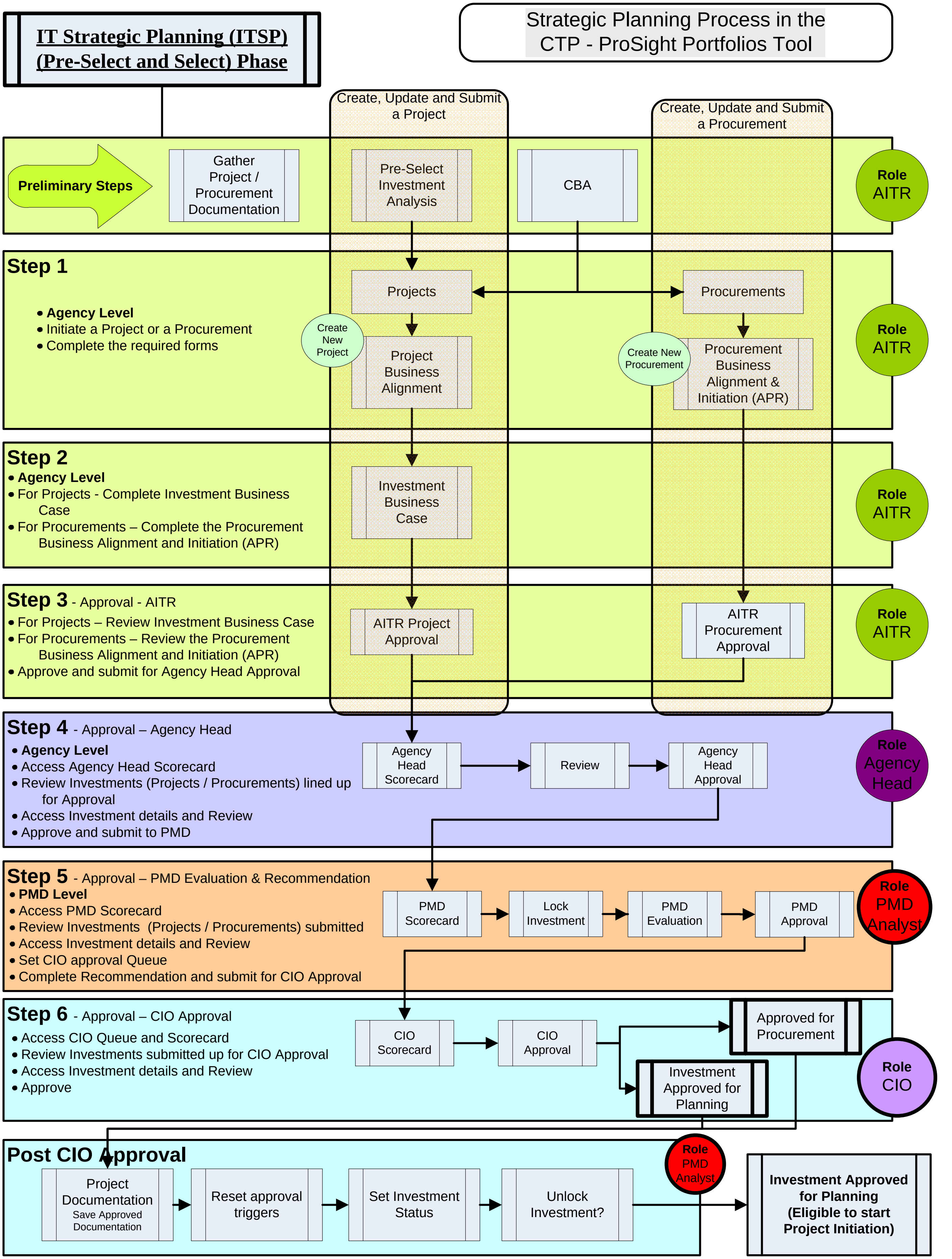
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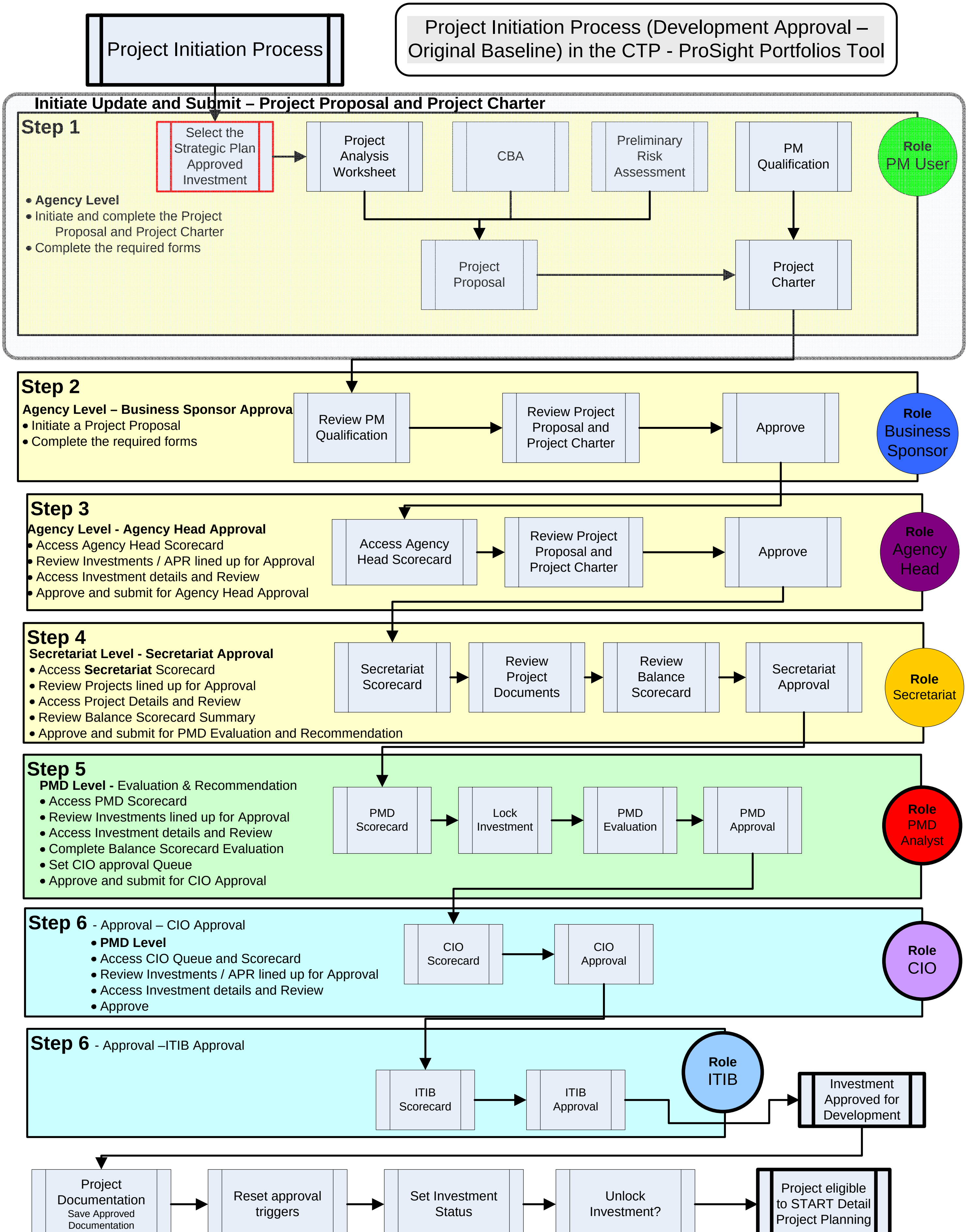
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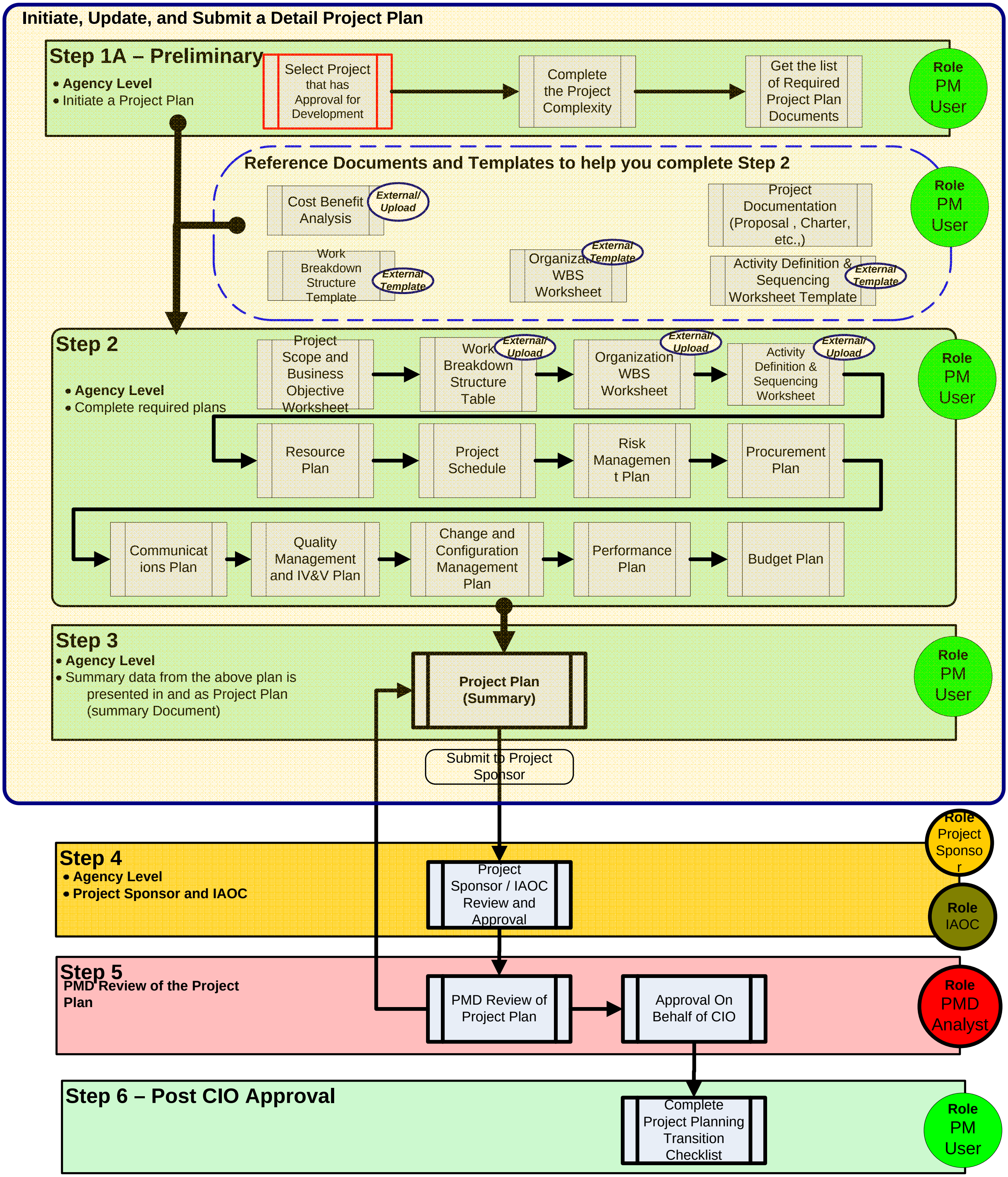
Project eligible to START Detail Project Planning

II

Project Planning Process

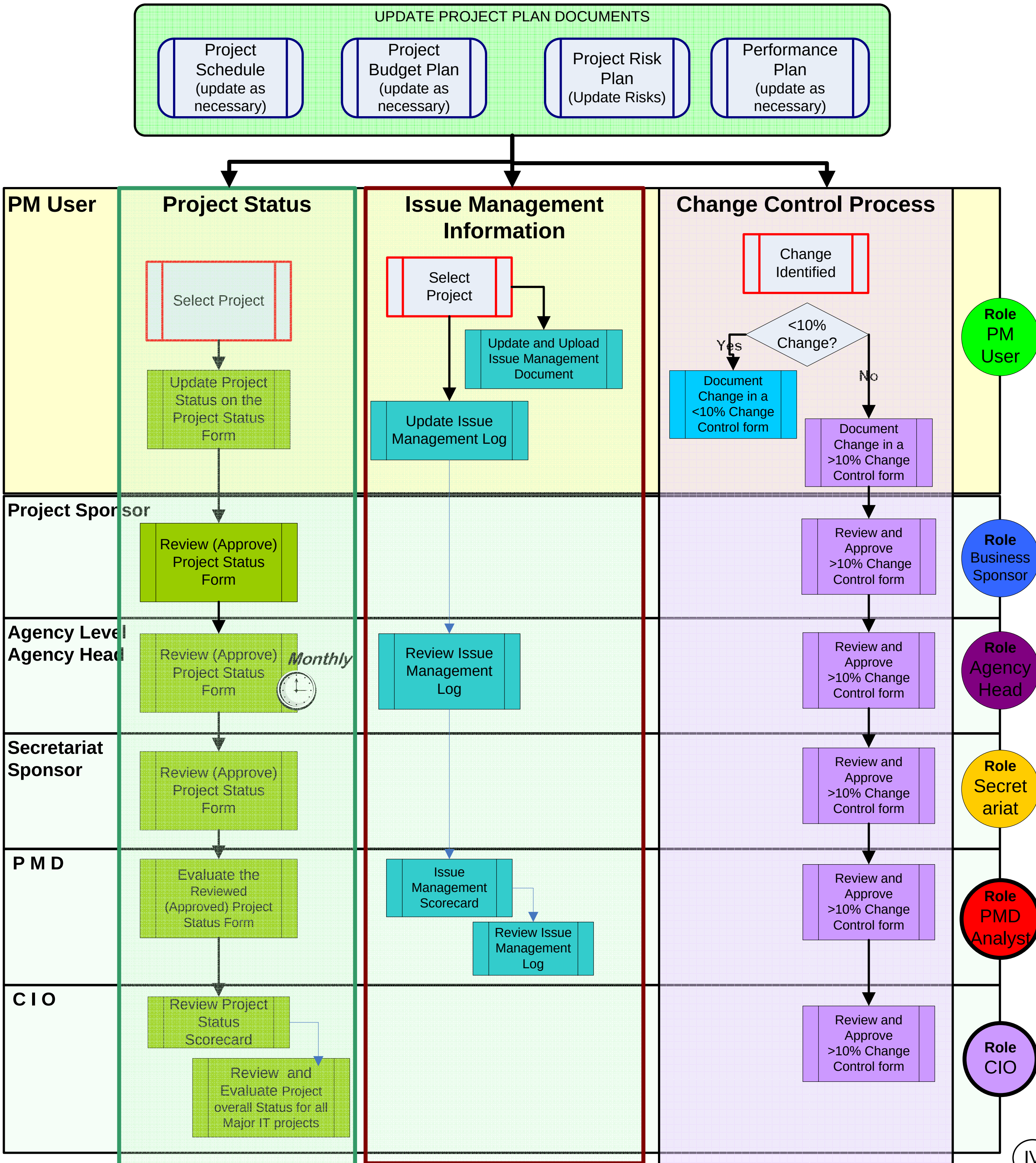
CONTROL Phase – Project Planning Process in ProSight Portfolios Tool



Control Phase – Execution and Control Processes

Execution and Control Processes in the CTP - ProSight Portfolios Tool

Process involves update of Project Plan Documents and review and update to
- Project Status Report
- Issue Management Log
- <10% Change Control Requests and >10% Change Control Requests



ROLE: Project Manager (User)

Project Manager is responsible for the completion of the following tasks:

1. Project Initiation Phase:

1.1. Initiate, Update and Submit – Project Proposal and Project Charter

2. Project Planning Phase:

2.1. Initiate, Update and Submit – Detailed Project Plan

3. Project Execution and Control Phase:

3.1. Initiate, Update and Submit - Project Status Report
3.2. Initiate, Update and Submit - Issue Management Log:
3.3. Initiate, Update and Submit - ≤10% Change Control Request
3.4. Initiate, Update and Submit - >10% Change Control Request
3.5. Complete Project Execution and Control Transition Checklist

4. Project Closeout Phase:

4.1. Update and Submit - Project Closeout Report
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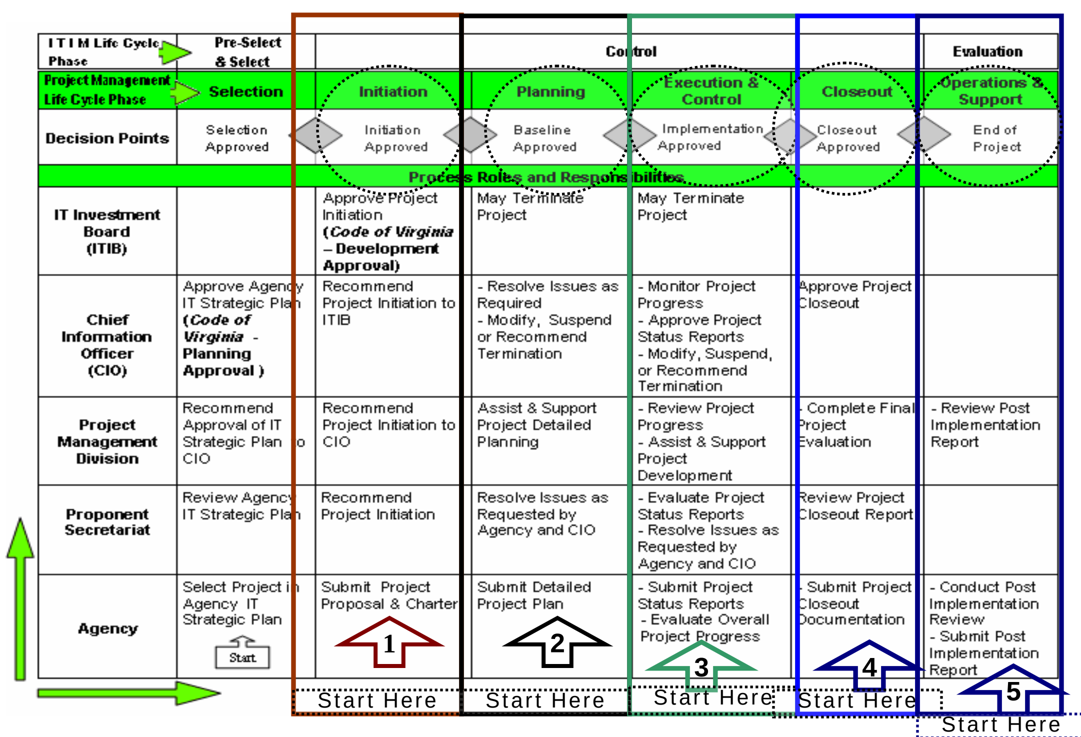
4.3. Archive all Project Documentation
4.4. Complete Project Closeout Transition Checklist

5. Project Evaluation Phase:

5.1. Complete Project Implementation Report

6. Other Major Tasks:

6.1. Maintain all project documentation within ProSight



Process 1. Project Initiation Phase:

During Initiation, IT projects identified in an agency approved IT Strategic Plan are transitioned from an idea to a viable project proposal for consideration and approval by agency executive management. A project charter is issued by the project initiator or sponsor that formally authorizes the existence of a project, and provides the project manager with the authority to apply organizational resources to project activities.

Sub-Process 1.1. Initiate, Update and Submit Project Proposal and Project Charter:

Project Managers or person with the delegated responsibility must complete and submit project proposal and project charter.

Step 1 - Agency uses Project Analysis Worksheet

The Project Analysis Worksheet can assist project managers and agency management in assembling and analyzing information to determine the best solution to resolve the business problem. It also provides information to support management decisions on whether the project should be undertaken. The worksheet presents, in a systematic manner, the solution selected, and the rational for that selection. Information from the worksheet is transferable to the Project Proposal Document and Project Charter.

Form - Project Analysis Worksheet

For all Project Proposals and Charters, the following tools are available for assistance:

External Tool - *Cost Benefit Analysis Tool*

- Provides a preliminary cost estimate and a systematic approach to estimating the strengths and weaknesses of IT alternatives that satisfy agency business requirements.

Instructions - *How to Conduct Cost Benefit Analysis*

- Provides instruction on how to use the CBA tool and instructions on How-to Conduct CBA.

Form - Project Analysis Worksheet

- Update worksheet with figures from the CBA analysis tool.

Form - Preliminary Risk Assessment

- Use the Preliminary Risk Assessment to analyze risk for the project.

Step 2 - Agency MUST complete a Project Proposal

The Project Proposal is the formal proposal to undertake a specific project with a specific solution. The goal of the Project Proposal is to establish the detailed business case for the project and serve as the information source for investment decision makers to determine whether the project should be planned for execution. The project sponsor and Agency Head approve the proposal. The information approved in the project proposal is the basis for the subsequent Project Charter.

Form - Project Proposal **(Required Form)**

Step 3 - Agency may complete a Project Manager Qualification form
Every Commonwealth IT project must have a designated project manager. The project manager is responsible for the management of the project from planning through closeout. The project manager for a major IT project will be appointed and qualified by the project sponsor and approved by the CIO. Project sponsors will qualify and approve project managers of non-major IT projects. The CIO will consider the non-major IT project manager's qualification status as part of the criteria for non-major IT project development approval. This form provides a summary of the project manager qualifications for the project, allowing easy review and approval by the agency, PMD and the CIO.

Form - PM Qualification **(Recommended)**

Step 4 - Agency MUST complete a Project Charter
A project charter formally communicates the existence of a project. The project charter is the basis for project planning, appoints the project manager, and authorizes the expenditure of resources. The Project Charter must be approved and signed by the approving authority, agency director, project sponsor, and project manager. Cabinet Secretaries and other key stakeholders as appropriate will sign the Project Charter. The approvals formally empower the project manager to expend resources on the project and conclude the initiation phase of the project.

Form - Project Charter

Step 5 - Agency PM MUST submit for approval the Project Proposal and Charter.
The Agency PM can work with PMD on completing the Project Proposal and Project Charter. PMD reviews the Proposal and the Charter and assists the Agency in resolving issues with the documents. The approved Proposal and Charter set the initial baseline for the project. The approval submittal for the Proposal and Charter is on the Charter Approval tab. Once submitted for approval, the Project sponsor or designated representative reviews and approves.

Step 6 - Project Sponsor or designated representative MUST approve the Project Proposal and Charter

Step 7- Agency Head MUST approve Project Proposal and Charter

Approval Versions
** There are three versions of Project Baseline forms: "Original Approved", "Last Approved", and the "Open" versions. After initial approval, the Original Approval version is saved. Any changes to the form can be entered in the Open form. Once a change is approved to the Original Approved version, it becomes the Last Approved version. Every subsequent change becomes the Last Approved version. The Open version is always available and is used to make changes to the form. The Original Approved form version is always available for review. Because the Last Approved form is updated each time it is used, version control MUST be accomplished by uploading each approved version in the portfolio tool.**

Step 8 - Secretariat Approval of the Project Proposal and Charter

Step 9 - PMD prepares Balanced Scorecard Assessment and Decision Brief
PMD prepares Balanced Scorecard Assessment and a Decision Brief (for the Secretariat Oversight Committee (SOC). The SOC reviews and makes approval recommendations to the CIO. The Balanced Scorecard and Decision Brief is forwarded to the CIO.

Major IT projects are forwarded to the ITIB for a five day review. The ITIB approves CIO decision or rejects and directs other actions.
Upon ITIB approval, the CIO will forward an Approval for Development (letter) to the Agency Head.

Step 10 - CIO Approval
The CIO reviews, approves/disapproves or requests further information. Approval for Development begins the Planning phase of the project lifecycle.

**** After CIO/ITIB Approval all baseline categories for the project are LOCKED.****

> **The baseline categories:** scope statement, milestones, and budget data are locked after CIO/ITIB approval. NO changes to the approved baseline categories can be accomplished. Any agency changes to baseline category information must use the Control phase's Change Control process.

Step 11 - ITIB Approval
Major IT projects are forwarded to the ITIB for a five day review. The ITIB approves CIO decision or rejects and directs other actions.
Upon ITIB approval, the PMD Oversight Director sets the investment status category. The CIO will forward a formal Approval for Development (letter) to the Agency Head by email.

Step 12 -Agency MUST upload (save) Documents to the Portfolio

Steps to Save documents:
1) Ensure you have selected the correct "Item"; i.e. the project.
2) On the Black toolbar, choose "Item".
3) Select "Documents…"
4) Click the "Upload…" button
5) On the General tab, Browse to the location of the file you wish to upload
6) Ensure the "Place a link in the Item's link list" box is checked.
7) Owner is automatically filled out based on the user log-in
8) Provide a description of the file in the Description Box
9) Select "OK"
Document is uploaded to document repository for the project, and shows up in the "document links" directory for the associated item in your workbook.
9) Close the Documents wizard by selecting "Close"

Step 13 - PMD ensures documentation is uploaded
PMD will ensure the appropriate project documents have been uploaded by the Agency. In addition, PMD will save a copy of the project Scorecard Evaluation form to a PMD directory.

Step 14 - Project Manager completes the Project Initiation Transition Checklist
The Project Initiation Transition Checklist is available to assist the Project Manager in transitioning to the next phase.

Process 2. Project Planning Phase:

The Project Planning Phase begins after approval of the Project Charter and concludes with approval of the Detailed Project Plan. A CIO-approved (ITIB-approved) Project Charter is required to start the Project Planning Phase. Objective of this phase is to produce a CIO-approved Detailed Project Plan

Sub-Process 2.1 Initiate, Update and Submit – Detailed Project Plan:
Project Managers are responsible to complete and submit the Detailed Project Plan and other supplemental plans.

Step 1: Complete the Project Complexity Form
The Project Complexity Model determines, based on project complexity, which project management documents are required to be completed.

"**Required Form**s**"** identified below, are mandatory, regardless of project complexity.

Form - Project Complexity Form **– Required Form**

Step 2: Complete Detailed Project Plan:
Forms below are listed in the recommended sequence. Generally, each form builds upon the previous form. The forms together comprise the Detailed Project Plan.

Example: Resource Plan will help complete the Project Schedule, and Resource Plan and Project Schedule are required to complete the Budget plan.

Form - Project Scope and Business Objective Worksheet

Upload - Work Breakdown Structure
Reference / Template – Work Breakdown Structure (Link to the template - external link) (http://www.vita.virginia.gov/projects/cpm/templates.cfm)

Upload – Organization Work Breakdown Structure
Reference / Template – Organization Work Breakdown Structure (Link to the template - external link) (http://www.vita.virginia.gov/projects/cpm/templates.cfm)

Upload - Activity Definition & Sequencing Worksheet
Reference / Template – Activity Definition & Sequencing Worksheet (Link to the template - external link) (http://www.vita.virginia.gov/projects/cpm/templates.cfm)

Form - Resource Plan
Form - Project Schedule **– Required Form**
Form - Risk Management Plan - **Required Form**
Form - Procurement Plan
Form - Communications Plan

Form - Quality Management and IVV Plan **– Required Form**
Form - Change and Configuration Management Plan
Form - Performance Plan **– Required Form**
Form - Budget Plan **– Required Form**
Form - Project Plan Summary **– Required Form**

Step 3: Submit the completed Detailed Project Plan for Project Sponsor approval:

Form - Project Plan Summary **– Approval Tab**

- Click on the Approvals Tab
- Complete all Project Manager Approval Fields
- Click on "Submit" button to submit/save the Project Plan Summary.

Step 4: Send e-mail to the Project Sponsor:
Send e-mail to the Project Sponsor to communicate submission of Detailed Project Plan.

<u>Instructions on how to use ProSight Tool's e-mail functionality:</u>
ProSight e-mail functionality will allow you to e-mail a view to another ProSight user. The e-mail address used is based on the user address that is set up in ProSight.

- To **e-mail** a link to the current Item (project plan summary approval tab) to a ProSight user:
  - Choose the Send Page button - **or -**
  - Choose "Collaborate" from the Forms / Menu Bar
- An e-mail screen will be displayed
  - Select the e-mail address by clicking on the "to" button of the e-mail screen - or –
  - Manually enter the e-mail address
  - Compose the message.
  - Click on the "Send" button of the e-mail screen to send the e-mail

Step 5: Submit Project Plan to PMD:
After the Project Plan is approved by the IAOC, the Project Manager should submit the same to PMD. Send e-mail to the PMD to communicate submission of Detailed Project Plan.

Step 6: Complete the Project Planning Transition Checklist
Project Planning Transition Checklist assists the project manager in transitioning to the Execution & Control Phase.

Form -Project Planning Transition Checklist

Process 3. Project Execution & Control:

The Project Execution and Control Phase is the part of the project and product lifecycle where the tasks that build the deliverables are executed. The Project Execution & Control Phase begins when the Detailed Project Plan is approved and the resources necessary for executing the starting task are assembled. Project execution should be in accordance with the approved project plan.

Project execution and control consist of task execution, measuring project progress, reporting project status, and exercising management controls. This phase ends when the product, good, or service developed has met the user acceptance criteria established in the performance plan and a user acceptance document has been completed.

Project Managers are responsible to complete the following:
- Project Status Report
- ≤10% Change Control Request
- >10% Change Control Request
- Project Execution & Control Transition Checklist

Sub-Process 3.1 Initiate, Update and Submit the Project Status Report:
Project Status is required to be updated and reported on a monthly basis or the project status will be inaccurate.

Step 1: Update Project Plan
The Project Plan must be updated monthly prior to submission of the Project Status form.

Form - Project Schedule
Form - Budget Plan
Form – Risk Management Plan
Form - Performance Plan

Step 2: Complete Project Status Report

Form - Project Status Report - Required Form

Step 3: Submit Project Status Report

Form - Project Status Report
- Approval/Submission fields are on the Project Status Report - Summary Tab (at the bottom of the page)
- Update approval/submit date field with the latest date.

<u>Sub-process 3.2 Initiate, Update and Submit the Issue Management Log:</u>
Issue Management Log is updated and reported on an as-needed basis.

Complete Issue Management Document Template

Template: Issue Management Document Template

- Complete the Issue Management Document Template (outside of ProSight)
- Save the Issue Management Document Template – Name of the Saved file should be the same as the Issue Name entered in the Issue Management Log
- Upload the Issue Management documents

<u>Sub-Process 3.3. Initiating, Updating and Submitting the <10% Change Control Request:</u>
Cumulative baseline changes that do not exceed 10 percent must be approved by the IAOC and submitted to PMD. Project Managers should initiate, update and submit ≤10% Change Control Requests.

Step 1: Update Project Schedule (as necessary)
Project schedule changes (if any) should be updated in the Open Version of the Project Schedule

Form - Project Schedule

Step 2: Update Budget Plan - Cost Fields (as necessary)
Project budget changes (if any) should be updated in the Open Version of the Budget Plan

Form - Budget Plan

Step 3: Complete ≤10% Change Control Request Form

Form - ≤ 10% Change Control Request Form

Step 4: Submit ≤10% Change Control Request to the Internal Agency Oversight Committee (IAOC)
Export (download) the <10% Change Control Request Form and e-mail the same to the IAOC members using Outlook e-mail

Instructions on how to use Export (download) a document (form, Scorecard, etc.,) from ProSight:

ProSight document export functionality will allow you export and save a document (forms, scorecards, etc.,) to your local drive.

- To export (download) and Save a form
  - Click on the Form on the Menu Bar
    - Select "Export" from the form dropdown
  - Export Setting Window will appear
    - Select appropriate options
      - Range / Content / Display Graphics?
      - Microsoft Office Versions

    - Page orientation
  - Click OK
- File Download Window will appear
  - Click on "Save" and save it to on you desired drive.

- Please use your MS Outlook (or other e-mail) to e-mail to document.

Step 5: Submit IAOC Approved ≤10% Change Control Request to the PMD
Send e-mail to the PMD to communicate IAOC approval of the ≤10% Change Control Request

Instructions on how to use ProSight Tool's e-mail functionality:

ProSight e-mail functionality will allow you to e-mail a view to another ProSight user. The e-mail address used is based on the user address that is set up in ProSight.

- To e-mail a link to the current Item (project plan summary approval tab) to a ProSight user:
  - Choose the Send Page button or –
  - Choose "Collaborate" from the Forms / Menu Bar
  - An e-mail screen will be displayed
    - Select the e-mail address by clicking on the "to" button of the e-mail screen - or
    -- Manually enter the e-mail address
    -- Compose the message.
    -- Click on the "Send" button of the e-mail screen to send the e-mail

Step 6: (PMD) Upon IAOC approval of the baseline change, PMD will update the Project Baselines (No action required by Project Manager).

<u>Sub-Process 3.4. Initiating, Updating and Submitting the >10% Change Control Request:</u>
Cumulative cost, schedule, scope changes greater than 10 percent from the last approved baseline must be approved by the Internal Agency Oversight Committee (IAOC), Secretariat Oversight Committee, and the CIO.

Step 1: Update Project Schedule (as necessary)
Project schedule changes (if any) should be updated in the Open Version of the Project Schedule

Form – Project Schedule

Step 2: Update Budget Plan – Cost Fields (as necessary)
Project budget changes (if any) should be updated in the Open Version of the Budget Plan

Form – Budget Plan

Step 3: Complete >10% Change Control Request Form

Form – >10% Change Control Request Form
- Provide the change information/data

- Click on "Submit" button to save >10% Change Control Request Form

Step 4: Submit >10% Change Control Request Form for Business / Project Sponsor Approval

Form - >10% Change Control Request Form – approval tab)

- Click on Approvals Tab of the >10% Change Control Request Form
  - Complete all User (Project Manager) Approval fields
- Click on "Submit" button to submit >10% Change Control Request Form for Business/Project Sponsor Approval

Step 5: (PMD) Upon CIO approval of the baseline change, PMD will update the Project Baselines. (No action required by Project Manager)

Sub-Process 3.5. Complete Project Execution and Control Phase:

Step 1: Complete the User Acceptance Report and upload the same

Template - User Acceptance Report (template)

Step 2: Complete the Project Execution and Control Transition Checklist
Project Execution and Control Transition Checklist assists the project manager in transitioning to the next phase.

Form - Project Execution and Control Transition Checklist

Process 4. Project Closeout Phase:

The Project Closeout Phase is the last phase in the project lifecycle. Closeout begins when the user accepts the project deliverables and the project oversight authority concludes that the project has met the goals established. The major focus of project closeout is administrative closure and logistics. The Project Manager initiates the Project Closeout phase.

Sub-Process 4.1. Updating and Submitting - Project Closeout Report

Project Manager is responsible for the completion and submission of the Project Closeout Report.

Step 1: Complete the Project Closeout Report:

Form - Project Closeout Report - **Required Form**

Step 2: Export (Download) the Project Closeout Report and e-mail to IAOC:

Export (download) the project closeout report and e-mail the same to the IAOC members using Outlook e-mail

Sub-Process 4.2. Update Project Lessons Learned on PMDP Website:

Project Manager is required to update lessons learned and project best practices in the PMDP Clearing House.

External Link – PMDP Clearing House

- Click on the link to go to the PMDP Clearing House website

Sub-Process 4.3: Archive all Project Documentation:

Project Manager is required to archive all project documentation. All project artifacts should be uploaded.

Workbook Module Link - Project Documentation

Instructions – *How to upload project documents*

1) Select "Project Documentation" link above.
2) Press "New".
3) Supply a document name.
4) Press "Upload"
5) Press "Browse"
6) Select the file.
7) Press "Open"
8) Press "Ok"
9) Press "Ok"
10) Link will appear in list.

Sub-process 4.4. Project Closeout Transition Checklist:

The Project Transition Checklist provides a vehicle to verify completion of a project phase before beginning the next phase. The transition checklist used at the closeout phase focuses on completion of project tasks and satisfying acceptance criteria. Additionally, the transition checklist forces the project team and using organization to address the issue transfer for both the deliverable and associated documentation.

Form - Project Closeout Transition Check List

Process 5. Project Evaluation Phase:

In the Project Evaluation Phase all new operational investments receive a Post-Implementation Review (PIR). In addition, the key performance metrics of mature investments are monitored and “out of bounds” performance statistics trigger in-depth review and analysis.

A Post Implementation Review (PIR) will be completed on all new investments within 6 – 12 months of the investment becoming an operational investment. For Commonwealth Investments, the PIR will follow the ITIM Guideline.

Sub-Process 5.1 Complete the Post Implementation Review:

A Post Implementation Review and Report documents the successes and failures of the project deliverable. A Project Sponsor or Manager should direct the review process

Post Implementation Report Format

- Cover Page
- Title
- Organization or Agency
- Date
- Authors Name
- Address
- Phone Number
- E-mail Address
- Executive Summary
- Table of Contents
- Introduction
- Background
- Post Implementation Review process or methodology used
- Project Proposal
- Project Charter
- Findings

Process 6. Other Major Tasks:

<u>Sub-Process 6.1. Maintain all project documentation within ProSight:</u>
Project Documentation including the following should be maintained and uploaded to the project documents area within ProSight.

Recommended documents naming convention:
The following is the recommended documents naming convention that should be followed to help in easy identification and retrieval of project documentation.

DocumentName.yyyy.mm.dd.doc
Example: StatusReport.2007.01.24.doc

Investment Business Case and Procurement Business Case Documents
Copy of approved Investment Business Case and Procurement Business Case Documents should be saved (exported) and uploaded immediately after final approval (example: after CIO approval).

Project Proposal and Project Charter:
Copy of approved Project Proposal and Project Charter should be saved (exported) and uploaded immediately after final approval (example: after CIO approval).

Project Schedule:
Project Schedule should be uploaded only in .mpp (Microsoft Project) format. Exceptions should be pre-approved by PMD.

Project Plan:
Copy of approved Project Plan should be saved (exported) and uploaded immediately after it is approved.

Relevant e-mails pertaining to approvals:
Relevant e-mails pertaining to approvals at every stage of Strategic Planning and project baseline approvals should be saved (as a PDF) and uploaded to the project documents.

Change Control Request Documents:
Approved Change Control Request documents (both <10% and >10% change) should be exported, saved as PDF and uploaded to the project documents area within ProSight.