

Commonwealth of Virginia

PM Training for Primavera Portfolios

Version 1, Primavera Portfolios 7.5 SP2

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Executive Summary

This document will walk the Project Manager (PM) through the various processes he or she will make use of as part of their daily business operations. The intent is to show the user how the documented processes and various Forms and Scorecards interact to facilitate the operations of both your Agency and the Project Management Division (PMD) operations, supporting the Portfolio Management Code of Virginia legislation. This document consists of textual information and pictures, working together to show the user the location, context, and placement of the various buttons, dropdowns, and links that are the focus of our attention.

Initiation Phase

A project cannot begin the Project Initiation Phase until it has been approved for planning. “Approved for Planning” is the project status assigned at the completion of the “Select” phase. It signifies the CIO approval for the agency to expend resources on developing a Project Proposal and Project Charter.

The end product of the Project Initiation phase is a CIO-approved Project Charter.

Project Initiation phase steps are completed either by the Project Sponsor, or by a Project Manager on behalf of a Project Sponsor.

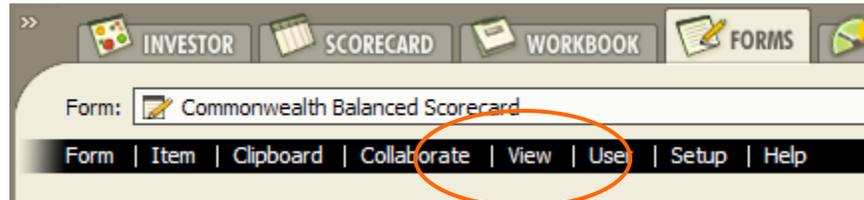
Process 1 Project initiation:

Complete the following steps to create a new project:

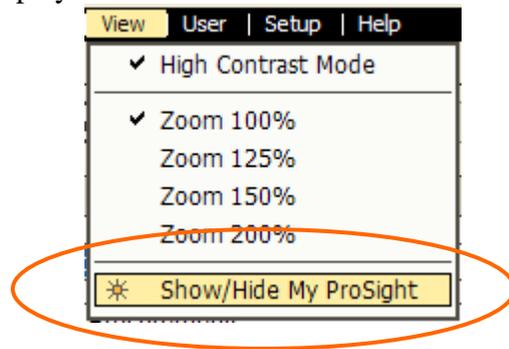
Instructions to Access a Project Business Alignment Form

Access My ProSight:

- Click on “View” button on the Primavera Portfolios Menu Bar



- Click on “Show/Hide My ProSight” from the Menu List “My ProSight” will be displayed on the left-hand side of the Screen



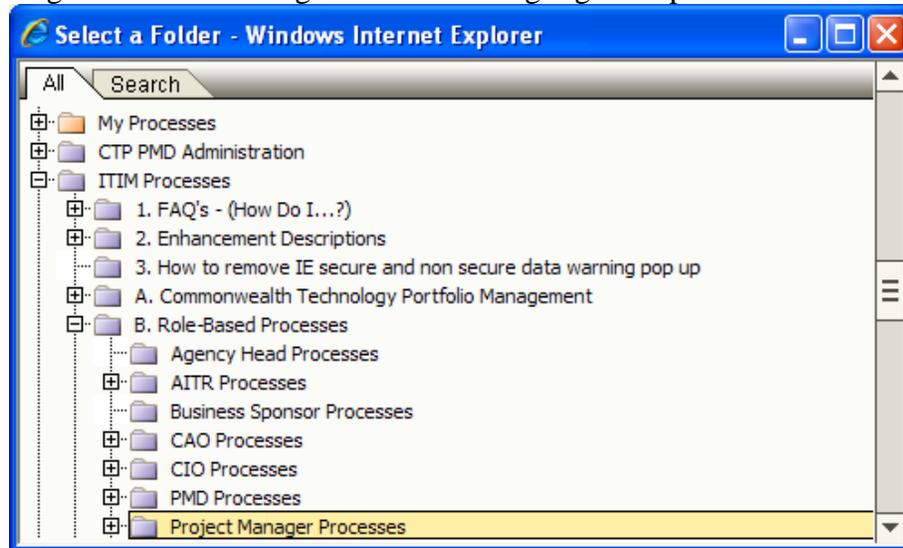
Access Project Business Alignment Form:

- In My ProSight Section (which just appeared) click on the drop- box option

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- From the drop-box select the following:
- Navigate to the following and select the highlighted option



- You are now looking at the parent location for all the Project Manager related processes as shown in the figure below.

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

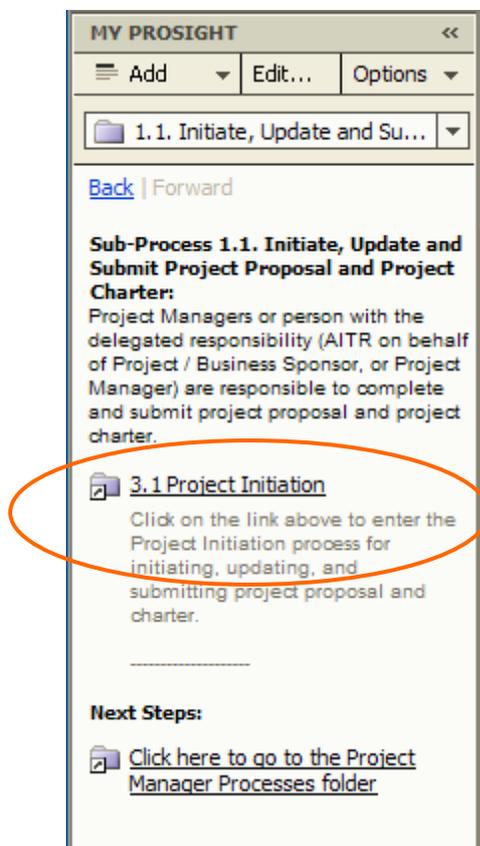
Select the option as shown in the figure below.

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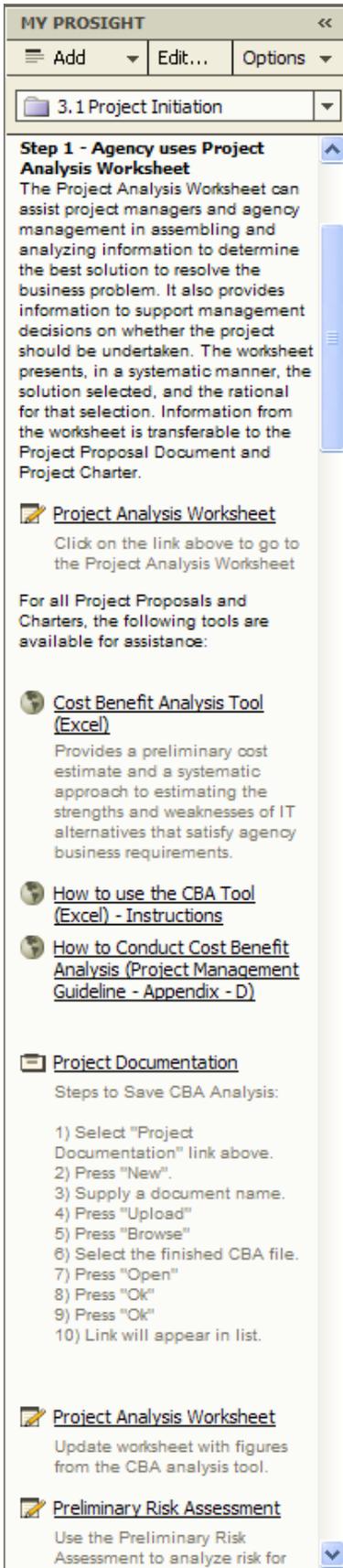
Once your display refreshes you will see the figure below, please make the selection as shown below.

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The screenshot displays the 'MY PROSIGHT' web interface. At the top, there is a header with the title 'MY PROSIGHT' and a back arrow. Below the header is a navigation bar with 'Add', 'Edit...', and 'Options' buttons. A breadcrumb trail shows '1. 1. Initiate, Update and Su...'. The main content area includes a 'Back | Forward' link, a bolded sub-process title 'Sub-Process 1.1. Initiate, Update and Submit Project Proposal and Project Charter:', and a paragraph of text explaining the responsibilities of Project Managers. Below this, a folder icon is next to the link '3.1 Project Initiation', which is circled in orange. Underneath is a paragraph of text: 'Click on the link above to enter the Project Initiation process for initiating, updating, and submitting project proposal and charter.' At the bottom, there is a 'Next Steps:' section with a folder icon and a link: 'Click here to go to the Project Manager Processes folder'.

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.



The sequence of steps that follow are necessary for the PM to document the initiation phase work.

Step 1: Agency uses Project Analysis Worksheet

Project Analysis Worksheet - This worksheet facilitates the documentation of the business problem and three possible solutions.

Cost Benefit Analysis Tool - allows the user to develop preliminary cost estimates by using a systematic approach to estimating.

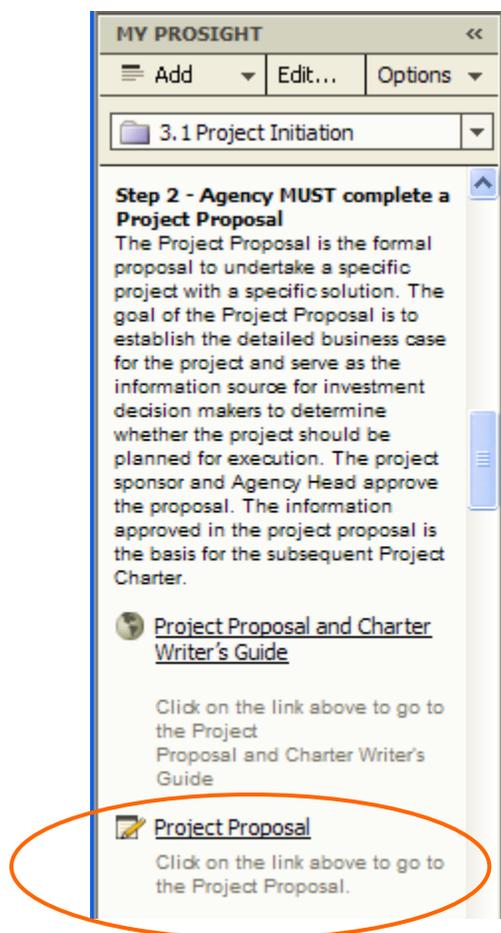
Project Documentation – This link will take the user to the Workbook where they can upload documents and provide links to documents stored elsewhere. Please be aware that providing a link doesn't necessarily mean every user will be able to view the document.

Project Analysis Worksheet – This link takes the user directly to the Solution Comparison tab and allows the user to compare the three solutions at a summary level.

Preliminary Risk Assessment – This link takes the user directly to the form and allows PMD to compare projects by using common risk criteria and a common scoring system.

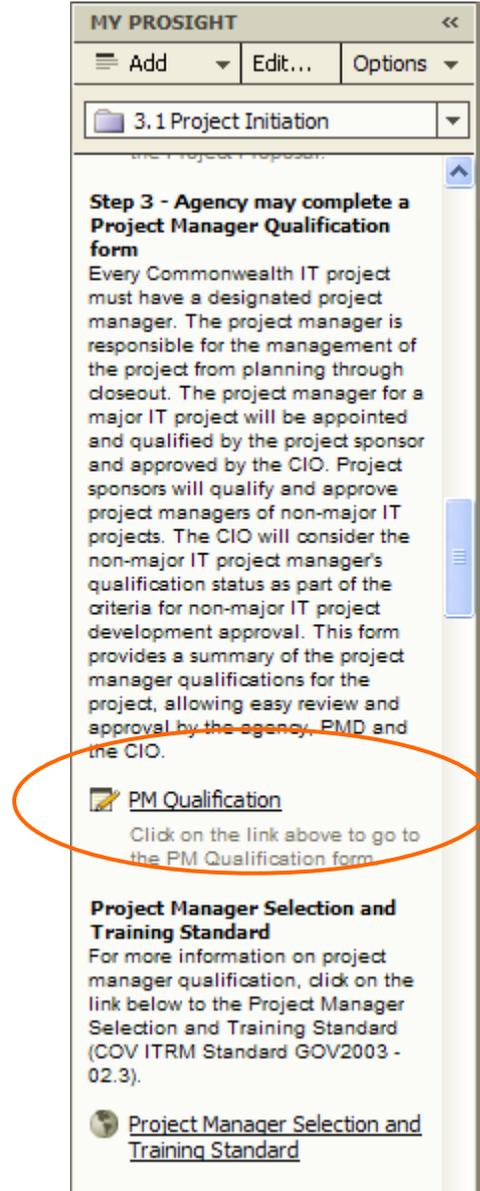
Step 2: Agency MUST complete a Project Proposal

The link in the figure below will take the user directly to the Project Proposal form, facilitating the documentation necessary for PMD to; rank, prioritize, approve, and fund the different IT projects within the Commonwealth of Virginia.



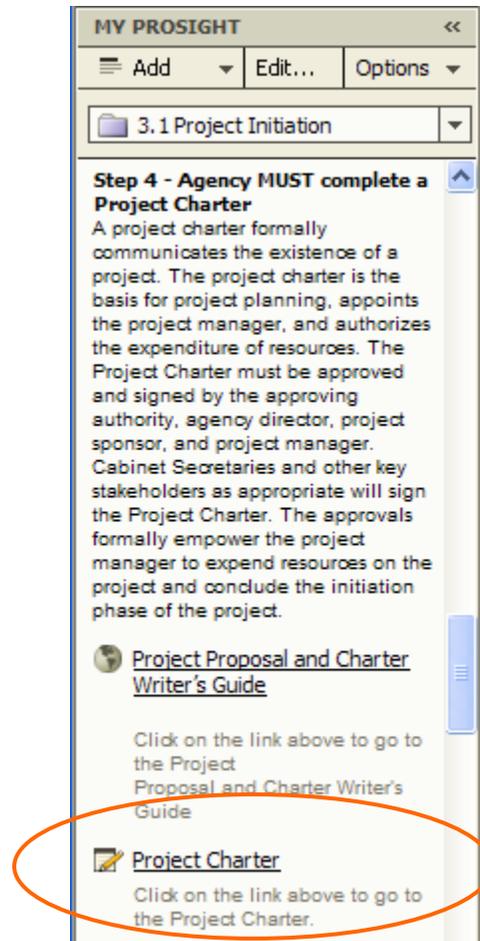
Step 3: Agency may complete a Project Manager Qualification form

The PM Qualification form allows VITA to compare project managers using common criteria, and common scoring methods, across the Commonwealth of Virginia. By clicking on the link in the figure below you will be taken directly to the qualification form. Please remember this form is filled out every time the PM is assigned to a Project.



Step 4: Agency MUST complete a Project Charter

The Project Charter formally communicates the existence of a project and is the basis for planning, appointments, and authorization of expenditure. As such, the document is necessary for the process to continue and to move the effort to the execution phase, where most of the expenditures take place. By selecting the link in the figure below the user will be taken directly to the Project Charter form where the PM can provide the necessary information.



Step 5: Agency PM MUST submit for approval the Project Proposal and Charter

The Project Proposal and Project Charter must be submitted to PMD for review and approval. Though the PM is able to view the different processes involved with the phase gated approval process, they have little input after the AITR submits the project for review. The links that follow are for informational purposes only as far as the PM is concerned.

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Once the PM as made the selection in the figure above they will be greeted by the next level in the process flow. The figure below represents this next level. We will introduce you to the Business Sponsor process as this is a critical part of the integral operations. Please click on the link circled in the figure below.

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MY PROSIGHT <<

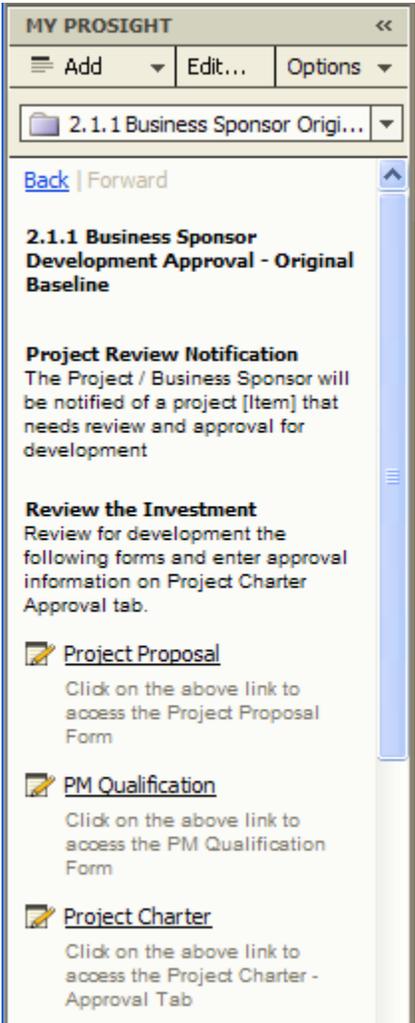
Add Edit... Options

2.1 Development Approval - ...

Back | Forward

Select Desired Approval Process

- Business Sponsor Development Approval - Original Baseline
- Agency Head Development Approval -Original Baseline
- Secretariat Development Approval - Original Baseline
- PMD Development Approval Recommendation- Original Baseline
- CIO Development Approval - Original Baseline
- ITIB Development Approval - Original Baseline



Sub Step 1: Business Sponsor Development Approval – Original Baseline

Please note, in the figure on the left, there are three links. Each of these links will take you to the specifically mentioned form allowing the Business Sponsor to review the information and render his/her approval. The last link titled “Project Charter” will take you directly to the tab where the Business Sponsor can render their approval.

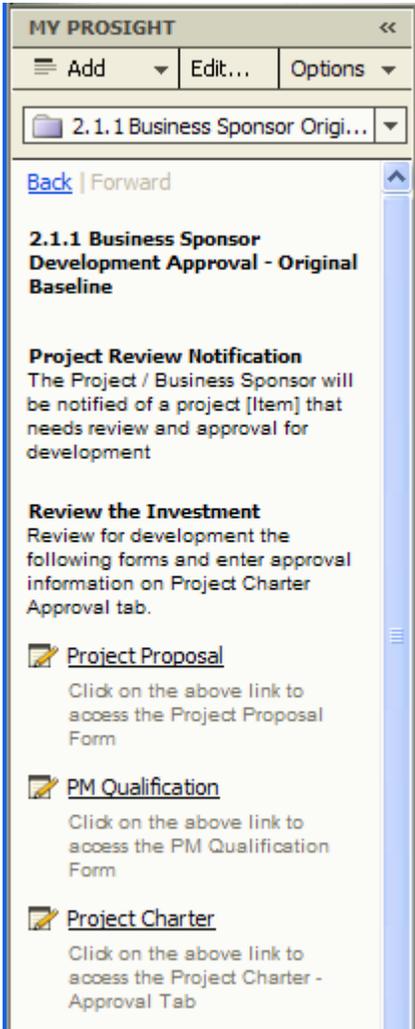
Step 6: Project Sponsor or designated representative MUST approve the Project Proposal and Charter

Once the PM has provided all the information the Business Sponsor starts the approval process with his/her approval. This is our next tour, please select the link below to continue.



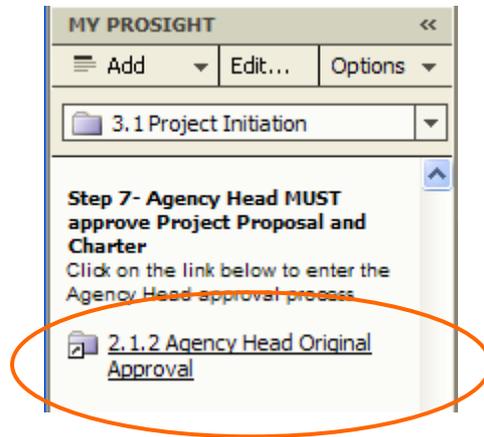
Sub Step 1: Project Review Notification

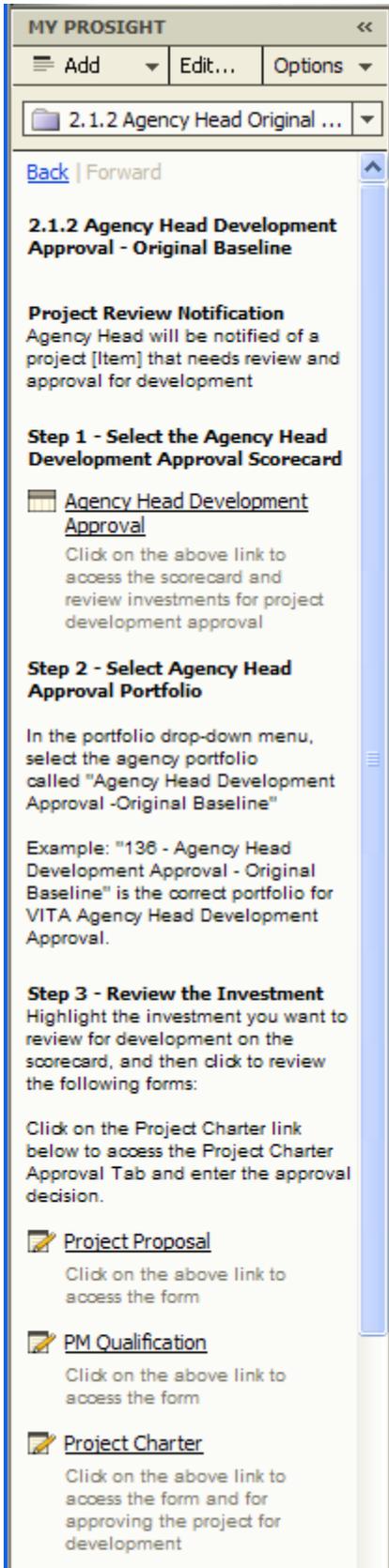
The Business Sponsor will receive an Email notification informing them of a Project that needs their review and approval. The figure to the left shows the process links that will walk the reviewer through the information, allowing them to render an approval or disapproval.



Step 7: Agency Head MUST approve Project Proposal and Charter

The Agency Head will be notified of a project [item] that needs review and approval for development. The figure below provides a link to the sub steps that will facilitate this activity.





The figure at the left shows the sequence of steps necessary to the Agency Head to approve a project.

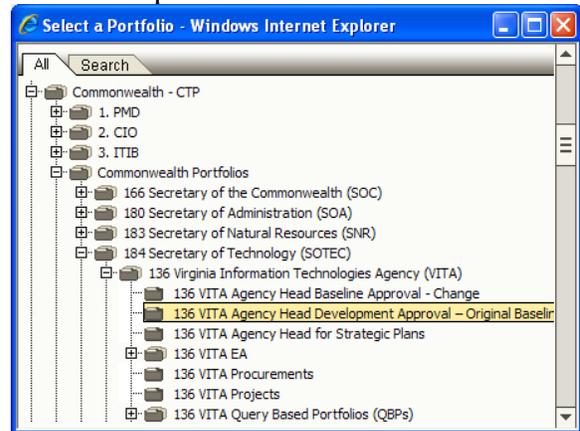
Sub Step 1: Select the Agency Head Development Approval Scorecard

This link will allow the Agency Head to go straight to the Scorecard used to display those projects needing approval.

Sub Step 2: Select the Agency Head Approval Portfolio

Each Agency has its own approval portfolios. In the upper right of the display (i.e.

) please select the “” to see a dropdown from which the user can select their portfolio. In the example below, the chosen portfolio is one of VITA’s.

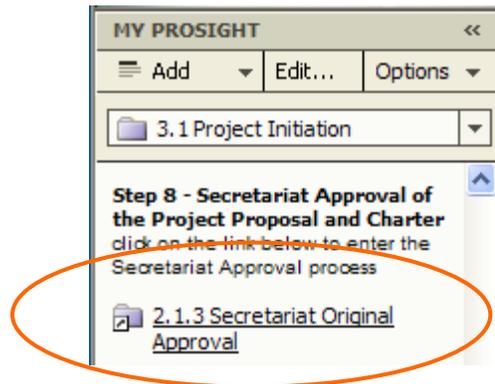


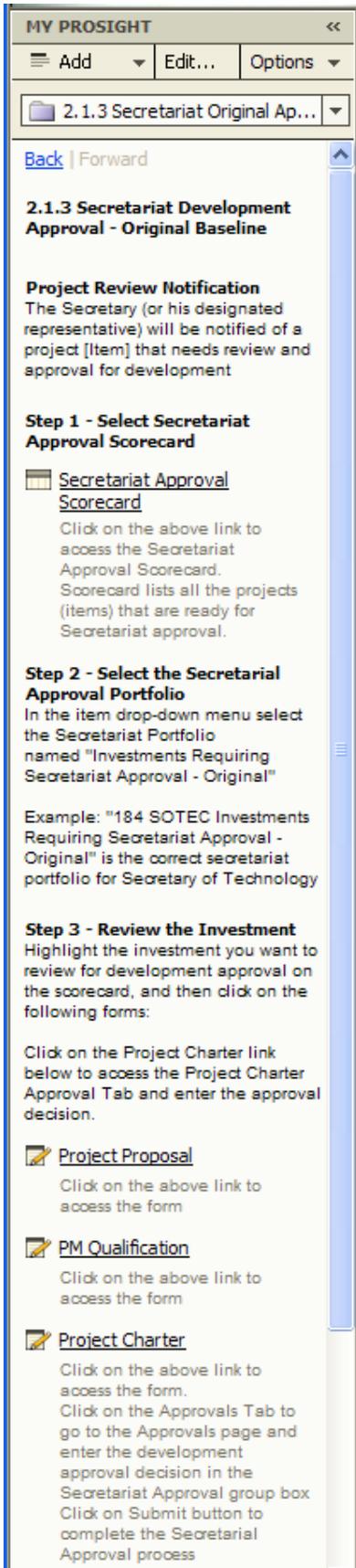
Sub Step 3: Review the Investment

This step contains three links allowing the user to view the Project information and render an approval.

Step 8: Secretariat Approval of the Project Proposal and Charter

The Secretary (or his designated representative) will be notified of a project [Item] that needs review and approval for development. When that occurs the link below should be selected.





The figure at the left shows the sequence of steps necessary for the Secretary to approve a project.

Sub Step 1: Select Secretariat Approval Scorecard

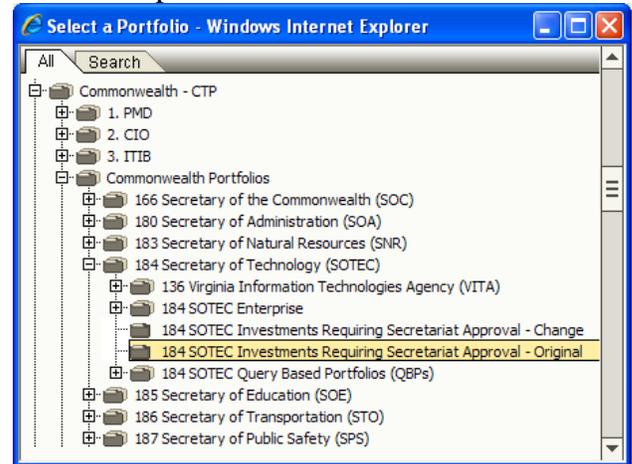
This link will allow the Secretary to go straight to the Scorecard used to display those projects needing approval.

Sub Step 2: Select the Secretariat Approval Portfolio

Each Agency has its own approval portfolios. In the upper right of the display (i.e.



) please select the “▼” to see a dropdown from which the user can select their portfolio. In the example below, the chosen portfolio is one of VITA’s.

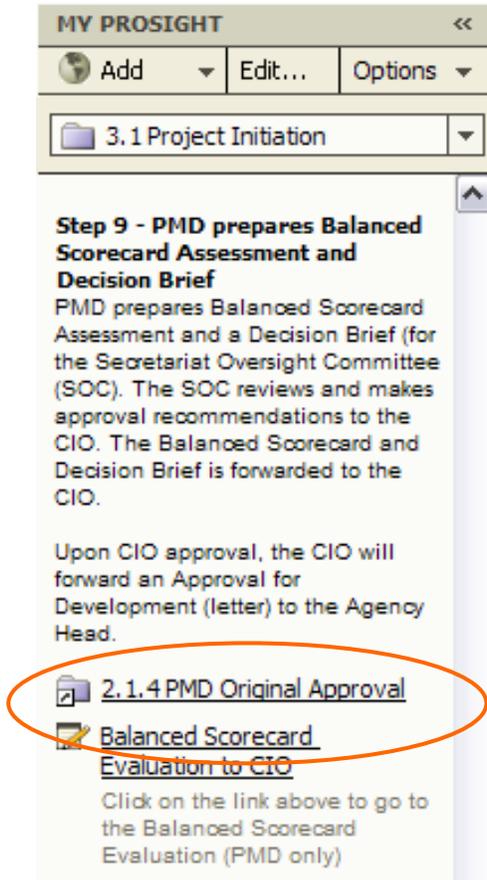


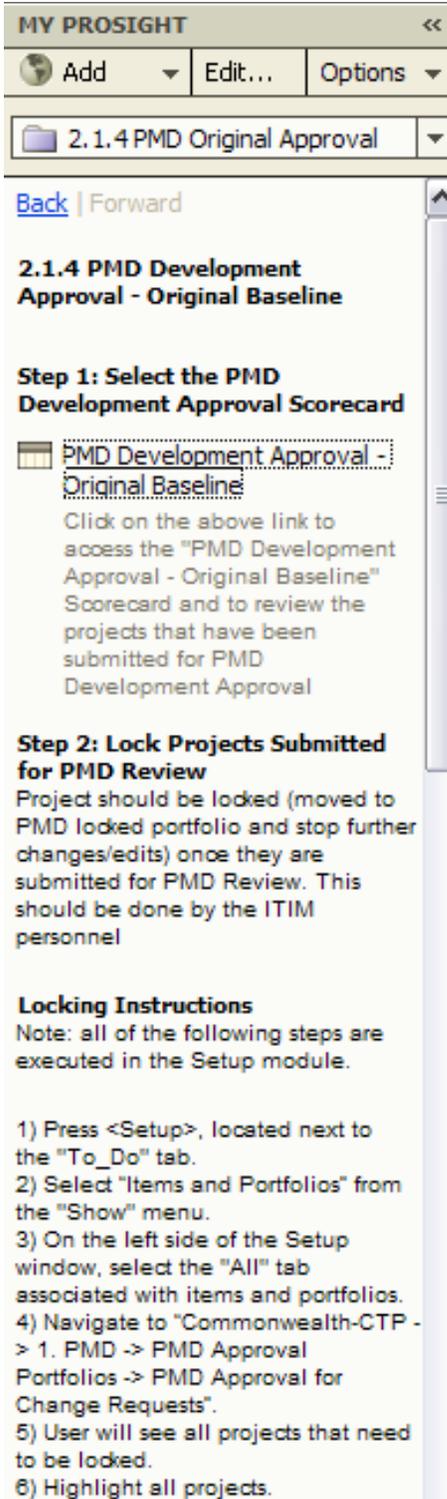
Sub Step 3: Review the Investment

This step contains three links allowing the user to view the Project information and render an approval

Step 9: PMD Prepares Balanced Scorecard Assessment Decision Brief

Once the Secretary has approved the project PMD will be notified there is a project that needs their attention. This sequence of events will be performed by PMD but is included here for informational purposes. If you wish to become familiar with the process PMD goes through please select the link shown below. Some of the links in ProSight may not open due to security role constraints.





Sub Step 1: Select the PMD Development Approval Scorecard

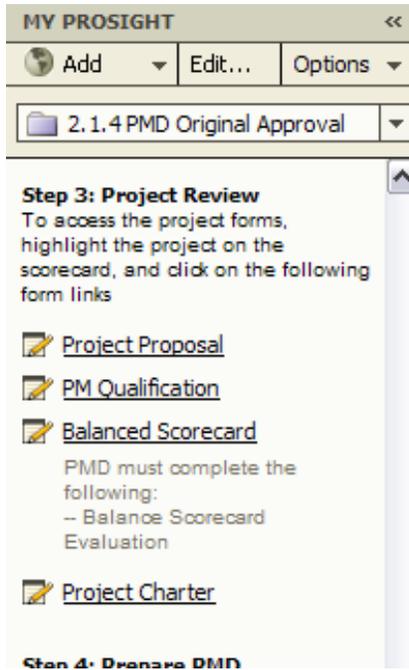
This step is to be performed by PMD only.

Sub Step 2: Lock Projects Submitted for PMD Review

This step is to be performed by PMD only. It is necessary to ensure the information doesn't change while PMD is reviewing it.

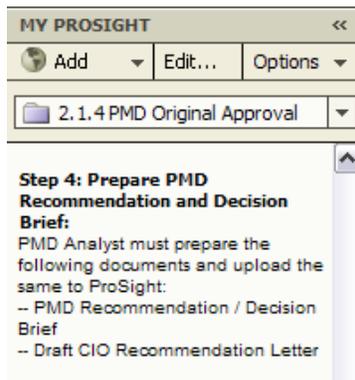
Sub Step 3: Project Review

This segment of the PMD review process consists of links to the mandatory forms for all projects. It allows PMD to review the information and make its recommendations.



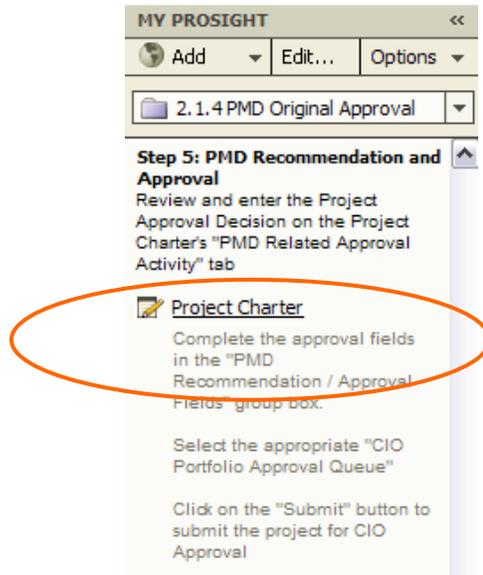
Sub Step 4 . Prepare PMD Recommendation and Decision Brief

The PMD Analyst must Process and upload the PMD Recommendation / Decision Brief, and the Draft CIO Recommendation Letter.



Sub Step 5: PMD Recommendation and Approval

Review and enter the Project Approval Decision on the Project Charter. The link shown below will take the PMD analyst directly to the tab to record their approval.



Sub Step 6: Send E-Mail to CIO

Send an Email to the CIO to communicate the submission of Project Proposal[s] and Project Charter[s] for approval.

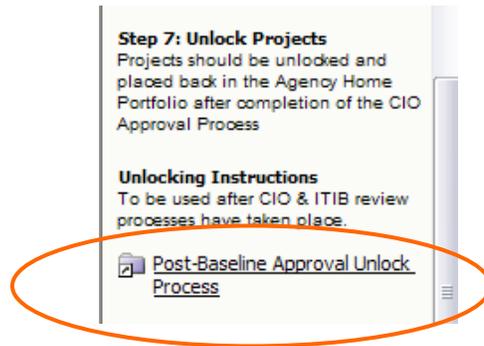


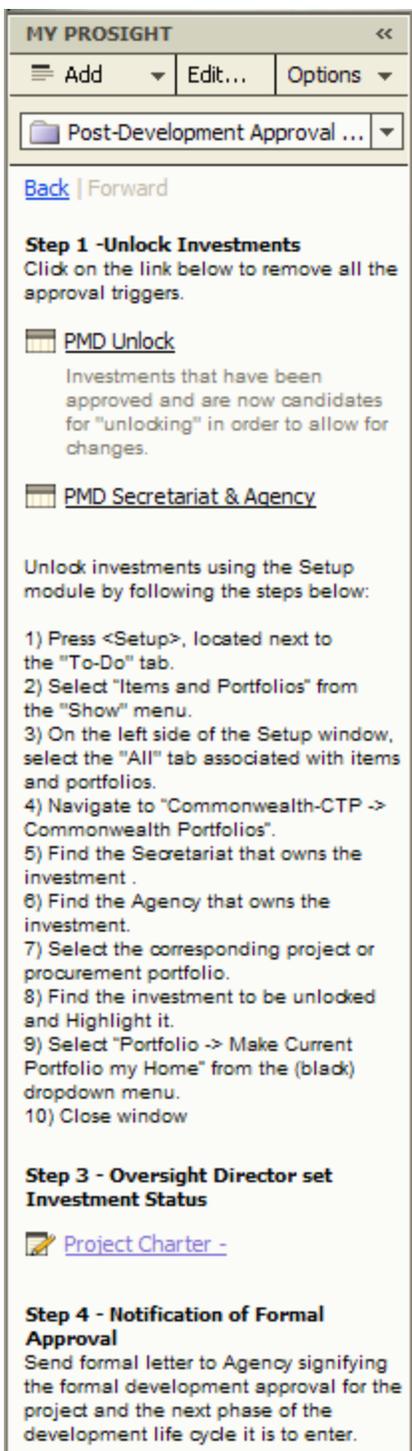
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For an introduction into how PMD records the Original Baseline please review Appendix A of this document.

Sub Step 7: Unlock Projects

Projects should be unlocked and placed back in the Agency Home Portfolio after completion of the CIO approval.





Lower Step 1: Unlock Investments

PMD Unlock - This link will take the user directly to the list of projects that can be unlocked so the PM can update if necessary.

PMD Secretariat & Agency – This link will take you directly to the Scorecard and portfolio that will allow the user to view those projects ready to be unlocked.

Lower Step 3: Oversight Director set Investment Status

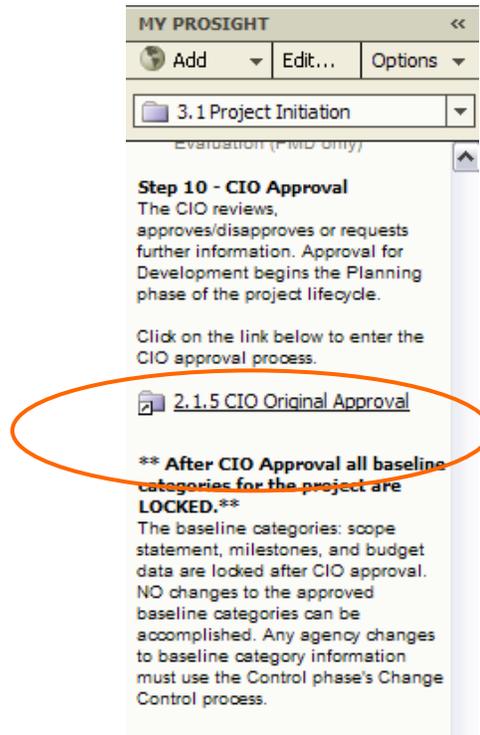
This link will take the user directly to the PMD approval tab to record the approval of the project.

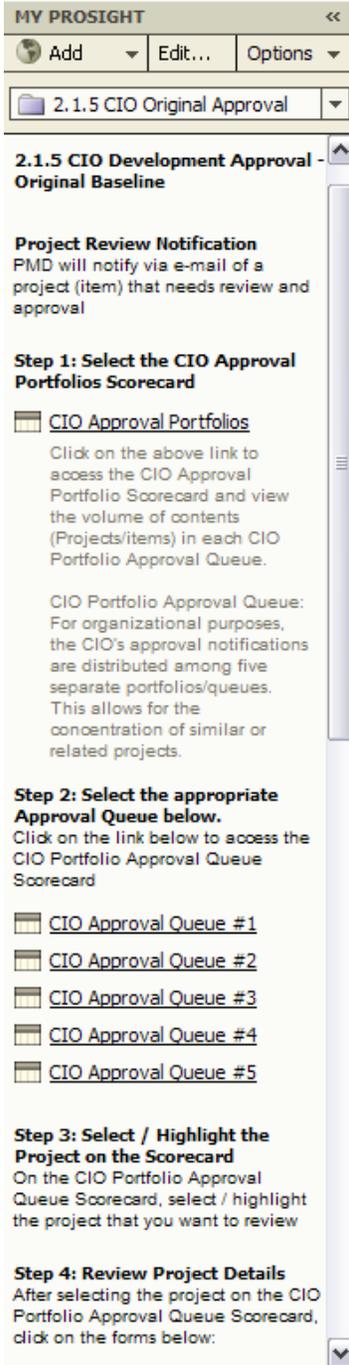
Lower Step 4: Notification of Formal Approval

Send formal letter to Agency signifying the formal development approval for the project and the next phase of the development life cycle it is to enter.

Step 10: CIO Approval

The link illustrated below will take you to the process sequence the CIO might use for an Original Approval. Please select the link illustrated below.





Lower Step 2: Select / Highlight the Project on the Scorecard

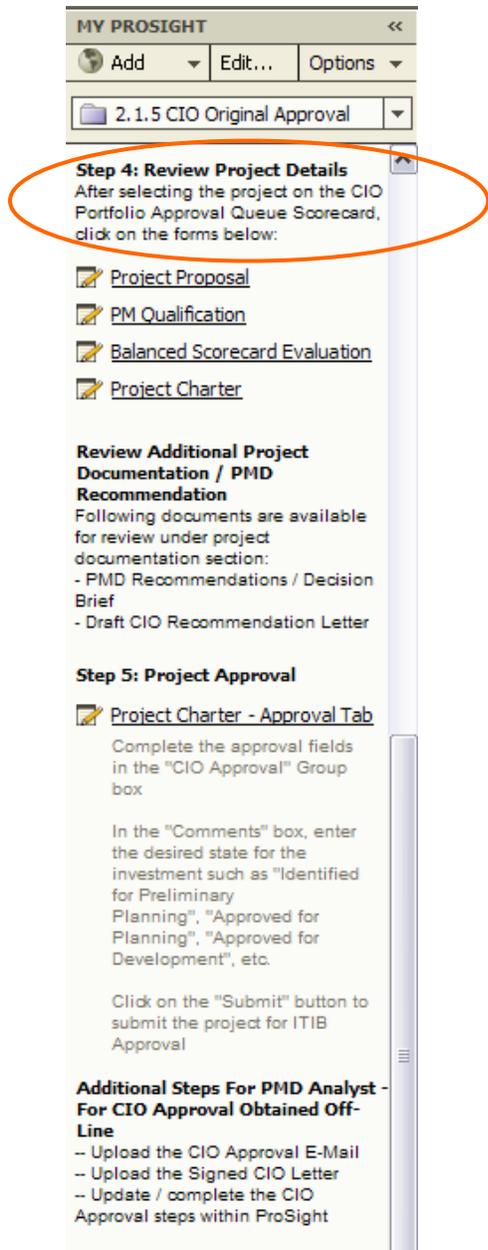
Here the user chooses the individual project they want to view.

Lower Step 3: Review Project Details

Now that you have selected an individual project, these links will facilitate the viewing of different project details using forms to display the data in context.

Lower Step 1: Select the appropriate Approval Queue below

This is a collection of links to individual lists used to organize the individual submissions to the CIO for approval. They are useful when organizing all related projects in one place.

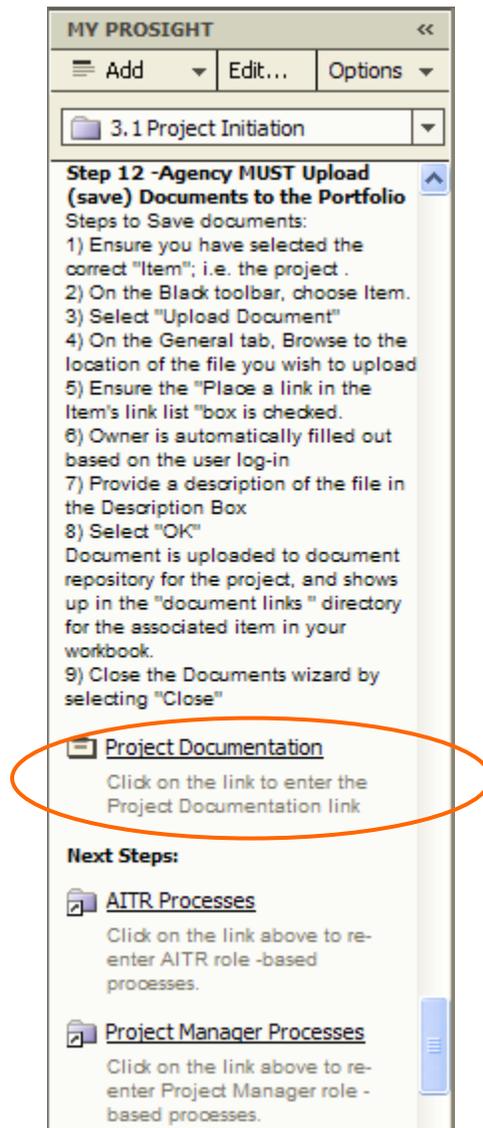


Lower Step 4: Project Approval

This link will take you directly to the approval tab where the CIOs approval is recorded.

Step 11 Agency MUST Upload (save) Documents to the Portfolio

The link illustrated below will take you to the workbook. Specifically to the links to documentation tab where users can upload entire documents or insert links to documents. Please be aware that when you insert a link the user will still need adequate permissions to view the document. Please keep in mind that section 6.1 of this document requires all documentation to be uploaded.



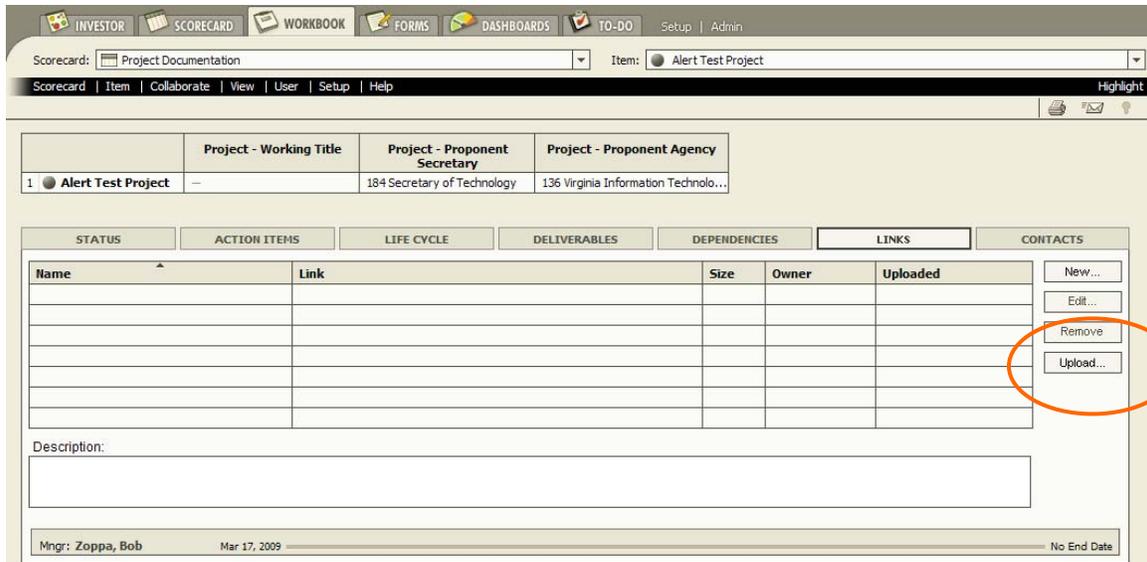
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AITR Processes - Please note the AITR Process link will take you to the root process of all the AITR specific process. The subject of this link is covered in a different training manual and is out of scope for this effort.

Project Manager Processes - Project Manager Process's link will take you back to the top of the Project Managers processes. We will continue with our example and not choose this option.

Lower Step 1: Upload a Document

The figure below shows the location of the  button. Please click on the button



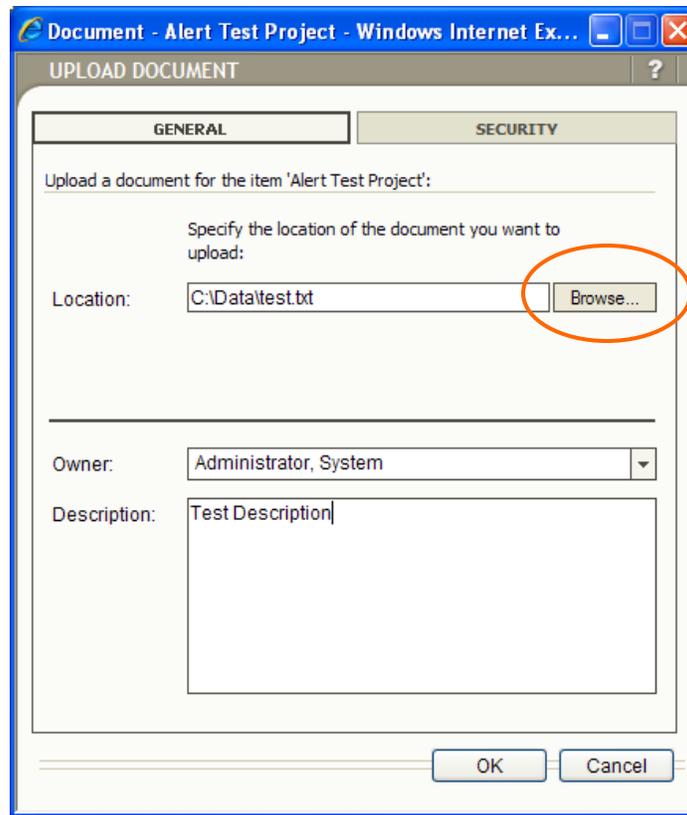
The screenshot shows a web application interface with a navigation bar at the top containing tabs for INVESTOR, SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO. Below the navigation bar, there are dropdown menus for 'Scorecard: Project Documentation' and 'Item: Alert Test Project'. A menu bar includes 'Scorecard | Item | Collaborate | View | User | Setup | Help'. The main content area features a table with the following data:

	Project - Working Title	Project - Proponent Secretary	Project - Proponent Agency
1	Alert Test Project	184 Secretary of Technology	136 Virginia Information Technolo...

Below the table, there are tabs for STATUS, ACTION ITEMS, LIFE CYCLE, DELIVERABLES, DEPENDENCIES, LINKS, and CONTACTS. The LINKS tab is active, showing a table with the following columns: Name, Link, Size, Owner, and Uploaded. To the right of the table, there are buttons for 'New...', 'Edit...', 'Remove', and 'Upload...'. The 'Upload...' button is circled in orange. Below the table, there is a 'Description:' field. At the bottom of the interface, there is a status bar showing 'Mgr: Zoppa, Bob', 'Mar 17, 2009', and 'No End Date'.

As shown in the figure below, click on the  button and navigate to the location of the file that is the focus of your attention. Once you've located the file please provide a short description or summary of its contents.

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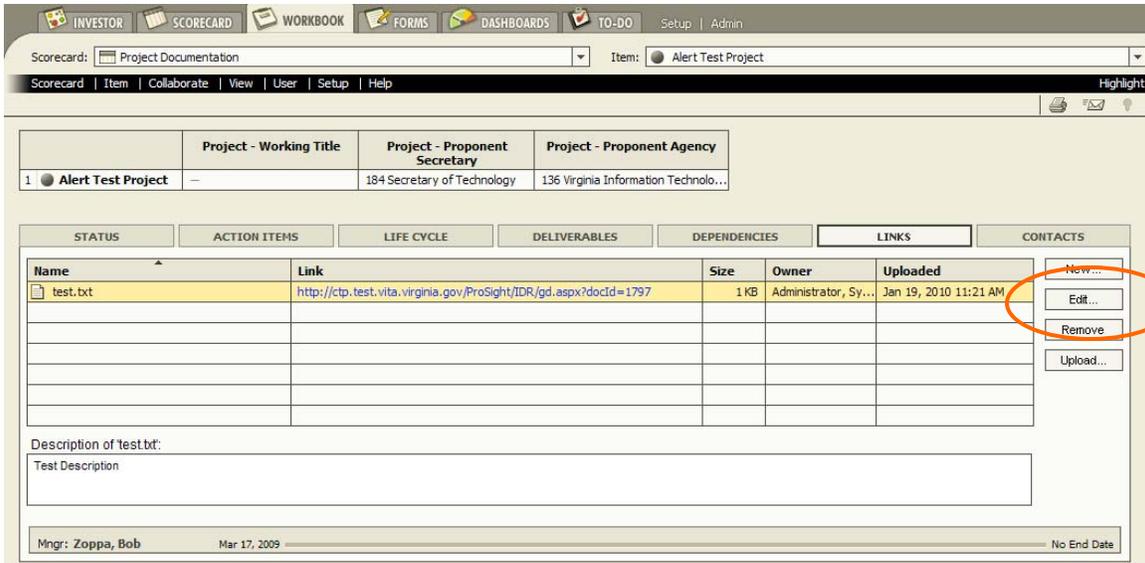


Press the  button when finished.

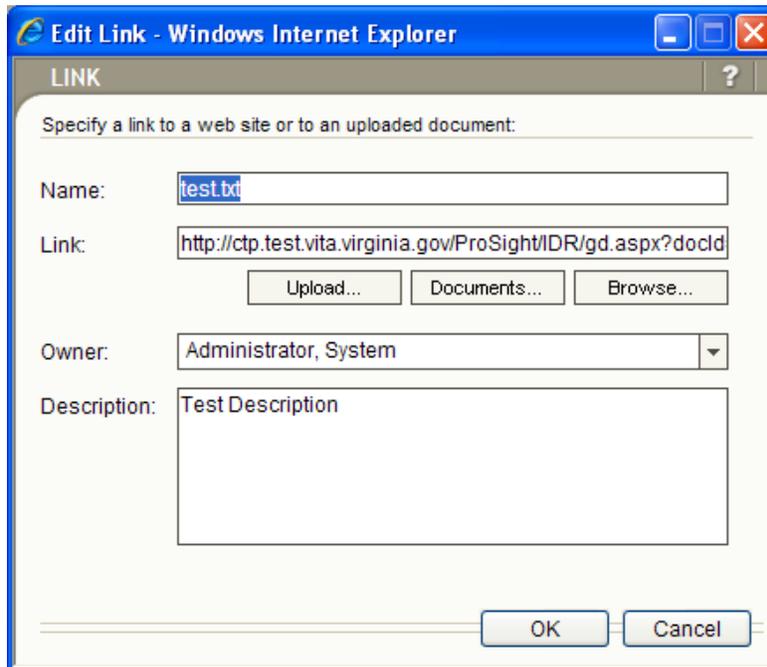
Lower Step 2: Edit a Document Link

The figure below shows the location of the  button. Please click on the button

PM Training – My Processes



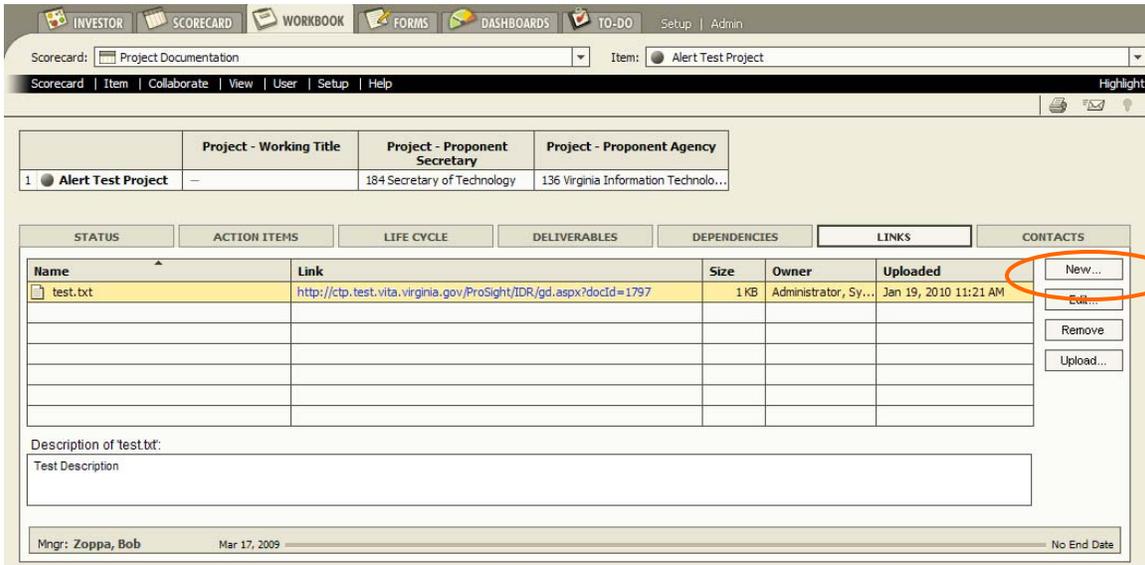
As shown in the figure below, you can edit description, a new document, show all the (like the workbook itself), or for a new document to Link.



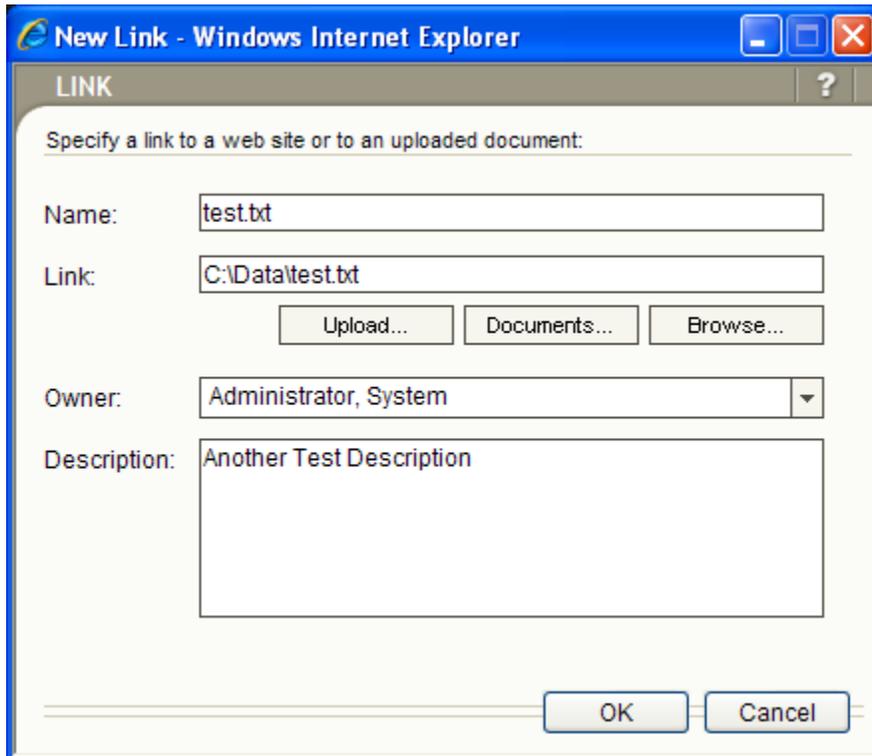
Press the button when finished.

Lower Step 2: Add a New Document (linking a document)

The figure below shows the location of the button. Please click on the button

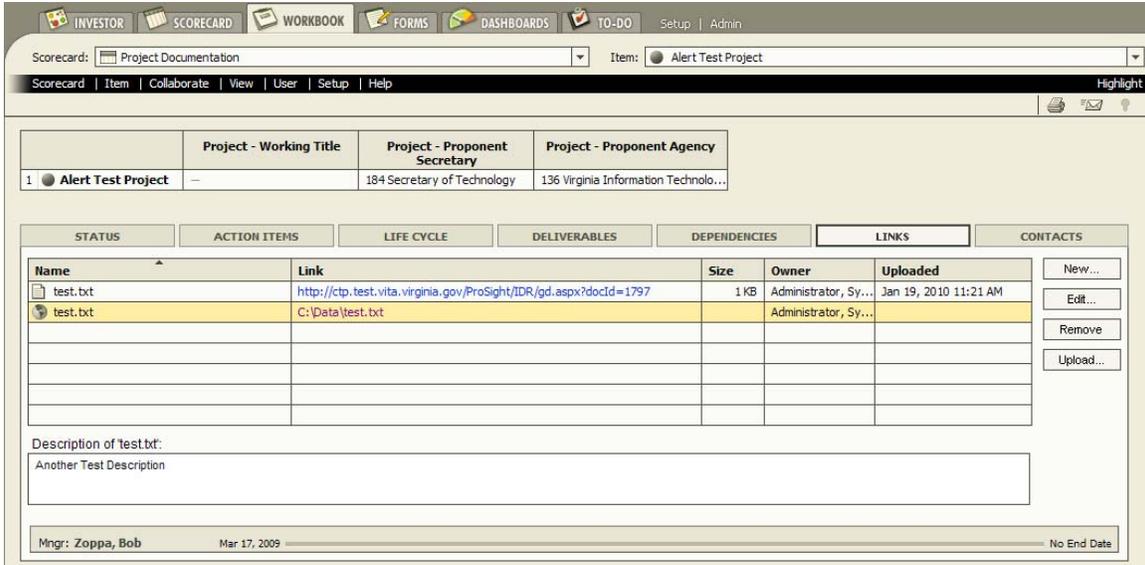


As shown in the figure below, you can edit description, a new document, show all the (like the workbook itself), or for a new document to Link.

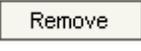


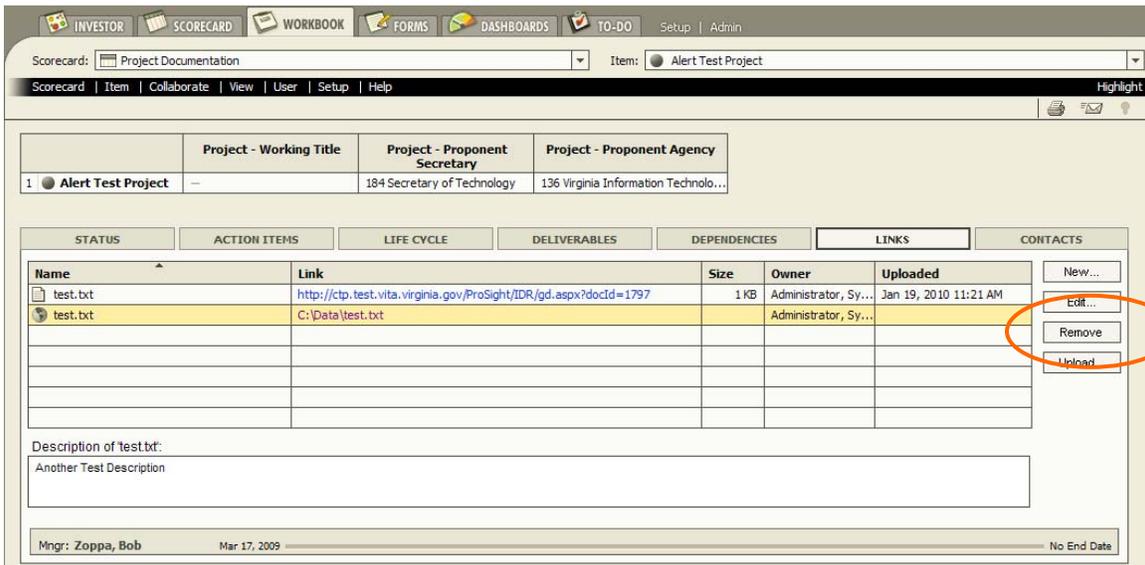
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Please view the figure below, it shows the results of our actions to this point. Note the second document is a link, it has not been uploaded. This is a good time to attempt to explain why links are not considered the preferred way of referencing a document. In this example the document is on your C: drive. No one else will be able to view this document even though the link is correct. Please keep in mind section 6.1 requires all documentation to be uploaded.



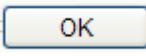
Lower Step 4: Remove a Document

The figure below shows the location of the  button. Please click on the button



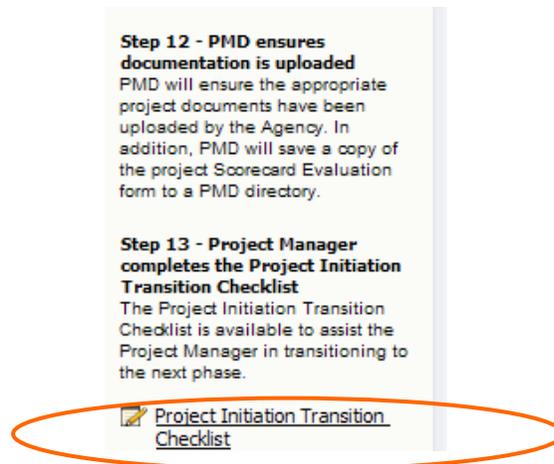
You will be notified of the impending deletion and given a chance to make sure this is the action you want to take.



Press the  button when finished.

Step 12 PMD ensures documentation is uploaded

This step is necessary for PMD to ensure the documentation has been loaded as required. Additionally, the link shown below will facilitate the user ensuring all necessary documentation has been completed within Primavera Portfolios.



Process 2 Project Planning (Detail) Phase:

The Project Planning phase begins after the approval of the Project Charter and concludes with approval of the Detailed Project Plan. A CIO approved Project Charter is required to start the Project Planning phase. The objective of this phase is to produce a CIO approved Detail Project Plan.

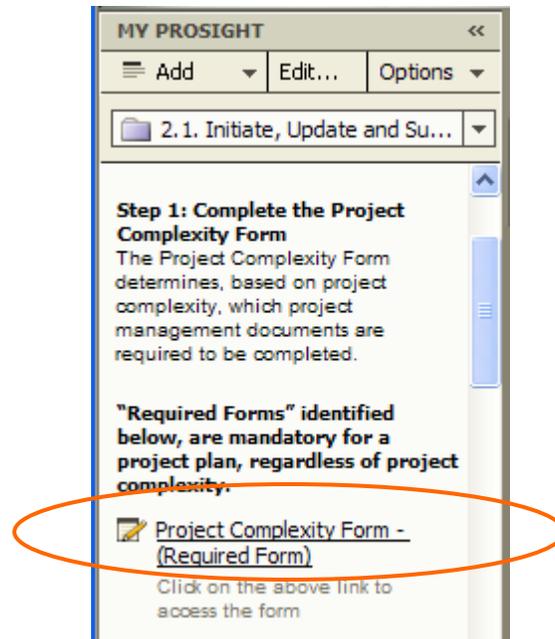


Sub-Process 2.1 Initiate, Update, and Submit – Detailed Project Plan

Project Managers are responsible to complete and submit the Detailed Project Plan and other supplemental plans.

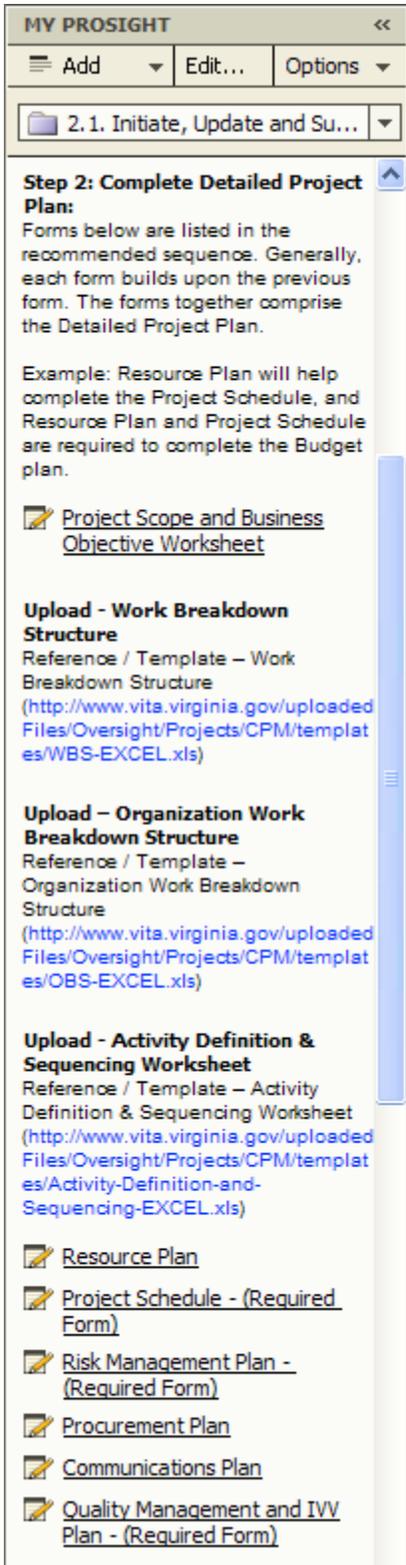
Step 1 Complete the Project Complexity Form

The link illustrated below will take you to the Project Complexity form where you will answer a few standardized questions allowing PMD to compare different projects against common criteria.



Step 2 Complete the Detailed Project Plan

The link illustrated below will take you to the Project Complexity form where you will answer a few standardized questions allowing PMD to compare different projects against common criteria.



Project Scope and Business Object Worksheet – this link will take you directly to the form and the user can review the information in the proper context.

Work Breakdown Structure - external web link to this optional template.

Organizational Work Breakdown Structure - external web link to this optional template.

Activity Definition and Sequencing Worksheet - external web link to this optional template.

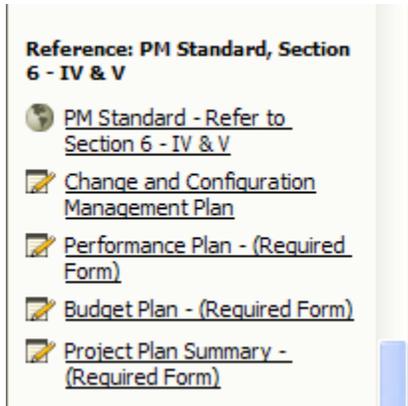
Resource Plan - This link will take you directly to the Resource Plan form to facilitate the review of the information.

Project Schedule - This link will take you directly to the Project Schedule form to facilitate the review of the information.

Risk Management - This link will take you directly to the Risk Management form to facilitate the review of the information.

Procurement Plan - This link will take you directly to the Procurement Plan form to facilitate the review of the information.

Quality Management and IVV plan - This link will take you directly to the Quality Management and IVV Plan form to facilitate the review of the information.



PM Standard - This link will take you directly to the standard as documented in the Library.

Change and Configuration

Management Plan - This link will take you directly to the Change and Configuration Management Plan form to facilitate the review of the information.

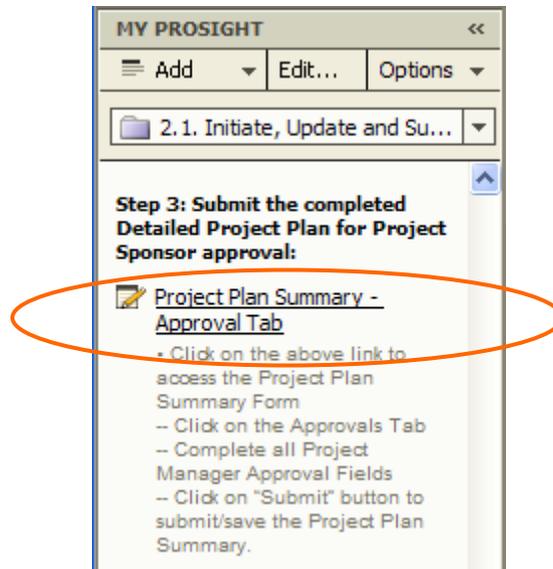
Performance Plan - This link will take you directly to the Performance Plan form to facilitate the review of the information.

Budget Plan - This link will take you directly to the Budget Plan form to facilitate the review of the information.

Project Plan Summary - This link will take you directly to the Project Plan form to facilitate the review of the information.

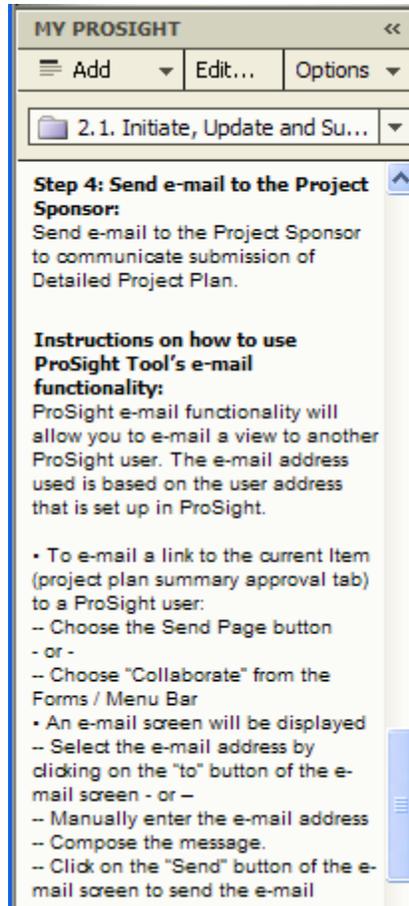
Step 3 Submit the completed Detailed Project Plan for Project Sponsor approval

The link illustrated below will take you directly to the Project Plan approval tab to facilitate the recording of approvals.



Step 4 Send e-mail to the Project Sponsor

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



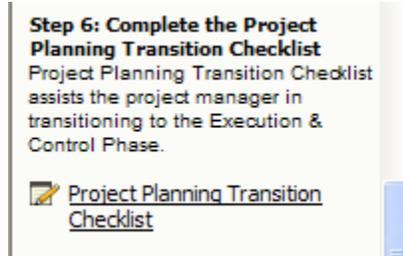
Step 5 Submit Project Plan to PMD

Once the Project Plan has been approved by IAOC, the PM should submit the same to PMD



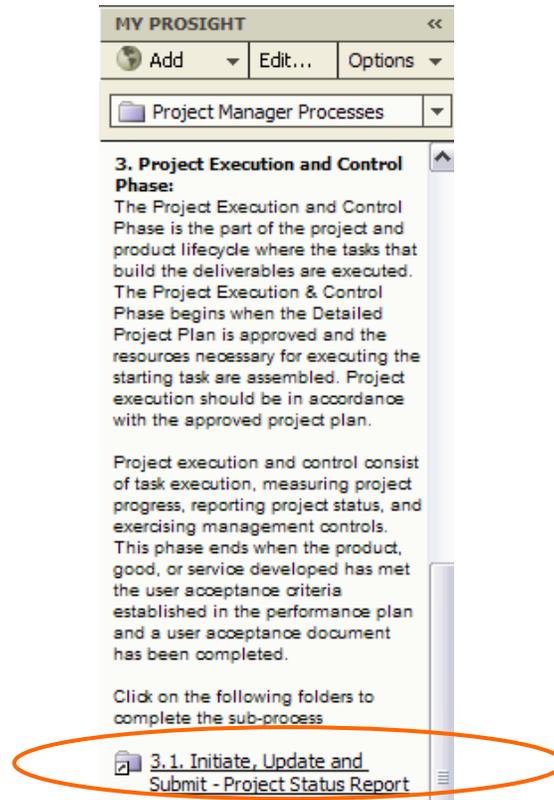
Step 6 Complete the Project Planning Transition Checklist

The link below will take you directly to the checklist to ensure the PM has provided all the necessary information to PMD and approval has been granted.



Process 3: Project Execution and Control Phase:

The Project Planning phase begins after the approval of the Project Charter and concludes with approval of the Detailed Project Plan. A CIO approved Project Charter is required to start the Project Planning phase. The objective of this phase is to produce a CIO approved Detail Project Plan. Please select the link as shown below.



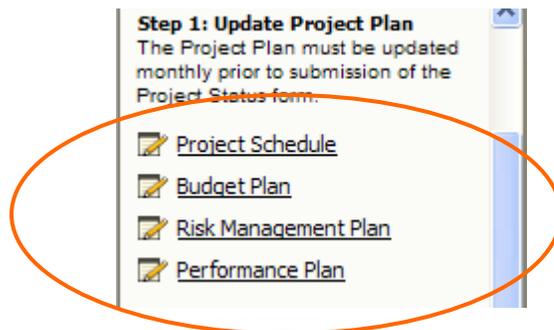
Sub-Process 3.1 Initiate, Update, and Submit – Detailed Project Plan

Project Status is required to be updated and reported on a monthly basis or the project status will be inaccurate. Please select the link shown below.



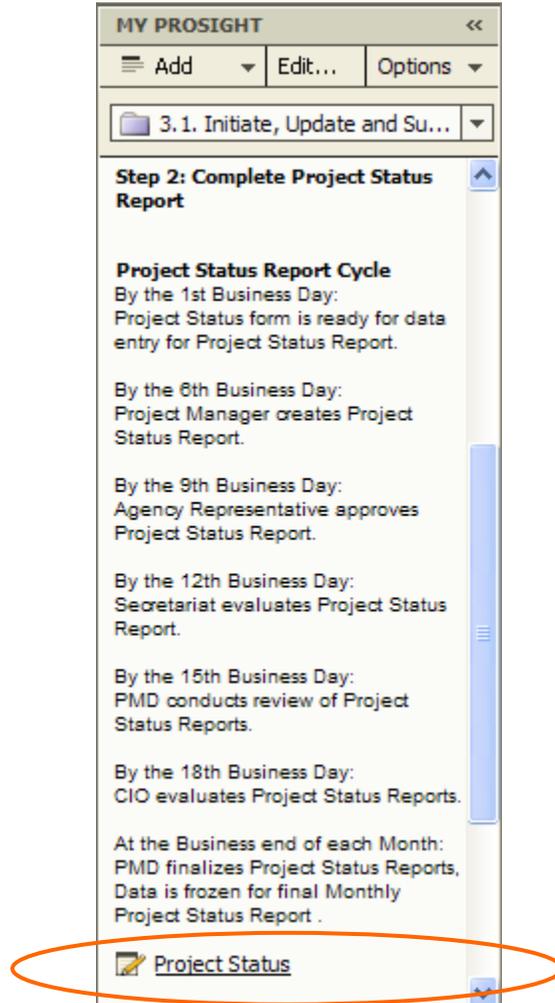
Step 1 Update Project Plan

As the project executes it will be necessary to update the Project Plan to reflect the current status of the project. The links below will take the PM to the individual forms, the names of which facilitate the updating of the Project plan.



Step 2 Complete Project Status Report

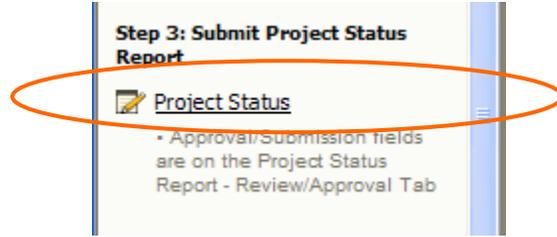
Every month the PM is responsible for updating the project plan and reflecting the update in the Status Report. The link below will take the PM directly to the Project Status form facilitating the update of each project in a standardized way ensuring compatibility with all Commonwealth of Virginia projects.



Step 3 Submit Project Status Report

The link below will take you directly to the Project Status Report and facilitate one last review before applying the approval.

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Sub-Process 3.2 Initiate, Update and Submit the Issue Management Log:

The Issue Management Log is updated and reported on an as-needed basis. The link below will take us to the process used to record an issue.



Step 1 Complete Issue Management Document Template

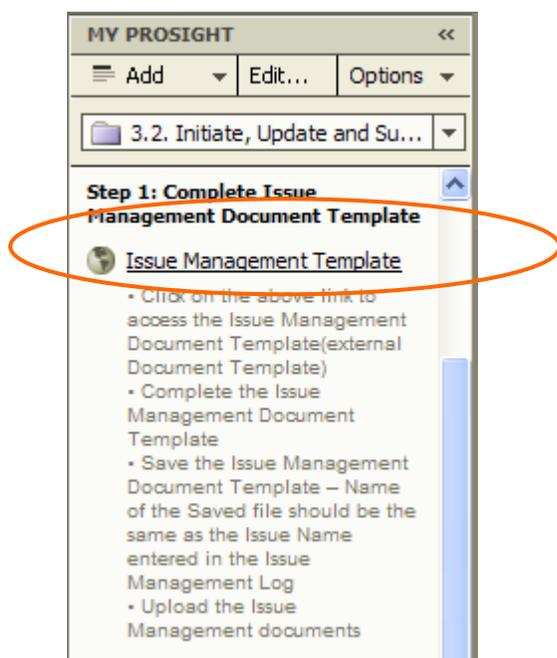
The link illustrated below will open up the standard Issue documentation template allowing the PM to record any issues. The PM will have to provide basic information about the project including:

- Project Title – The proper name used to identify this project;
- Project Working Title – The working name or acronym that will be used for the project;

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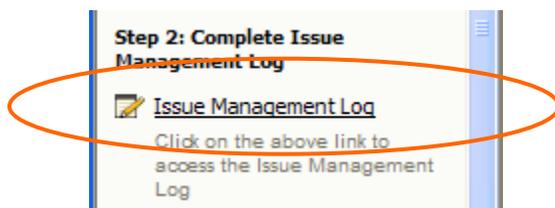
- Proponent Secretary – The Secretary to whom the proponent agency is assigned or the Secretary that is sponsoring an enterprise project;
- Proponent Agency – The agency that will be responsible for the management of the project;
- Prepared by – The person(s) preparing this document:
- Date/ Issue Number – The Date initiated and the Issue Number from Issue Log.
- Then go on to define the issue itself.

Please select the link shown below so we may continue with our example.



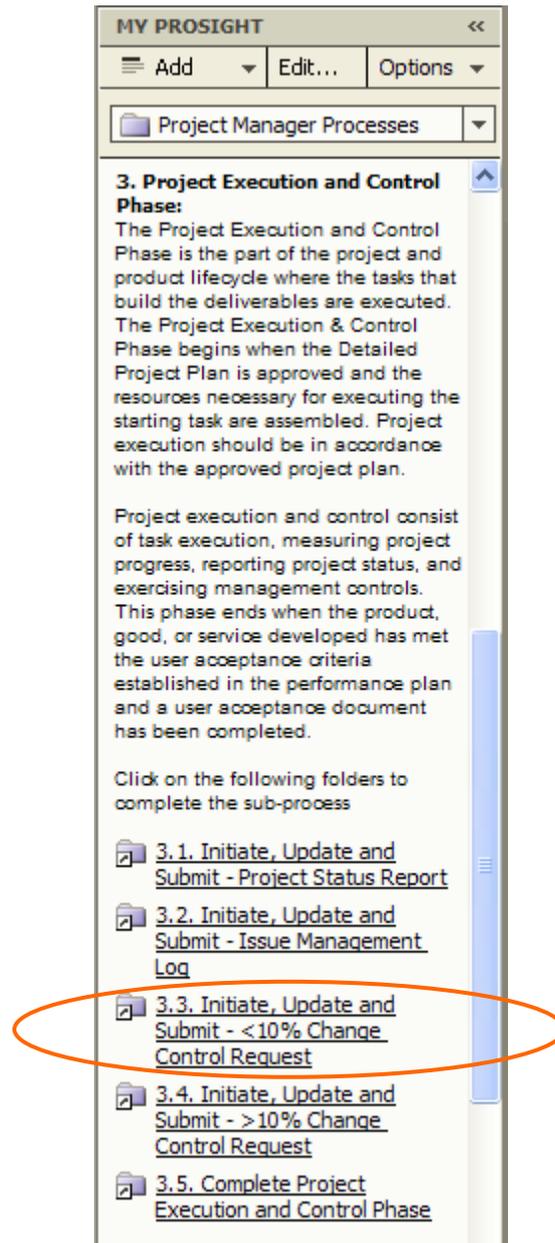
Step 2 Complete Issue Management Log

The link illustrated below will take you directly to the Issue Management Log form where the PM can upload the completed Issue Management Template.



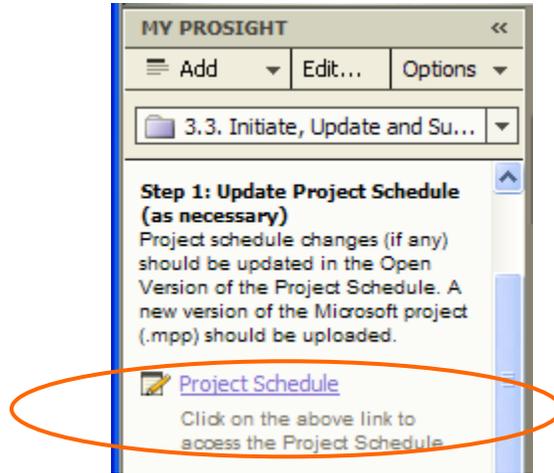
Sub-Process 3.3

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.



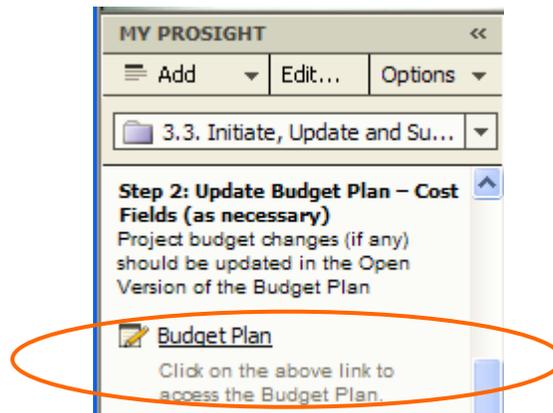
Step 1 Update Project Schedule

The link illustrated below takes you directly to the Project Schedule form allowing the PM to update the schedule to reflect real world impacts.



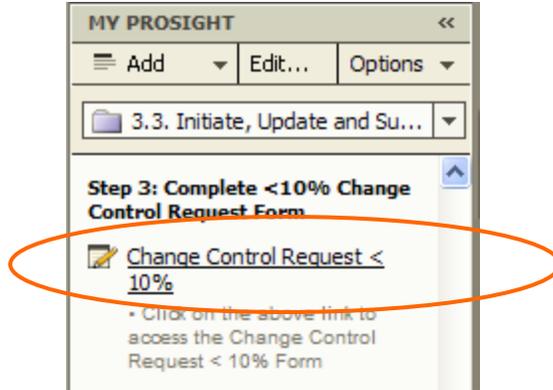
Step 2 Update Budget Plan – Cost Fields

The link illustrated below takes you directly to the Budget Plan form allowing the PM to update the current costs and budgeted cost to reflect real world impacts.



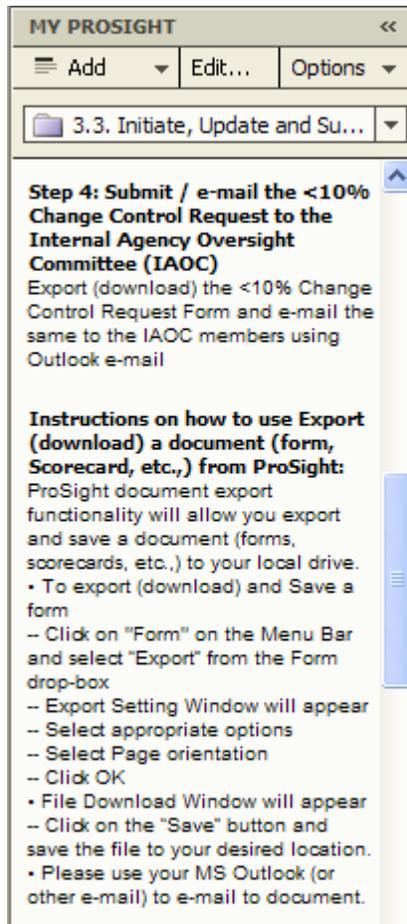
Step 3 Complete <10% change Control Request Form

The link illustrated below takes you directly to the Change Control Request < 10 % form allowing the PM to update the schedule to reflect real world impacts.



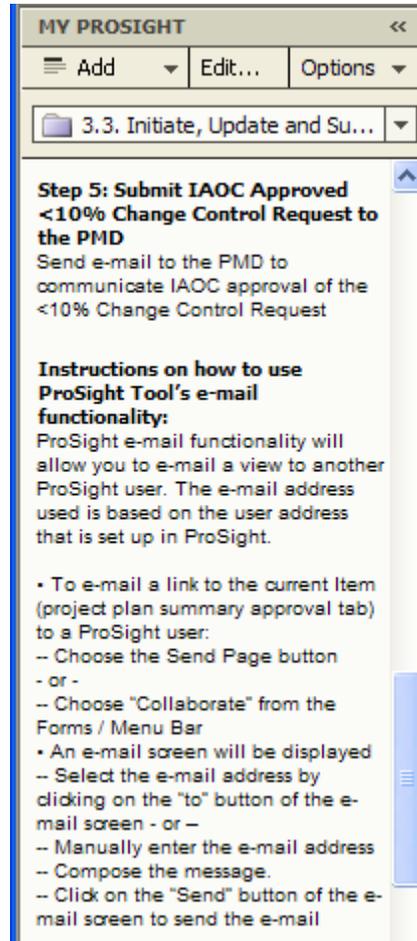
Step 4 Submit / e-mail the <10% Change Control Request to the Internal Agency Oversight Committee (IAOC)

The figure below displays the instructions the PM must follow to submit the change request and technical instructions for meeting that requirement.



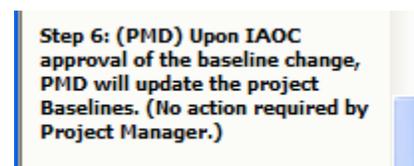
Step 5 Submit IAOC Approved <10% Change Control Request to the PMD

The figure below documents how a change request approval will be communicated to PMD.



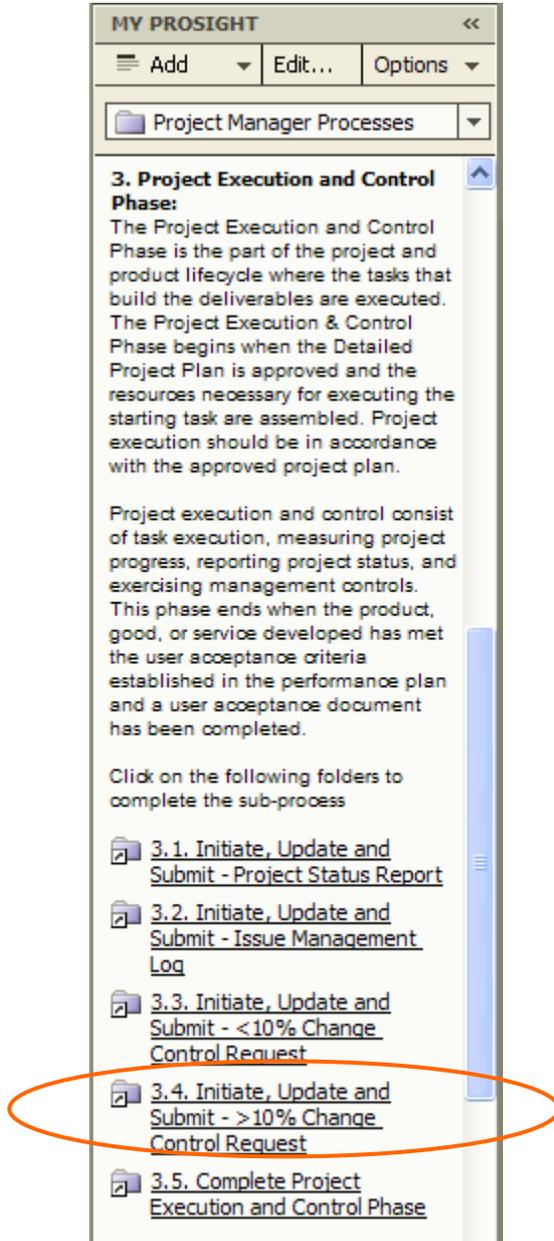
Step 6 Submit IAOC Approved <10% Change Control Request to the PMD

This section is provided only for continuity as there is PM action required.



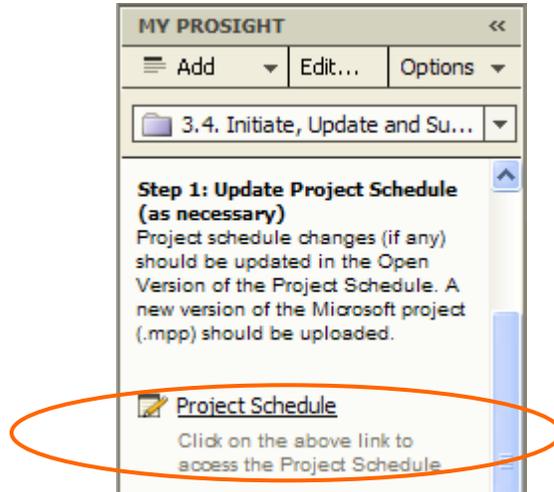
Sub-Process 3.4

The >10% cumulative; cost, schedule, and scope changes, from the last approved baseline, must be approved by the Internal Agency Oversight Committee (IAOC), Secretariat Oversight Committee, and the CIO. Scope changes are always considered a cumulative >10% change. To introduce ourselves to this process please select the link shown below.



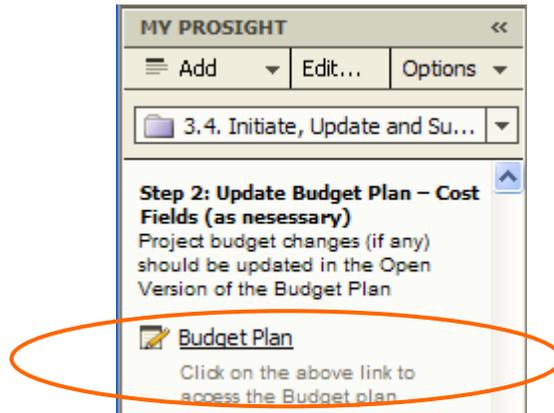
Step 1 Update Project Schedule

The link illustrated below takes you directly to the Project Schedule form allowing the PM to update the schedule to reflect real world impacts.



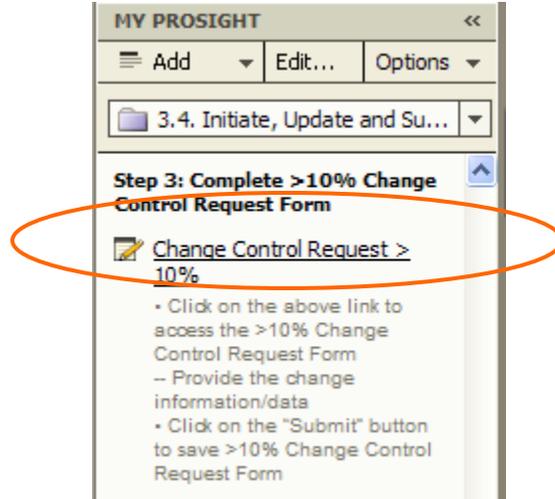
Step 2 Update Budget Plan – Cost Fields

The link illustrated below takes you directly to the Project Schedule form allowing the PM to update the schedule to reflect real world impacts.



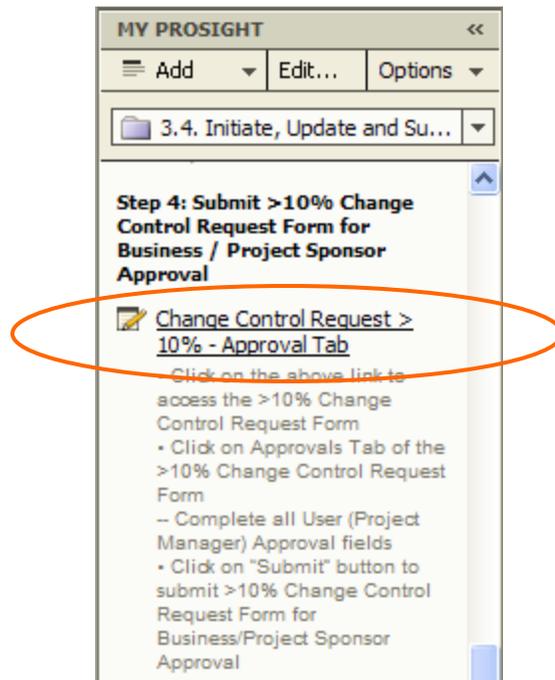
Step 3 Complete > 10% Change Control Request Form

The link illustrated below takes you directly to the Change Control Request > 10 % form allowing the PM to update the schedule to reflect real world impacts.



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

The link illustrated below takes you directly to the Change Control Request > 10



Step 5 Submit IAOC Approved >10% Change Control Request to the PMD

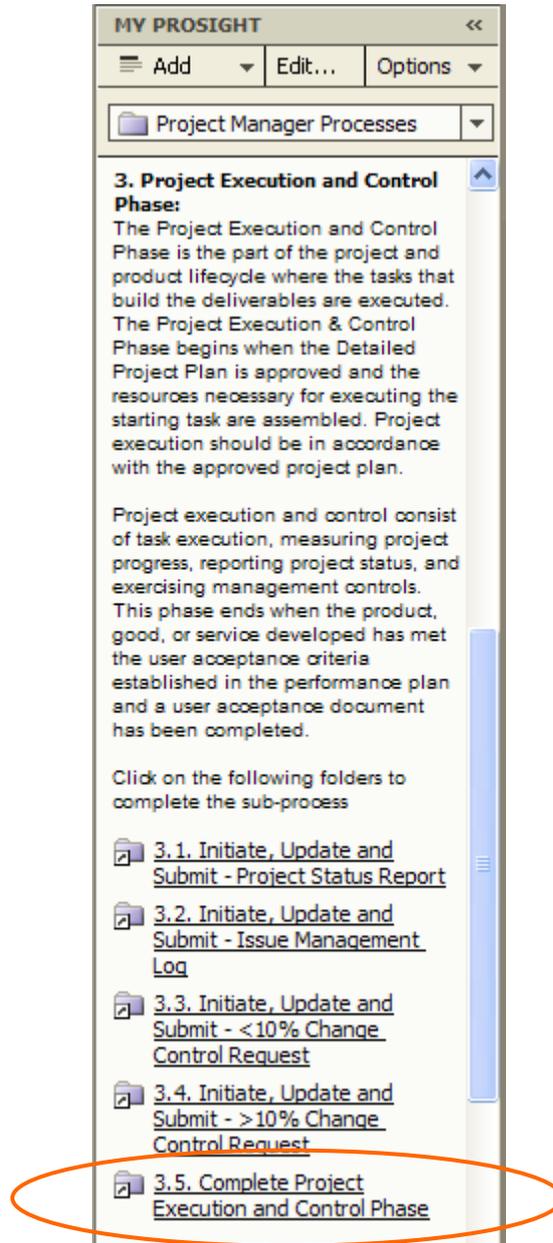
This section is provided only for continuity as there is PM action required.

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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

The execution and control phase, where the plan meets the world, is a volatile phase relative to the data being recorded in Portfolios. This phase has its own set of processes that support it. Please select the link as shown below.



Step 1 Complete the User Acceptance Report and Upload the same

The link shown below will take you directly to the standardized User Acceptance Report template (external web link) facilitating the PM and allowing the document to resemble the standard as required.



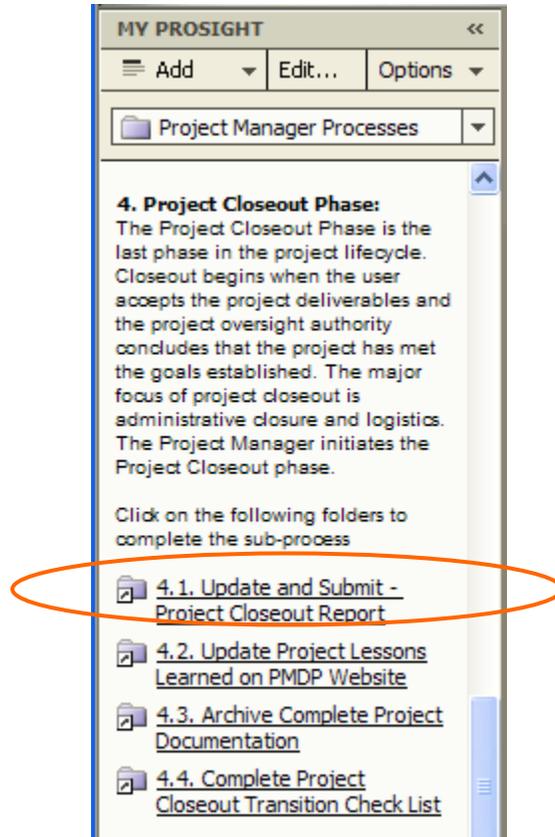
Step 2 Complete the Project Execution and Control Transition Checklist

The link illustrated below will take you directly to the Project Execution and Control Transition Checklist, facilitating the PM in ensuring all the necessary documentation has been completed.



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 Initiate, Update, and Submit – Detailed Project Plan

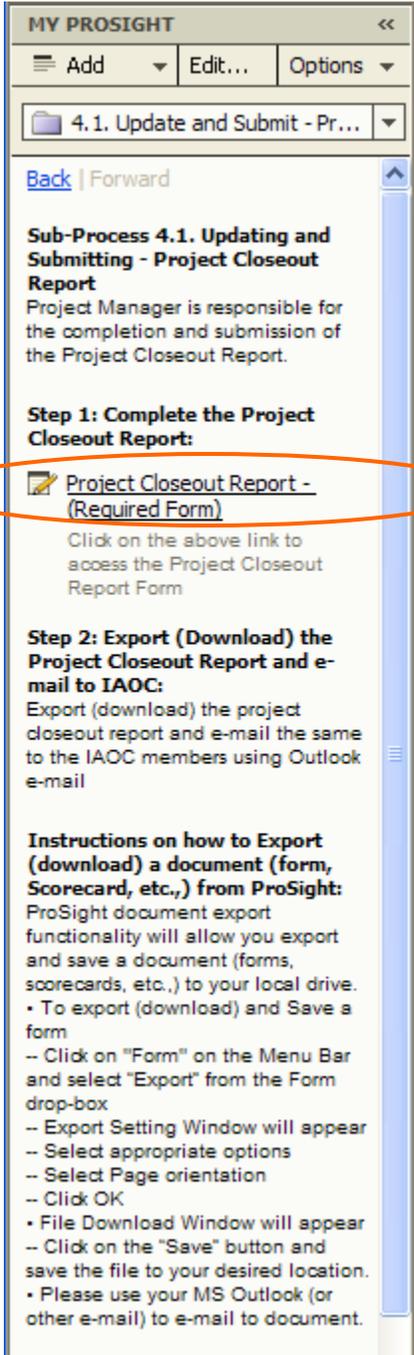
The project manager is responsible for compilation and submission of the project closeout report. The process steps facilitating this activity are shown in the figure below.

Step 1 Complete the Project Closeout Report

As shown in the figure to the left, this link will take you directly to the Project Closeout Report. Allow the PM to review the existing information and provide any additional information as necessary.

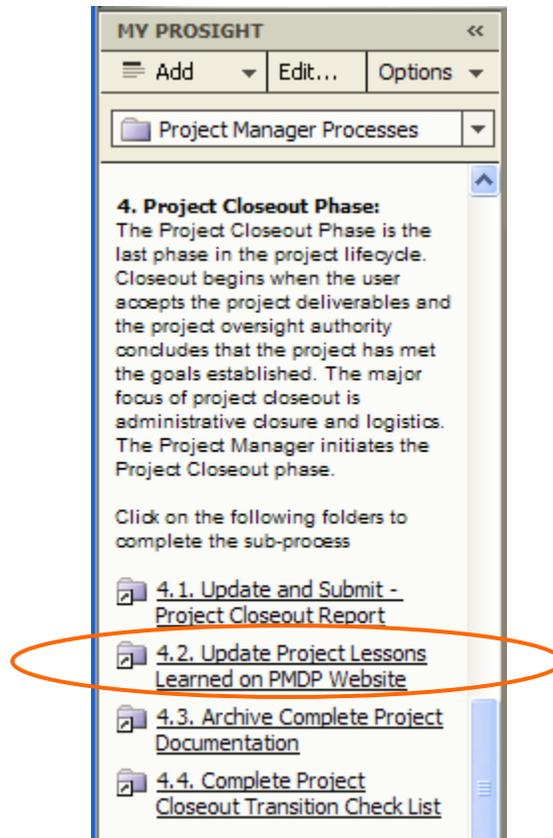
Step 2 Export the Project Closeout Report and e-mail to IAOC

In this step the PM exports the form into a Word document and e-mails it to IAOC for review and comment. Technical instructions have been provided to facilitate this operation.

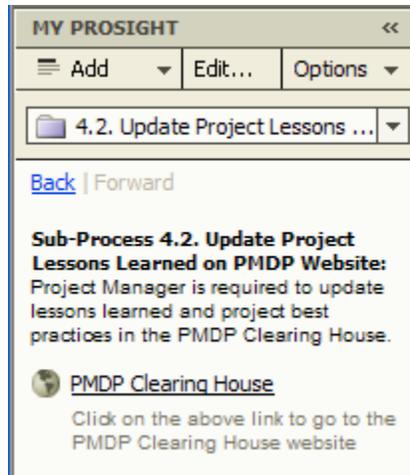


Sub-Process 4.2 Initiate, Update, and Submit – Detailed Project Plan

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

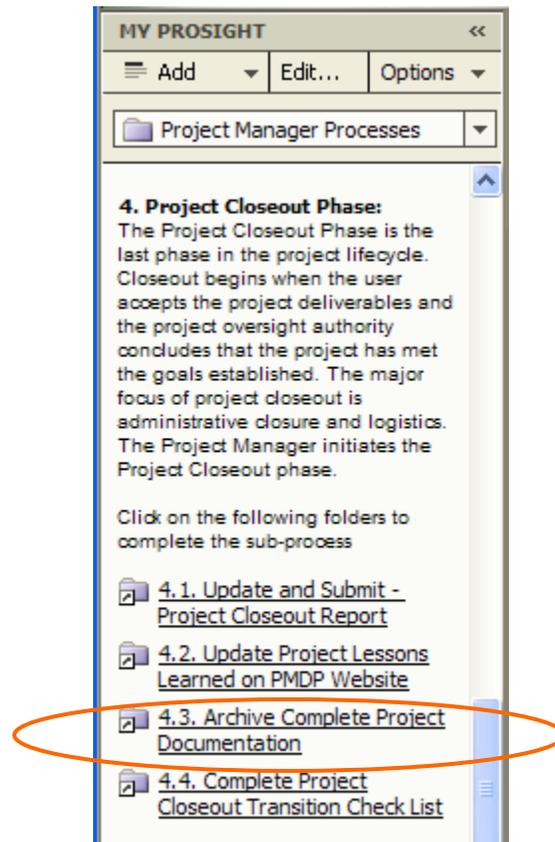


This sub-process consists of a single link as shown in the link below. It will allow the PM to update lessons learned and best practices and serves as a common data store for all PMs.

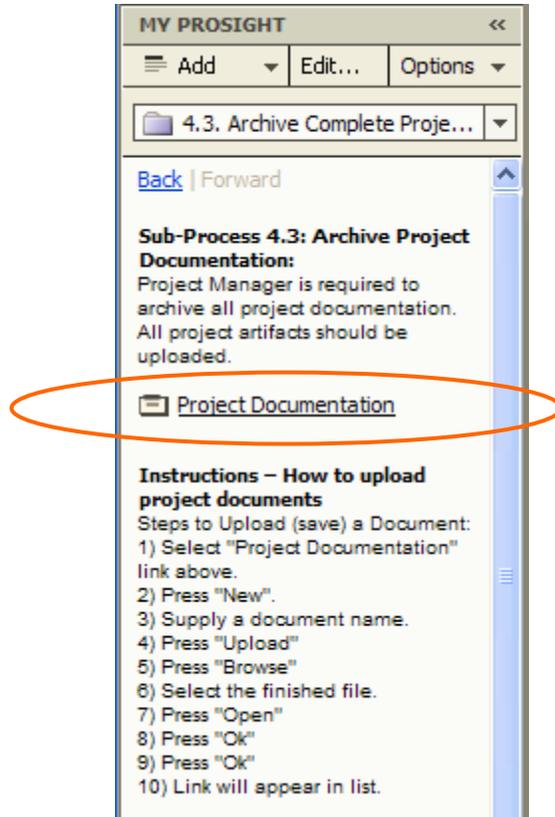


Sub-Process 4.3 Archive Complete Project Documentation

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



This sub-process consists of a single link as shown below. The link will take you to the Workbook, thereby facilitating the PM in uploading any finalized documentation prior to closing the project.



Sub-Process 4.4 Archive Complete Project Documentation

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

PM Training – My Processes

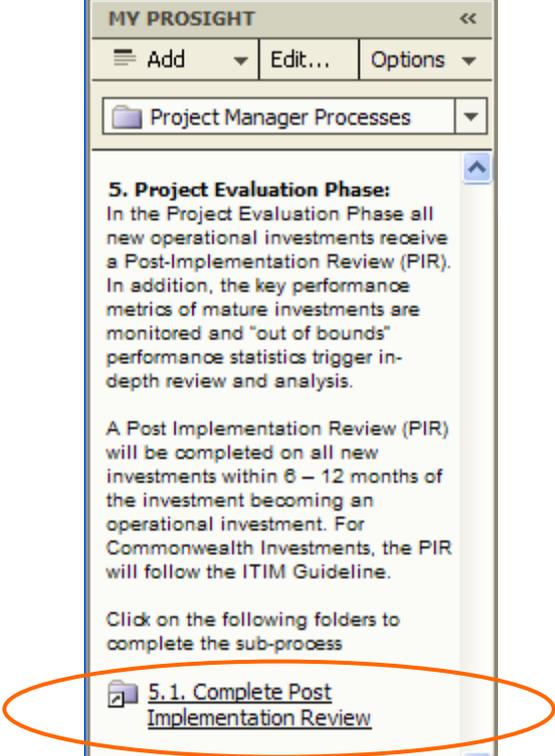


The figure below shows a link that will take you directly to the Project Closeout Transition Checklist, facilitating the PM in ensuring all the necessary documentation has been completed.

The screenshot displays the 'MY PROSIGHT' mobile application interface. At the top, there is a header with the title 'MY PROSIGHT' and a back arrow. Below the header is a navigation bar with three buttons: 'Add', 'Edit...', and 'Options'. A folder icon is followed by the text '4.4. Complete Project Close...' with a dropdown arrow. Below this, there are links for 'Back' and 'Forward'. The main content area features a section titled '4.4. Complete Project Closeout Transition Checklist'. The text below the title explains that the checklist is used to verify the completion of project tasks and acceptance criteria, and to address issue transfer. At the bottom of the content area, there is a checklist item 'Project Closeout Transition Checklist' with a pencil icon, which is circled in orange. Below this item, there is a link that says 'Click on the above link to go to the Project Closeout Transition Checklist'.

Process 5 Project Evaluation Phase:

The Project Evaluation Phase is the last phase in the ITIM lifecycle. Evaluation begins after Closeout when the user accepts the project deliverables and the project oversight authority concludes that the project has met the goals established.



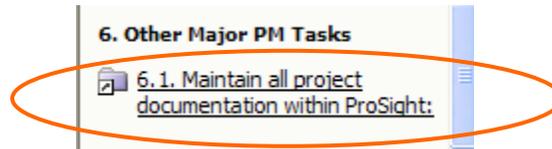
Sub-Process 5.1 Initiate, Update, and Submit – Post Implementation Review (PIR)

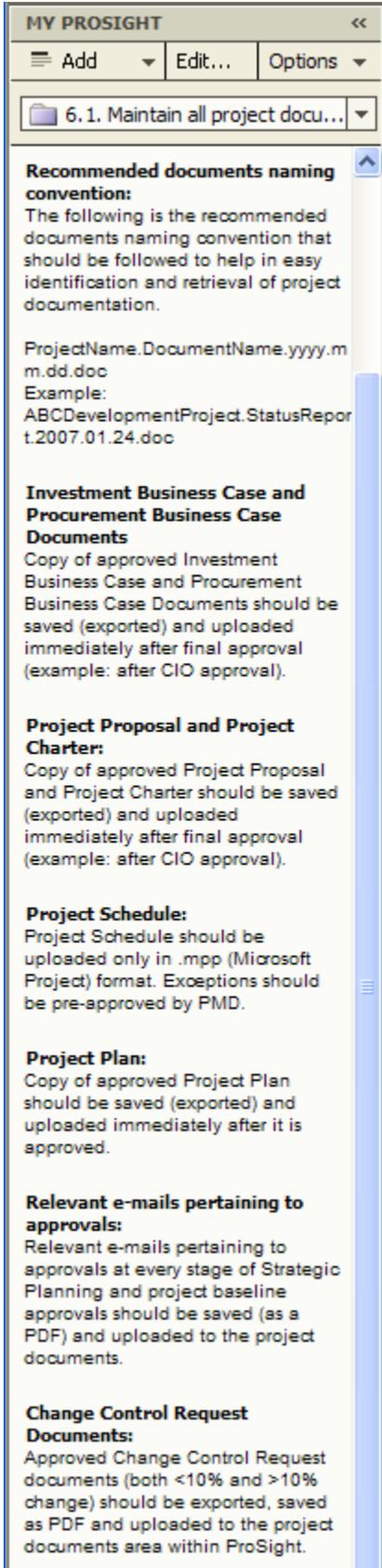
A Post Implementation Review and Report documents the successes and failures of the project deliverable. A Project Sponsor or Manager should direct the review process



Process 6 Other Major PM Tasks:

Project Documentation should be maintained and with the project. The figure below shows a link to the processes that walk the PM through this necessary part of the documentation storage process.





Sub-Process 6.1. Maintain all project documentation within Primavera Portfolios:

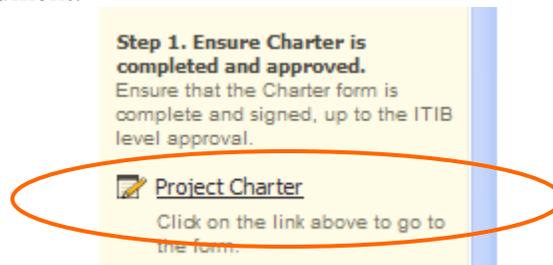
Project Documentation including the figure to the left should be maintained and uploaded to the project documents area within Primavera Portfolios.

(PMD Original Baseline Activities)

This section shows the individual steps PMD goes through to record a projects Original Baseline. This activity is transparent to the PM or any other user.

Step 1: Ensure Charter is completed

The figure below contains a link that will take the user to the Project Charter facilitating the review of the document.



Step 2: Ensure Investment Approval Status is updated

The figure below displays the dialog in Primavera Portfolios to support this step.



Step 3: Set the Project Baseline

The figure below describes sub steps a through d, of the process PMD uses to record the Original Baseline. The Project Baseline Status Setup link below will take the user to the Baseline Status Setup form which the PMD Analyst uses to manually record (i.e. paste) the information the Project Manager has provided in the project initiation and planning phase documents. Additionally, a link to the Execution Estimate tab of the Project Proposal has been provided allowing the PMD analyst to copy the necessary information.

Step 3. Set the Project Baseline
Open the "PMD Project Baseline Status Setup" form to accomplish the following actions:

[PMD Project Baseline Status Setup](#)
Click on the link above to open the form.

a. The form is used to establish the "Original Approved" baseline - as well as the "Latest Approved" baseline. Both baselines need to be set for the first time. Subsequently, the "Latest Approved" will be updated using baseline control (<10% or >10% Change Control Requests) processes.

b. On the "Status Report - OA & LA Planned Costs" tab, update the "Development Approval Date:" field. Leave blank the "CIO Last Approved Baseline Change" and "IAOC Last Approved:" fields.

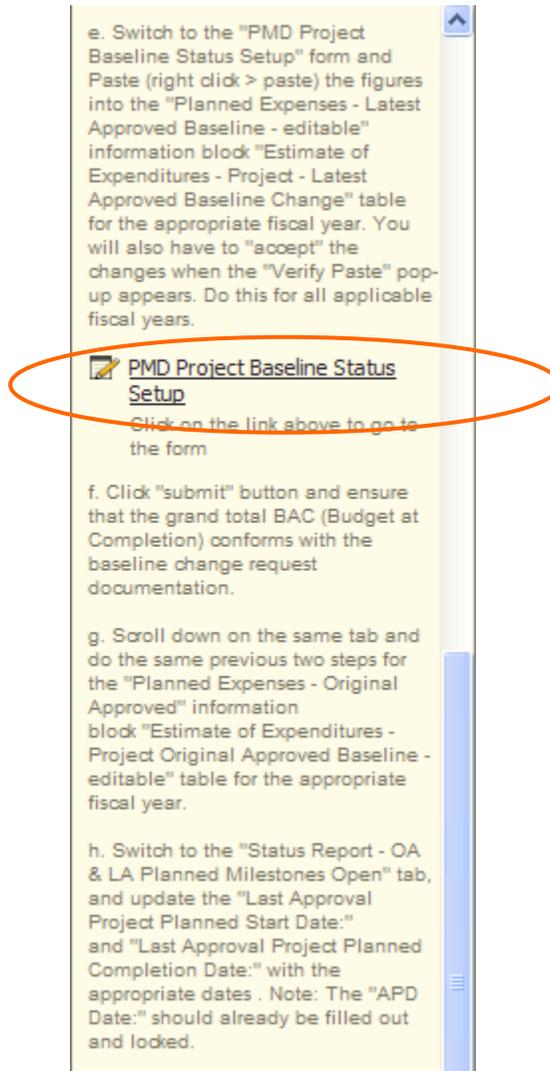
c. Go to the Project Proposal form, the "Execution Estimate" tab. Copy the budget numbers from the "Estimate of Execution Expenditures and Funding" table:

[Project Proposal](#)
Click on the link to open the form and "Execution Estimate" tab.

d. Select and Copy (right click > copy) the cells that have budget figures.

Step 3 (cont): Set the Project Baseline

This is a continuation of the previous paragraph, the figure below describes the sub steps e through h of the process PMD uses to record the Original Baseline.



e. Switch to the "PMD Project Baseline Status Setup" form and Paste (right click > paste) the figures into the "Planned Expenses - Latest Approved Baseline - editable" information block "Estimate of Expenditures - Project - Latest Approved Baseline Change" table for the appropriate fiscal year. You will also have to "accept" the changes when the "Verify Paste" pop-up appears. Do this for all applicable fiscal years.

[PMD Project Baseline Status Setup](#)
Click on the link above to go to the form

f. Click "submit" button and ensure that the grand total BAC (Budget at Completion) conforms with the baseline change request documentation.

g. Scroll down on the same tab and do the same previous two steps for the "Planned Expenses - Original Approved" information block "Estimate of Expenditures - Project Original Approved Baseline - editable" table for the appropriate fiscal year.

h. Switch to the "Status Report - OA & LA Planned Milestones Open" tab, and update the "Last Approval Project Planned Start Date:" and "Last Approval Project Planned Completion Date:" with the appropriate dates . Note: The "APD Date:" should already be filled out and locked.

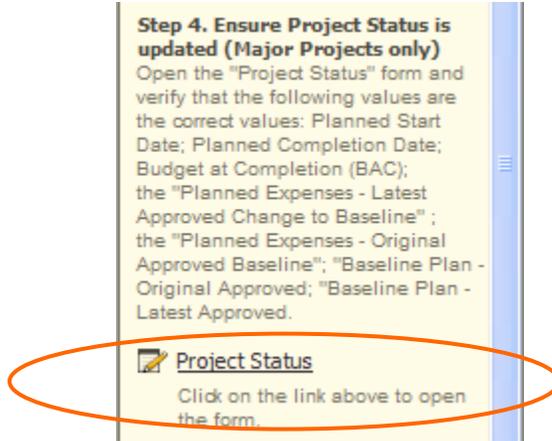
Step 3 (cont): Set the Project Baseline

This is a continuation of the previous paragraph, the figure below describes the sub steps i through k of the process PMD uses to record the Original Baseline.

- i. Unlike the steps to update the budget, you can update the schedule using information on the same tab. Copy (right click > copy) the new milestones and dates from the "Charter Milestones" information block, "Charter - CPOA Milestones" table (the last table on the form) and paste (right click > paste) into TWO tables: a) The "Original Approved Planned Schedule" information block, "Planned Milestones - Original Approval - editable" table, and b) the "Planned Milestones - Last Approval - editable" information block, "Planned Milestones - Last Approval - editable" table. You will also have to "accept" the changes when the "Verify Paste" pop-up appears.
- j. Save the form with the "submit" button.
- k. The remainder of the tabs require NO action:
 - "Project Description Statement"
 - "Performance Metrics - CPOA"
 - "Project Baseline - Performance - CPLA"
 - "Project Baseline - Scope - LA"
 - "Project Baseline - Scope - OA"

Step 4: Ensure Project Status is Updated

In this step the PMD Analyst will verify the project planned start and completion dates, budget at completion (BAC), and any other information consider of critical importance. The link in the figure below will take the user directly to the summary tab of the Project Status form allowing them to verify the information.



Step 5: Contact ITIM Office

This step ensures the ITIM office is notified as required.

