



Virginia Information Technologies Agency

Commonwealth Project Management using ProSight

Pat Reynolds

Project Management Division



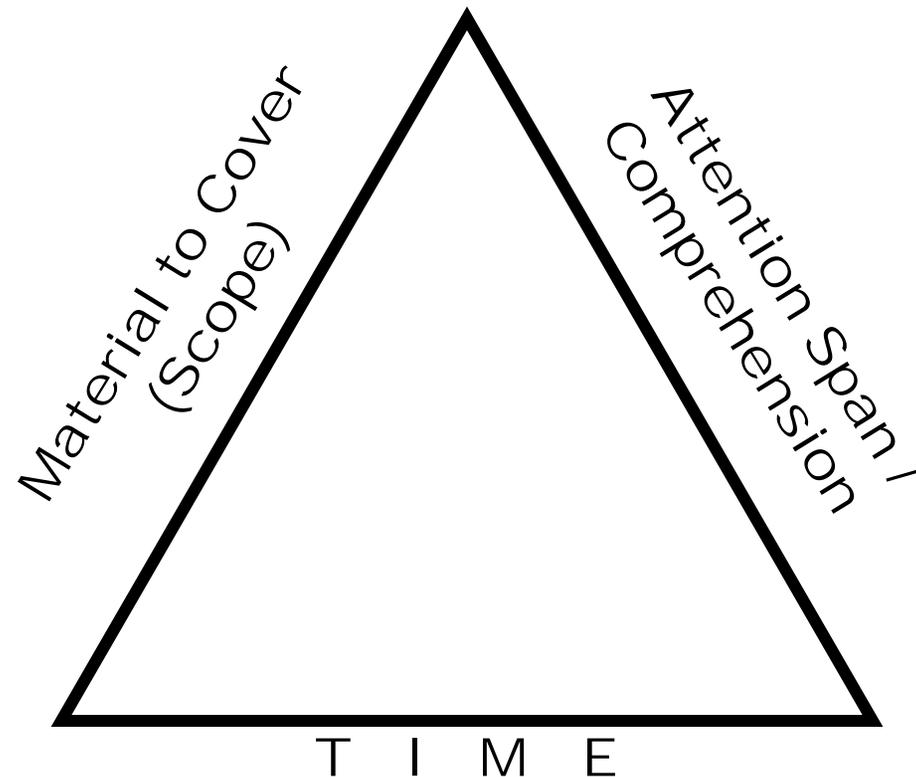


Welcome and Introduction

- Welcome!
- Pat Reynolds, PMD
 - I know what you are going through!
 - Believe it or not, PMD wants your project to be successful.
 - “IT is a means not an end.”
 - “IT Project Management is a means not an end.”
- Why we are here: What you need to know and do regarding IT project management in the Commonwealth using ProSight.



Triple Constraints *du jour*





Overview: Today we will...

- Demonstrate the PM processes and forms within ProSight
 - From start to finish (from a **Project Manager's perspective**)

- Demonstrate activities to prepare you to manage your project documentation:
 - Find your project
 - Enter minimum amount of data into key fields
 - Create your monthly project status report
 - Upload key project documents



Overview: Today we will NOT...

- Teach the Commonwealth Project Management Methodology
 - This is taught quarterly (Mandatory Training)
 - You have already attended the CPM lecture (day-long)
- Explain the definition of each field in ProSight
 - Because the definitions have not changed over time
 - Plus, there is built-in help available for each field in every form
 - However, we will alert you to peculiar differences between the old Word-based templates and the new ProSight forms.
- Demonstrate **every capability** of ProSight
 - Rather, you will learn just enough to do your job in ProSight

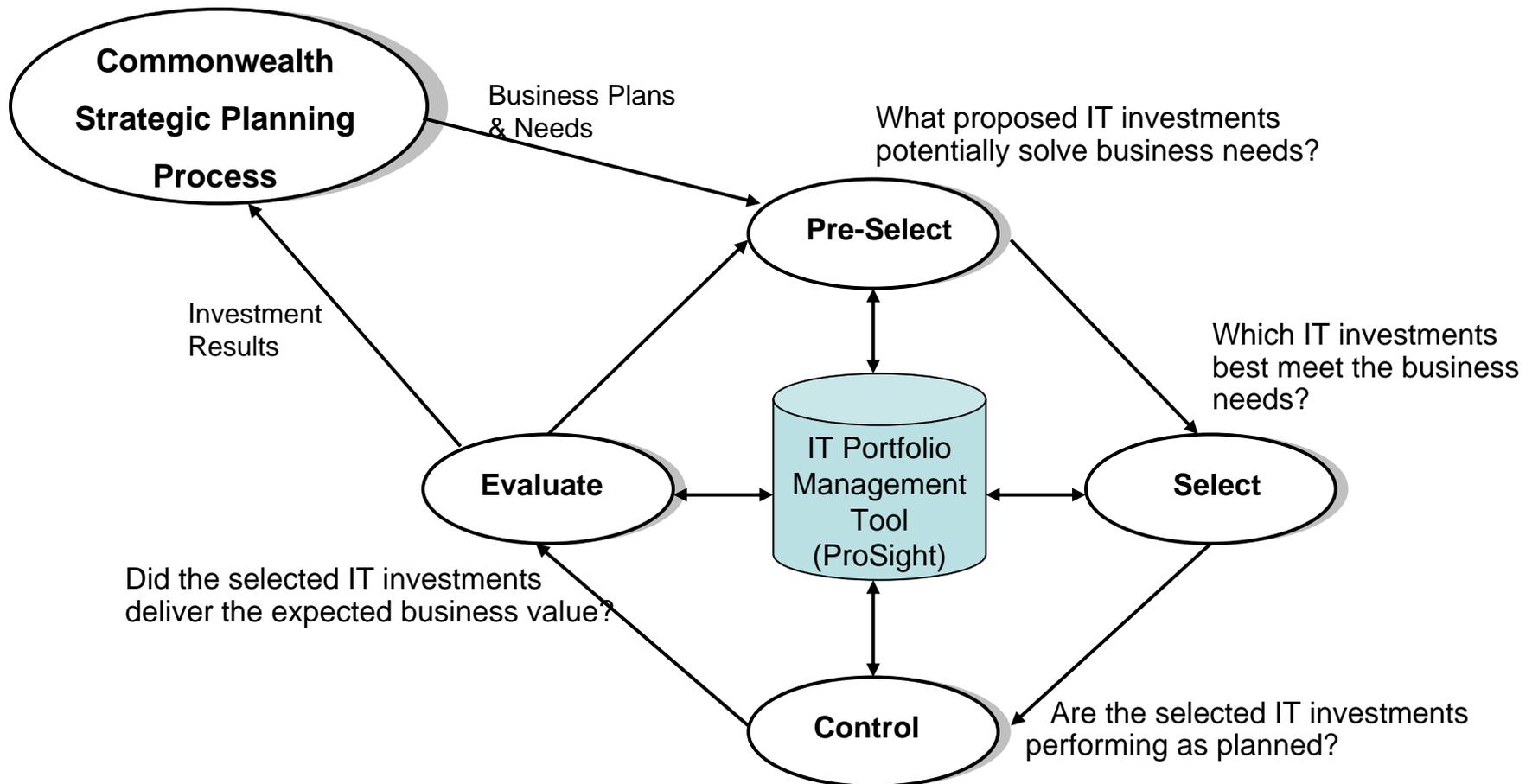


Class Objectives: Project Manager Processes using ProSight

- At the end of this training session, the PM will be:
 - Familiar with:
 - Orientation of PM processes in the ITIM lifecycle
 - ProSight orientation and navigation through the “My Portfolios” navigation pane
 - The integration of the ProSight tool, and the advantages of integration
 - Will be able to:
 - Find the assigned active project in ProSight
 - Review a minimum number of key fields in preparation for the first cycle of Status Reports
 - Upload a minimum number of key documents for your project
 - Will understand:
 - How to submit monthly project metrics into ProSight
 - Understand the change control process in ProSight



ITIM Process Overview





Commonwealth Technology Portfolio

- A repository for agency information technology (IT) investments in the Commonwealth of Virginia.
- The Portfolio organizes agency inventory information from a business-driven perspective.
- Information from the system will be used to:
 - Support both Commonwealth and agency IT strategic planning
 - Capture a current or "As Is" view of the Commonwealth IT architecture
 - Facilitate migration planning towards a conceptual or "To Be" Commonwealth IT architecture
 - Allow agencies to share information about their current portfolios
 - Better inform the overall Commonwealth IT management process.



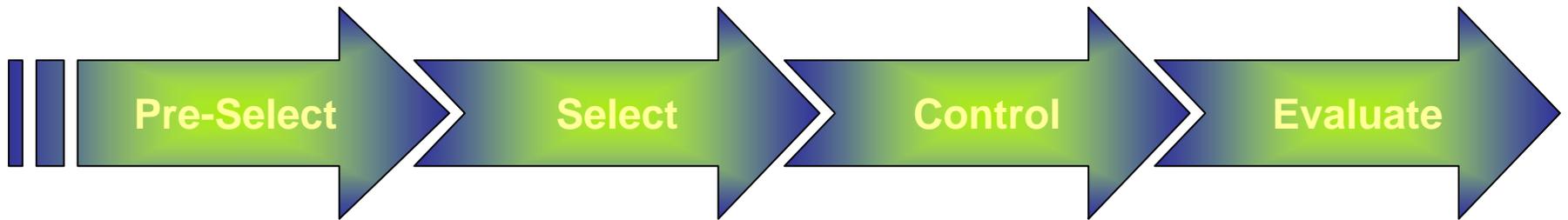
Comparison: Major vs. Non-major Projects

- Major IT Project:
 - Mission Critical - or -
 - Has Statewide Application - or -
 - Estimated cost > \$1,000,000

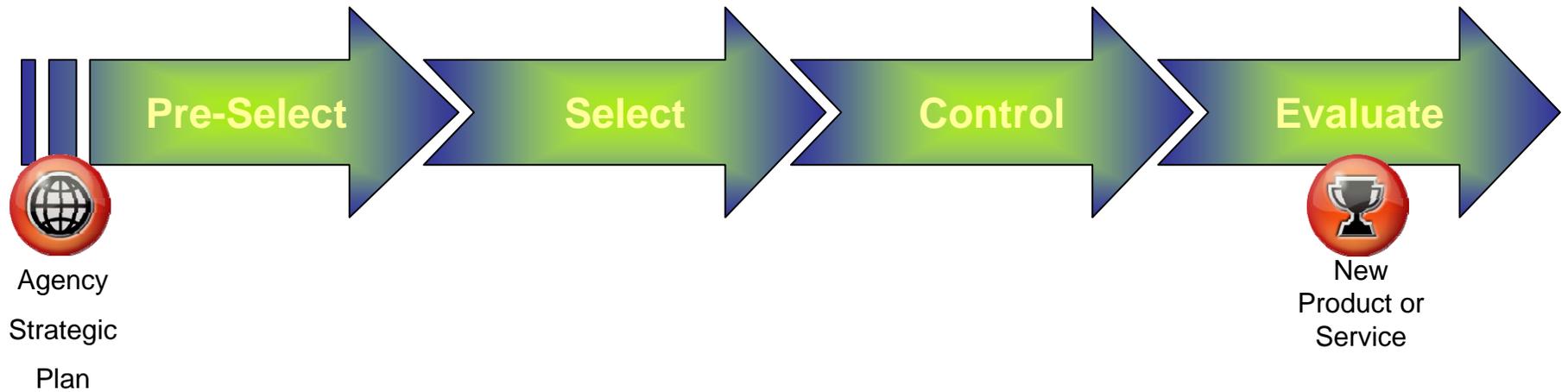
- Non-major IT Project
 - NOT Mission Critical - and -
 - Does NOT have Statewide Application - and -
 - Estimated cost \leq \$1,000,000

- PMD verifies that the proposed project is correctly categorized as part of the PMD Development Approval recommendation to the CIO.

ITIM Lifecycle



ITIM Lifecycle





Overview: ProSight PM Processes

Events leading up to "Approved for Planning"

- **Pre-Select Phase:**
 - (Deliverable: Project IPP-Identified for Preliminary Planning)
- **Select Phase:**
 - (Deliverable: Project APP-Approved for Planning)

Project Manager Processes in the **Control Phase:**

- (Prerequisite: "Approved for Planning" project)
- **Initiation** Process
 - (Deliverable: ITIB-approved Project Charter)
 - Project now has "Development Approval"
- **Planning** Process
 - (Deliverable: CIO-approved Detailed Project Plan)
- **Execution & Control** Process
 - (Deliverable: User Acceptance Document completed)
- **Closeout** Process
 - (Deliverable: Project Closeout Report)

We will focus on these areas, because we are focusing on the PM role.

Post-Closeout Procedures

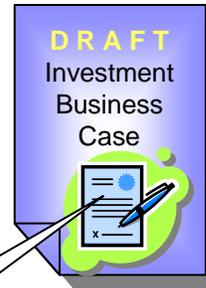
- **Evaluation Phase**, Post-Implementation Review Process:
 - (Deliverable: Post-Implementation Review)



Agency
Strategic
Plan



Agency
IT
Strategic
Plan



Signed by:
- AITR
- Agcy Hd



IPP –
Identified
for
Preliminary
Planning



Pre-Select & Select documents:

Project Business Alignment and Investment Business Case

...prompts the agency to consider the following aspects of the proposed investment:

- Alignment to agency Strategic Plan
- Business problem, desired outcomes
- Funding requirements, funding sources
- Alignment with the Commonwealth Strategic Plan for Information Technology, Governor's IT Improvement Initiatives
- Identify business owner, project sponsor, etc.



Virginia Information Technologies Agency



Code of Virginia § 2.2-2018. **Project Planning Approval Criteria**

Projects are approved based on ...

- the degree to which the project is consistent with the Commonwealth's overall strategic plan,
- technical feasibility of the project (if known),
- benefits to the Commonwealth of the project, including customer service improvements,
- risks associated with the project,
- continued funding requirements, and
- past performance by the agency on other projects.

17

17. Will Tangible Benefits result from the project? ★

(Tangible Benefits - Are benefits that can be measured and quantified. Tangible benefits include savings that result from improved performance and efficiency.)

If "Yes", what type of tangible benefits do you expect?

Cost Savings: ★

Cost Avoidance: ★

Additional Revenue: ★

Other: □

If "Cost Savings", enter amount:

18

18. Will Intangible Benefits result from the project?

(Intangible Benefits – Are benefits that are difficult to measure and quantify. Intangible benefits include such things as customer retention, employee retention and improved customer service.)

If "Yes", what type of Intangible benefits do you expect?

Service:

Improve Efficiency:

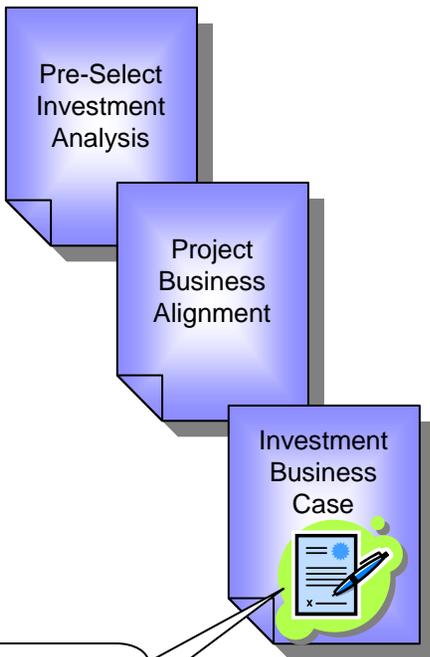
Other:

If "Service", select one:

Select

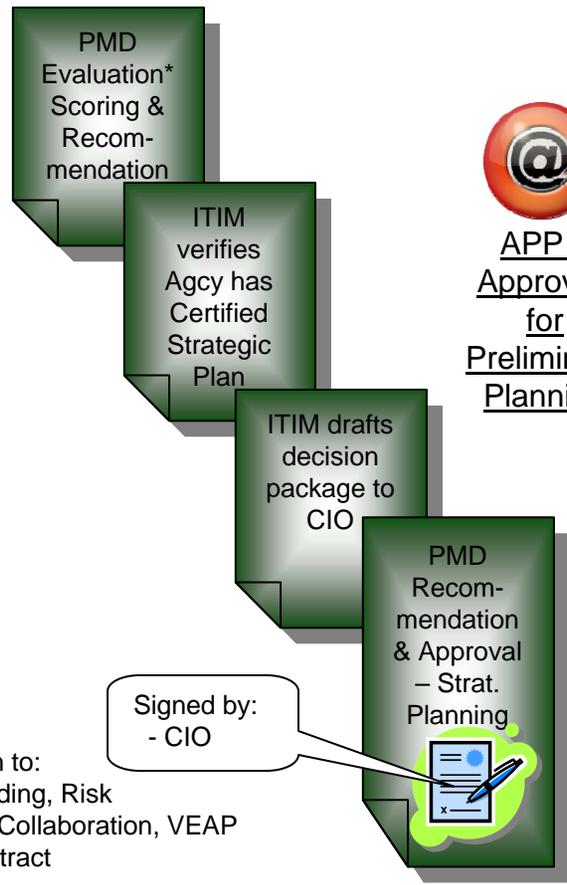
NOTE: As part of the RTIP cycle, projects approved in the RTIP report = IPP or APP approval.


IPP –
Identified
for
Preliminary
Planning



Signed by:
 - AITR
 - Agcy Hd


 Agency submits APP request to ITIM Office



Signed by:
 - CIO


APP –
Approved
for
Preliminary
Planning

* Projects are evaluated with consideration to:
PMD: Strategic Plan, Business Case, Funding, Risk
Ent. Arch: Technical Feasibility, Re-Use, Collaboration, VEAP
Supply Chain: APR, RFP, Statewide Contract
SMO: Infrastructure



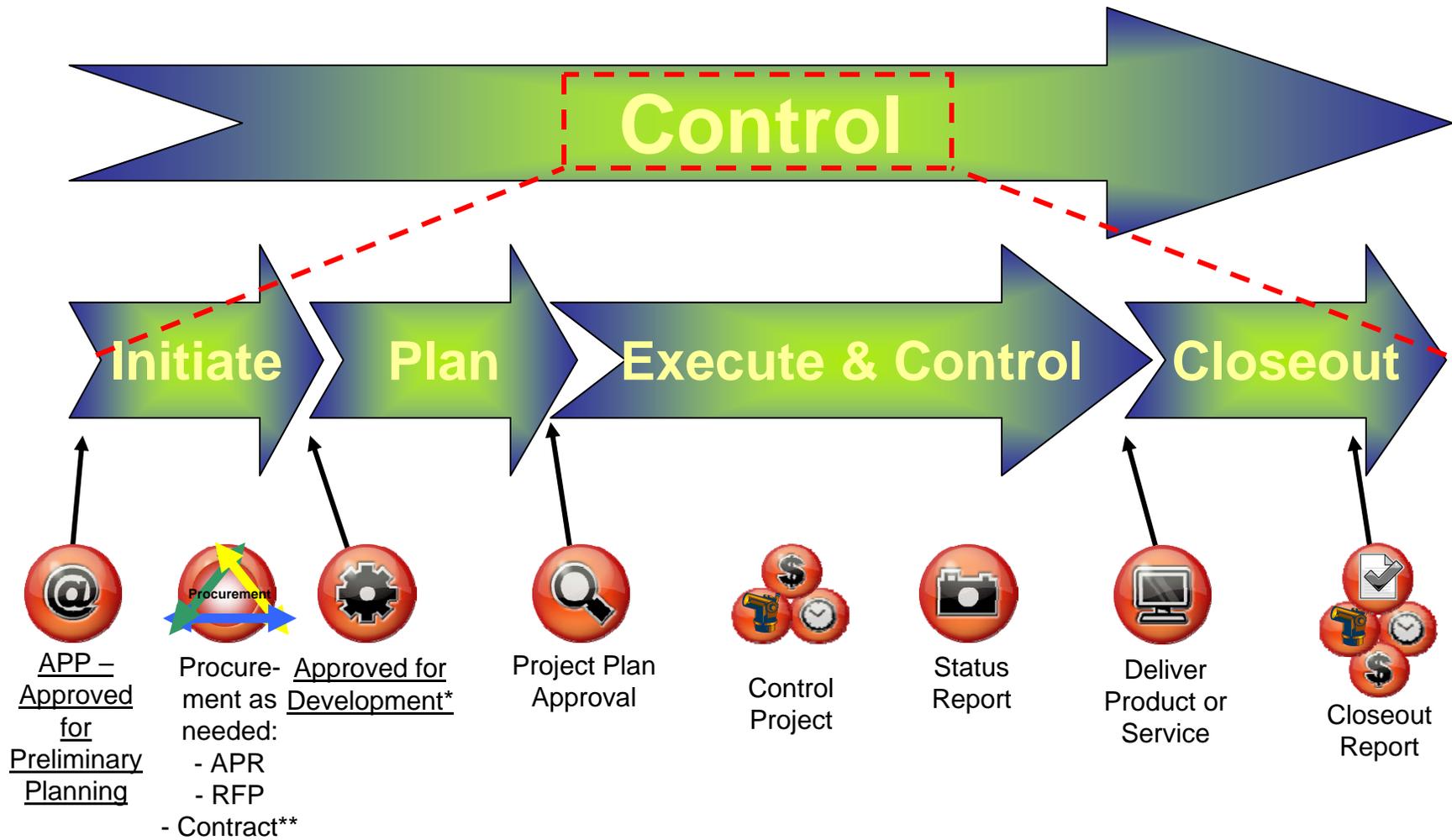
Project Approval – terms to know

- Identified for Preliminary Planning
 - projects which address an agency business need but which require further review by the CIO and ITIB before authorizing the expenditure of additional planning funds
- Planning Approval
 - approval granted by the CIO to proceed with project planning
- Project Planning
 - activities to conduct effective initial analyses of business needs and potentially useful technologies required for development of a detailed business case, incorporating a comprehensive scope definition, supported by sound financial and cost basis analysis
- Development Approval
 - approval by the ITIB to proceed with detailed project planning, project execution and control, project closeout, and asset operation and management
- Detailed Project Planning
 - activities required to complete a detailed project plan for project execution and control as specified in the Commonwealth Project Management Standard

Scorecard: Report #59 Manage ITIB Project Information - Category Portfolio: 501 VDOT Projects

Scorecard | Portfolio | Collaborate | View | User | Setup | Help

Items	Secretariat	Agency	ID Number	Category
501 VDOT Projects	--	--	1784	--
2 ● Eminent Domain Appraisals (COTS)	186 Secretary of ...	501 Department of Transport...	2775	Identified for Preliminary Planning
3 ● Identity Management Initiative	186 Secretary of ...	501 Department of Transport...	8638	Identified for Preliminary Planning
4 ● Integrated Project Management 2.0	186 Secretary of ...	501 Department of Transport...	2867	Identified for Preliminary Planning
5 ● Integrated Six Year Program (Re-architect)	186 Secretary of ...	501 Department of Transport...	10873	Identified for Preliminary Planning
6 ● Land Development Tracking System (LandTrack)	186 Secretary of ...	501 Department of Transport...	8677	Identified for Preliminary Planning
7 ● VDOT Identity & Security Application – Phase 1 – Online...	186 Secretary of ...	501 Department of Transport...	10819	Identified for Preliminary Planning
8 ● Asset Management System - Phase 2	186 Secretary of ...	501 Department of Transport...	936	Approved for Planning
9 ● Pavement Management System	186 Secretary of ...	501 Department of Transport...	2585	Approved for Planning
10 ● Traffic Archived Data Management System	186 Secretary of ...	501 Department of Transport...	10871	Approved for Planning
11 ● VaTraffic	186 Secretary of ...	501 Department of Transport...	10919	Approved for Planning
12 ● VDOT Human Resources Data mart	186 Secretary of ...	501 Department of Transport...	10882	Approved for Planning
13 ● Electronic Toll Customer Service and and Violation Info...	186 Secretary of ...	501 Department of Transport...	2521	Approved for Development (active)
14 ● M5-EMS (aka FEMIS) Equipment Management System	186 Secretary of ...	501 Department of Transport...	2567	Approved for Development (active)
15 ● Roadway Network Systems	186 Secretary of ...	501 Department of Transport...	2610	Approved for Development (active)
16 ● VOIS 2.0	186 Secretary of ...	501 Department of Transport...	3122	Approved for Development (active)
17 ● Asset Management System	186 Secretary of ...	501 Department of Transport...	2484	Completed
18 ● Client-server "Trns*Port" System	186 Secretary of ...	501 Department of Transport...	2496	Completed
19 ● Coleman Bridge Automated Toll Facility	186 Secretary of ...	501 Department of Transport...	2498	Completed
20 ● Competency Dictionary and Software	186 Secretary of ...	501 Department of Transport...	2716	Completed
21 ● Comprehensive Environmental Data Reporting System ...	186 Secretary of ...	501 Department of Transport...	2503	Completed



****NOTE:** Contract may only be signed AFTER Development Approval.

***NOTE:** Projects are designated "active" upon Development Approval.



IT Procurement Concepts to Know

IT Procurement is a topic unto itself... However, regarding ITIM:

- An IT procurement is an IT investment, and must be listed on the agency IT Strategic Plan
 - *Procurements > \$50,000*
- An Agency Procurement Request (APR) must be approved by the CIO
 - For procurements > \$100,000
 - Delegates authority for agency to run procurement process – or stipulates that VITA SCM run the process
- For Major IT Projects:
 - A Request for Proposal (RFP) must be approved for release by the CIO
 - The resulting contract must also be approved by the CIO – ***after project Development Approval granted.***

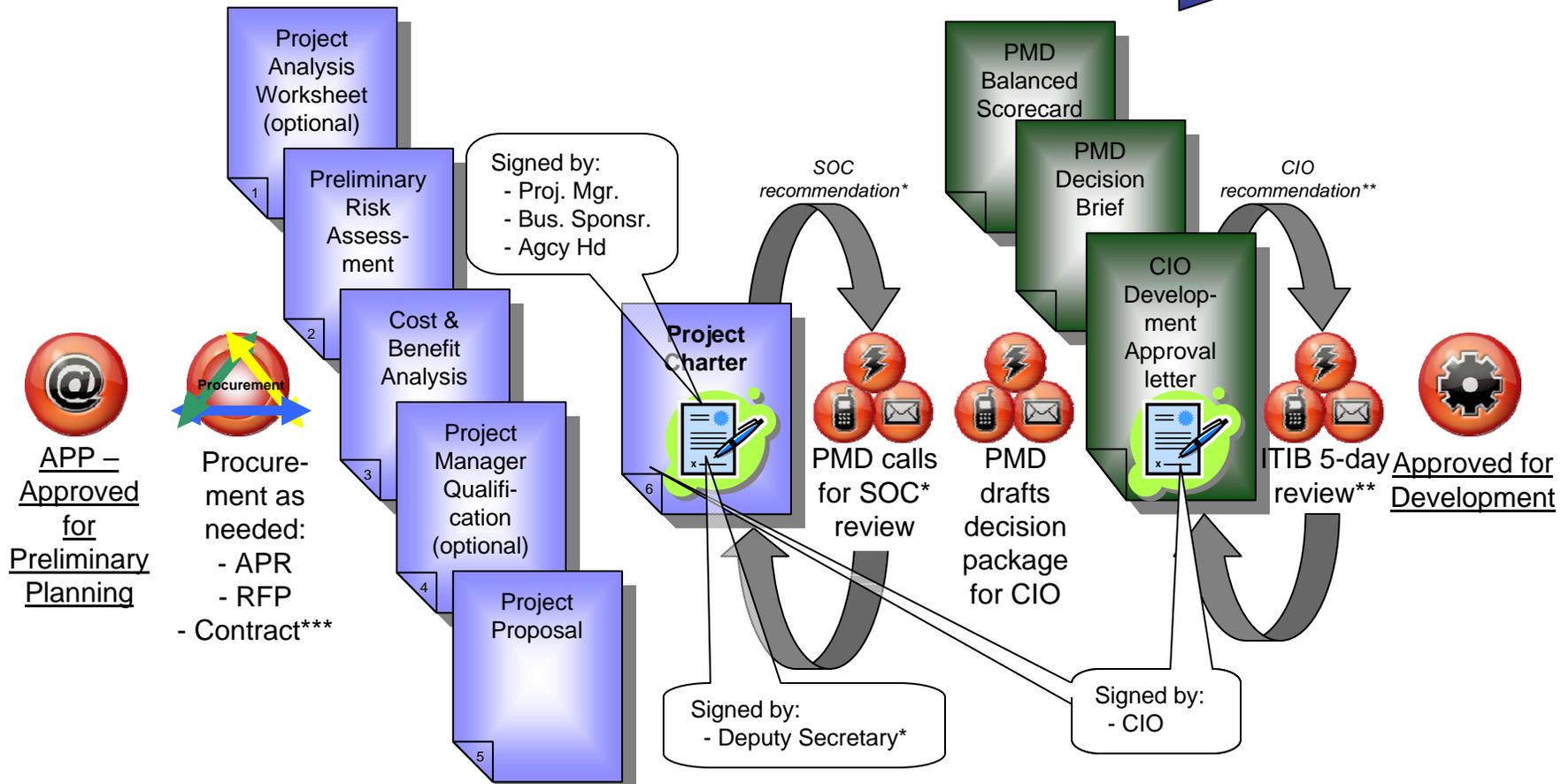


Initiation Phase Summary

- Takes the project from...
 - “Approved for Planning” to...
 - “Approved for Development”
- **Required documentation** for Major and Non-major projects
- Phase Deliverable:
 - ITIB-Approved Project Charter
 - Supported by Project Proposal, Preliminary Risk Assessment, and Cost Benefit Analysis
- The PM Standard and the documentation have not changed; the method and repository has.

Control: Initiate

*NOTE: Initiation steps are **required** for both Major and NON-Major projects except where noted.*



***APR, RFP and Contract require CIO approval. Contract may only be signed AFTER Development Approval.

*Secretariat Oversight Committee (SOC) review/recommendation for Major IT projects only

**CIO recommendation and ITIB review/approval for Major IT projects only

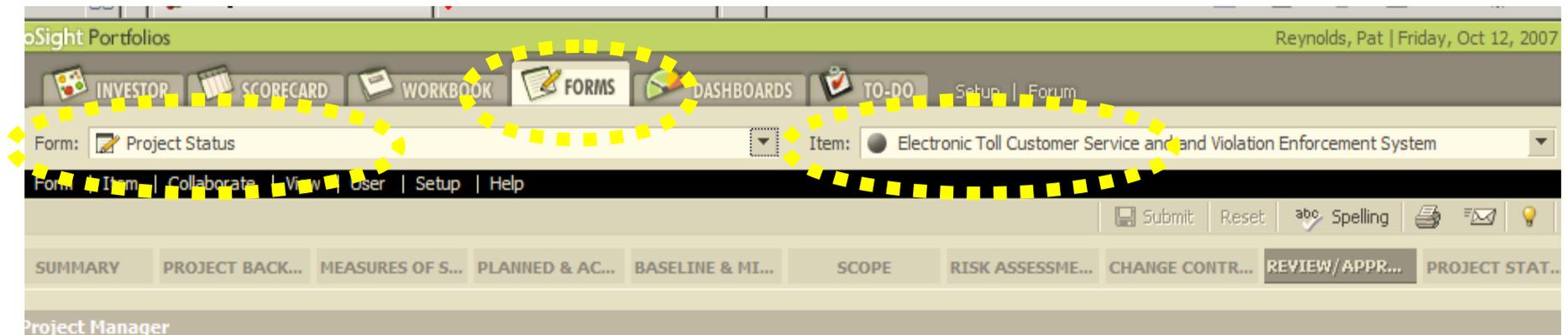


Initiation Phase

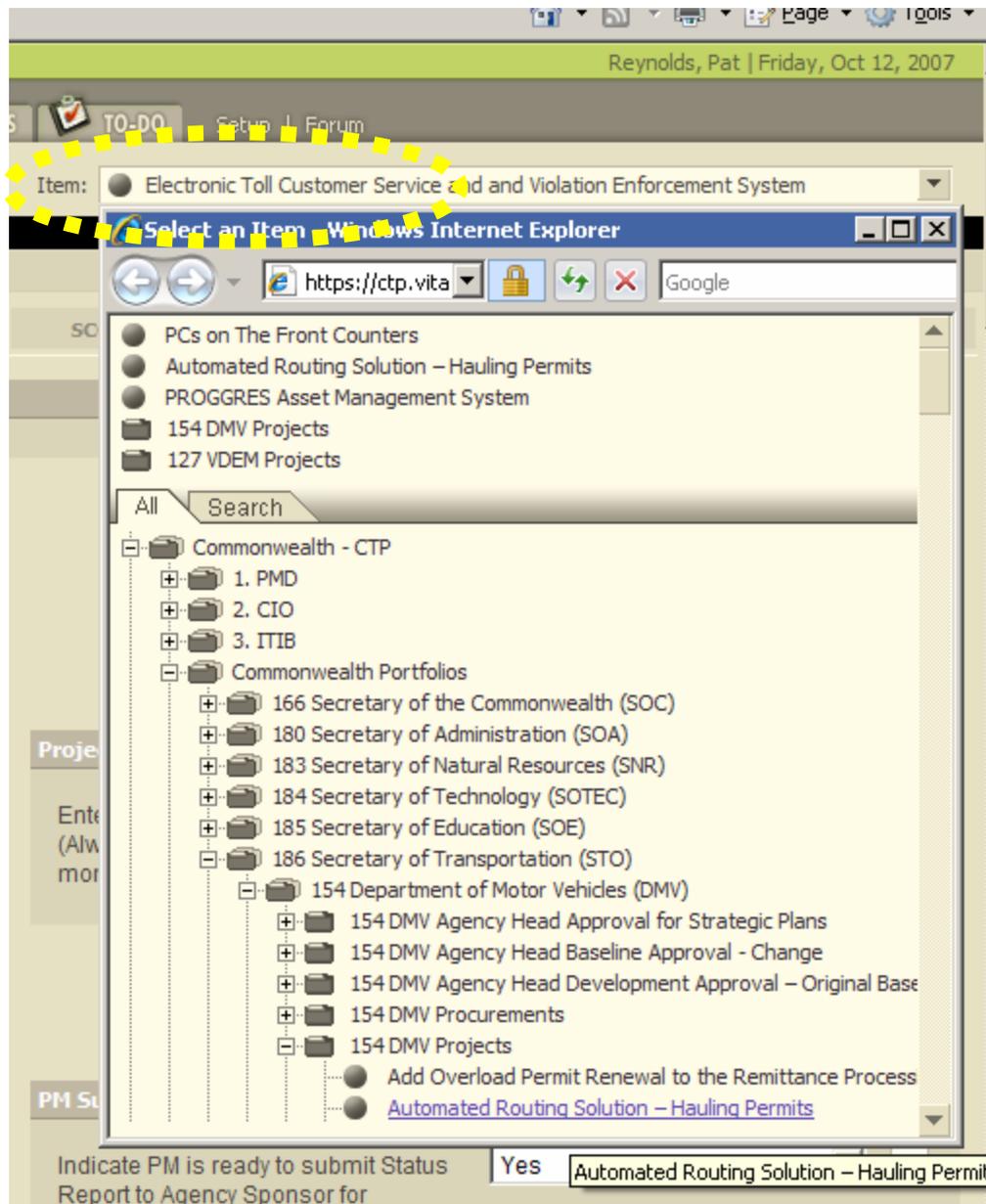
- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 1.1. Initiate, Update and Submit – Project Proposal and Project Charter
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.

Get your bearings in ProSight:

- On “Forms” tab
- Pay attention to “Item”
- Pay attention to “Form”
- ProSight will open to the last Project (Item) and Form you were in
- Pay attention to “Item” and “Form” especially after using Scorecards.

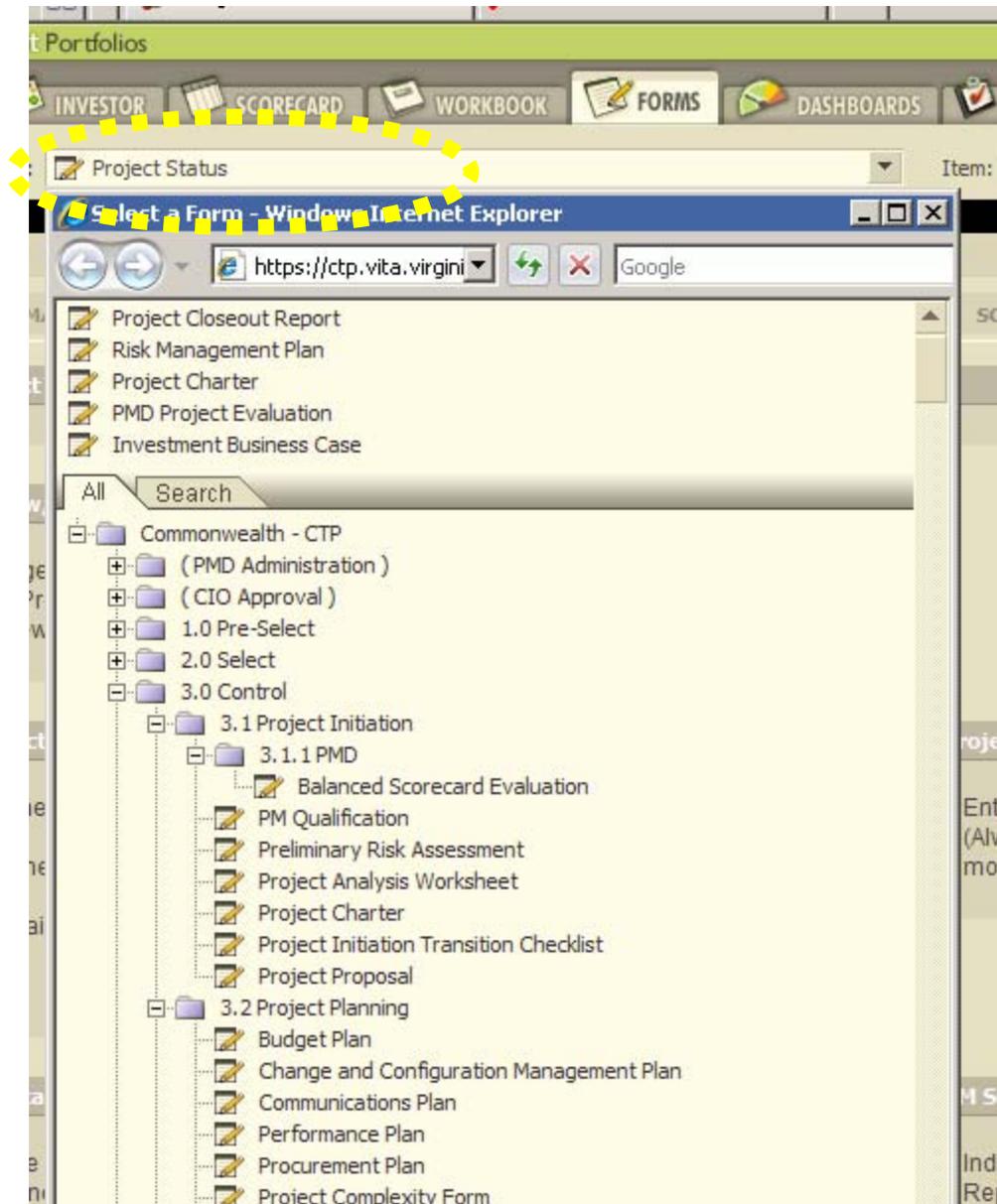


ProSight “Item”

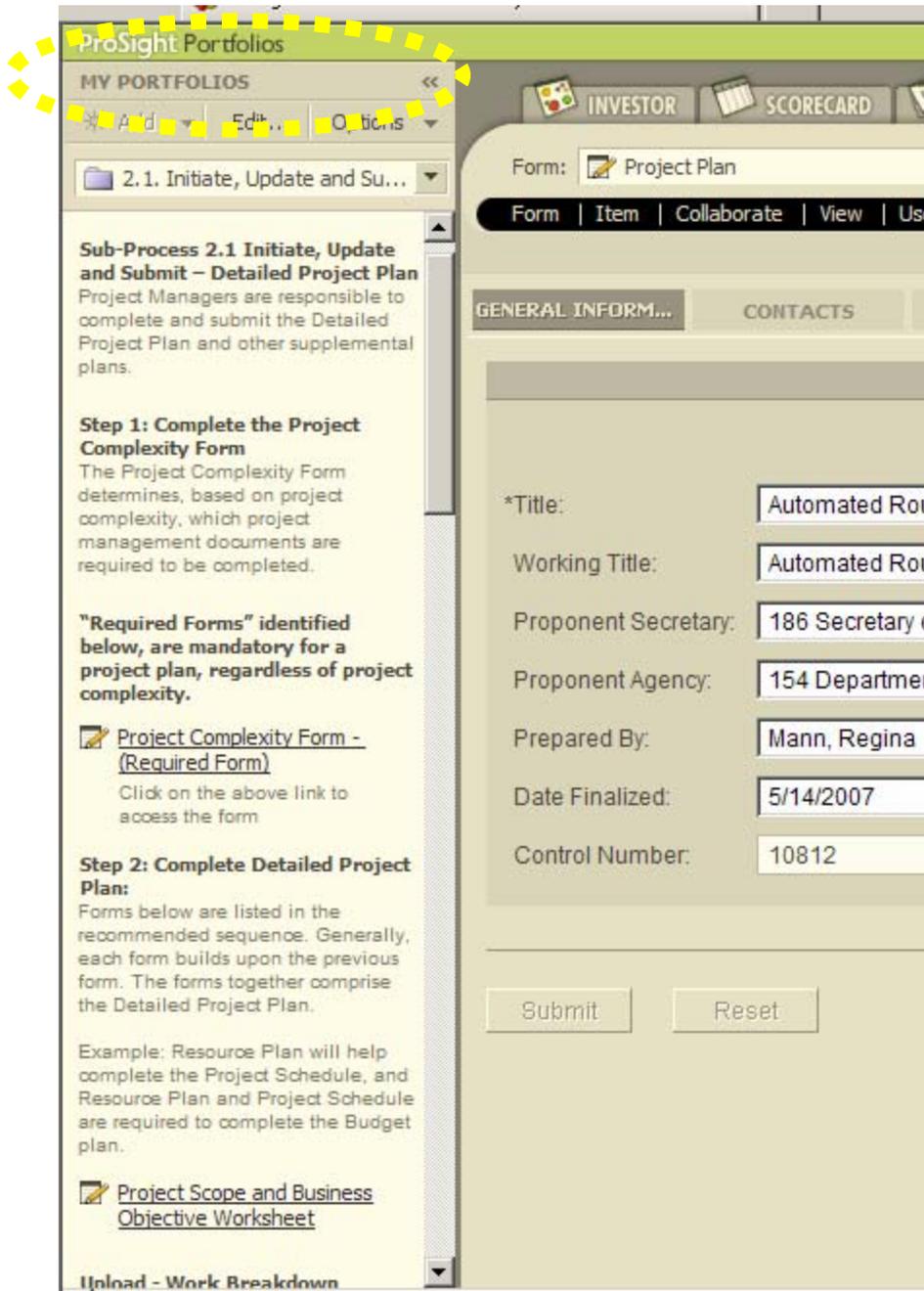


- On “Forms” tab
- Remembers last five projects / portfolios
- Follow path to find your project:
- Commonwealth-CTP >>> Commonwealth Portfolios >>> Secretariat >>> Agency >>> Agency Projects >>> your project

ProSight “Form” shortcut



- On “Forms” tab
- Remembers last five forms
- Follow path to find your form:
- Commonwealth-CTP >>> Project Phase >>> Project Activity >>> Form



ProSight “My Portfolio”

- Navigation pane
- Role-specific
- Contains narrative explaining each step, in sequence
- Click on embedded links for each new form
- Links to pertinent reference resources



Documentation: Initiation Phase

- Project Analysis Worksheet
 - Optional, but helpful
- Project Proposal
 - Cost Benefit Analysis Tool (upload)
- Preliminary Risk Assessment
 - Dynamic form
- PM Qualification



Project Initiation documents:

Project Charter and Project Proposal

...is an agreement between all stakeholders:

- Project purpose, measures of success
- Management commitment, oversight in place
- Funding requirements, funding commitment
- Commitment of required resources
- Qualified project manager
- Project scope, schedule and budget baselines
- Captures approvals of:
 - IAOC, project sponsor
 - Secretariat Oversight Committee
 - CIO, ITIB



Documentation: Initiation Phase – Cont.

- Project Charter
 - New: Measures of Success (previously captured in old Dashboard)
- Project Charter: Development Approval
 - Business Sponsor
 - Agency Head (view only)
 - Form > Export... & save Project Charter as .xml document
 - Attach to email and request approval via email
 - Save approval email reply as .txt, and upload email document into ProSight
 - Notify PMD
 - Secretariat (PMD will coordinate)
 - PMD / CIO / ITIB
 - ARCHIVE Project Initiation documents!
- Checking Approval Status (Scorecard)



Cost Benefit Analysis – Tool

Business Process C	2. Ongoing Facilities Costs		\$0	\$0	\$0	\$0	
	3. Ongoing Hardware Costs		\$0	\$0	\$0	\$0	
	4. Ongoing Software Costs (incl. Maint.)		ICP/Maintenance	\$0	\$0	\$0	\$0
	5. Other Ongoing Costs		Tangible Benefits	\$0	\$0	\$0	\$0
I.T. Project Investment Costs	6. Project Costs		Note(s)		\$0	\$0	
	6a. Internal Staff Labor				\$0	\$0	
	6b. Services				\$0	\$0	
	6c. Software Tools				\$0	\$0	
	6d. Hardware				\$0	\$0	
	6e. Materials and Supplies				\$0	\$0	
	6f. Facilities				\$0	\$0	
	6g. Telecommunications				\$0	\$0	
	6h. Training				\$0	\$0	
	6i. IV & V				\$0	\$0	
	6j. Contingency (Risk)				\$0	\$0	
	6k. User Defined Item 1 (chg name as needed)				\$0	\$0	
	6l. User Defined Item 2 (chg name as needed)				\$0	\$0	
	6m. User Defined Item 3 (chg name as needed)				\$0	\$0	
6n. User Defined Item 4 (chg name as needed)				\$0	\$0		
6o. User Defined Item 5 (chg name as needed)				\$0	\$0		
	7. Revenue		\$0	\$0	\$0	\$0	
Tangibles Analysis	<i>Incremental Benefits Summary</i>						
	Benefit Type	Benefit Code		AS IS	Option A	Option B	
	Cost Avoidance (One Time)	CAO		\$0	\$0	\$0	
	Cost Avoidance (On-Going)	CAA		\$0	\$0	\$0	
	Hard (Cost) Savings	HCS		\$0	\$0	\$0	
	Productivity Gains	PRD	NOT MEASURED				
	Revenue	REV		\$0	\$0	\$0	
	Other	OTH	NOT DEFINED				
	To Be Assigned	TBA	NOT DEFINED				

Form: Project Charter Item: Automated Routing Solution - Hauling Permits

Business Objectives

Using the objectives outlined in the Charter, list the objectives and any additional detail as necessary to clarify what results the project is intended to attain.

Commonwealth Strategic Plan - Critical Issues	Project Business Objectives
Improved Service Delivery	Provide customers with the ability to self-issue certain types of predefined hauling permits Provide effective service and customer satisfaction Serve customers as cost effectively as possible Maximize quality of customer satisfaction
Consolidated Operational Environments	Integrate and automate manual processes performed by VDOT and DMV into the current Hauling Permits Program Maximize use of technology for Motor Carrier Regulation Services - Hauling Permit Program

Assumptions

Assumptions are statements taken for granted or accepted as true without proof. Assumptions are made in the absence of fact. List and describe the assumptions made in the decision to charter this project.

It is imperative that Virginia Department of Motor Vehicles (DMV) IT, Virginia Department of Transportation (VDOT) IT, and VITA partner throughout this project. With the final solution sharing resources from DMV and VDOT, the IT departments of each agency will need to have a voice in its design and implementation phases.

- Data will be required from the VDOT systems to build the models used by the routing system
- VDOT Bridge Resources will need access to the interface to manage routing system models
- DMV's VAHPS System will need access to the routing system and its models

The DMV Hauling Permits Team and VDOT's Bridge Division should be prepared to provide detail of their current business process as it relates to permit routing. It is anticipated that this solution will change how business users from both agencies will interact with each other and the system. The changes will be easier to identify and



Planning Phase Summary

- Takes the project from...
 - “Approved for Development” to...
 - CIO-Approved Detailed Project Plan
 - Approved Baseline
- **Required documentation** for Major projects, may be used for Non-major projects
- Phase Deliverable:
 - CIO-Approved Detailed Project Plan
 - Plus all supporting project plan documents, as outlined in the Project Complexity Form
- The PM Standard and the documentation have not changed; the method and repository **has**.

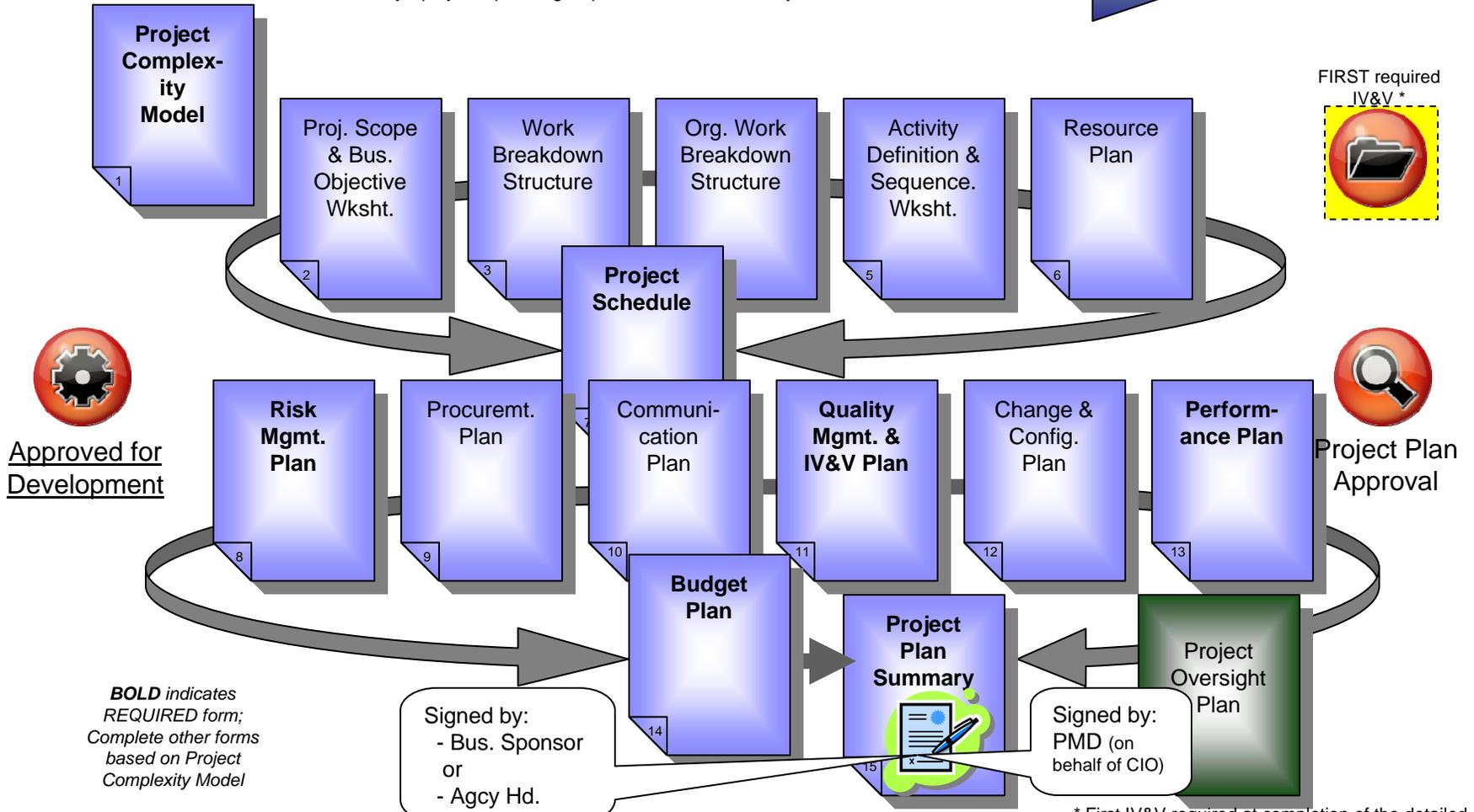


Documentation: Planning Phase

- Project Planning requires the most hands-on involvement of Project Managers
- Axiom: The more thought and effort invested in project planning, the fewer unpleasant “surprises” you will encounter during the life of the project.

Control: Plan

*NOTE: For NON-Major projects, planning steps described are **not required**, but recommended.*



BOLD indicates **REQUIRED** form; Complete other forms based on Project Complexity Model

* First IV&V required at completion of the detailed project plan and before execution begins.



Planning Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 2.1. Initiate, Update and Submit – Detailed Project Plan
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.



Documentation: Planning Phase

- Project Complexity Model
 - Determines project documentation needs
- Project Scope and Business Objective Worksheet
- Upload:
 - Work Breakdown Structure
 - Organization Work Breakdown Structure
 - Activity Definition & Sequencing Worksheet
- Resource Plan
- Project Schedule
 - Upload Microsoft Project schedule
 - Enter in Major Milestones

Remember:
Item >
Document... >
Upload...



Each question has four responses provided in the model. Each response has a numerical value. The sum of the numerical values, from the responses selected, results in a numerical score that identifies the level of project complexity.

- | | |
|--|---|
| 1. What is the total project cost? | Greater than \$1 Million |
| 2. What is the estimated cost of hardware? | Less than \$100k |
| 3. What is the estimated cost of software? | Greater than \$1 Million |
| 4. What is the estimated cost of application development or software configuration services? | Less than \$100k |
| 5. How much confidence is there in the funding projections? | Accuracy of budget estimate is > 50% and < or = 85% |
| 6. What percentage of agency budget does the project represent? | Project is < 2% of agency budget |
| 7. Is the project sponsor fully resourcing the project? | Sponsor has control of most of resources |
| 8. What is the size of the project team? | 2 to 5 |
| 9. What is the PM's authority over the project? | High to Almost Total |
| 10. To what degree are the team members colocated? | 50-90% in same location |
| 11. What is the duration of the project? | 6 to 12 mos |
| 12. How much variation in timeframe can be tolerated? | Highly flexible Schedule |
| 13. Are there any dependencies and/or inter-related projects? | Some major dependencies |
| 14. Has the agency or vendor executed similar projects? | Several successful projects conducted |
| 15. Does the project address State and Fed mandates? | Little or no direct impact |

ProSight Portfolios - Forms: Project Complexity Form

ProSight Portfolios

INVESTOR SCORECARD WORKBOOK FORMS DASHBOARDS TO-DO Setup | Forum

Form: Project Complexity Form Item: Automated Routing Solution – Hauling Permits

Form | Item | Collaborate | View | User | Setup | Help

Submit | Re

PROJECT COMPLEXITY MODEL

*Project Name: Automated Routing Solution – Hauling Permits

Interim Score: 163

Low Complexity 55-124 Range Med Complexity 125-210 Range High Complexity 211-338 Range

Required Documentation:

- Planning - Project Plan Executive Summary (template)
- Planning - Project Performance Plan (template)
- Planning - Work Breakdown Structure (template)
- Planning - Project Schedule (template)
- Planning - Budget Plan (template)
- Planning - Procurement Plan (template)
- Planning - Risk Management Plan (template)
- Planning - Communications Plan (template)
- Planning - Change and Configuration Management Plan (template)
- Planning - Quality Management and IV and V Plan (template)
- Execution - Status Report (template)
- Execution - Issue Log and Issue Management (template)
- Execution - User Acceptance (template)
- Execution - Close Report (template)
- Ops and Support - Post Implementation Report

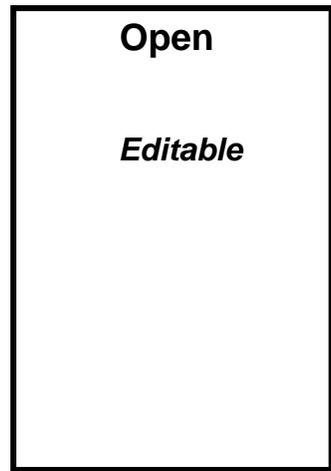


ProSight Concept: Baseline Versions

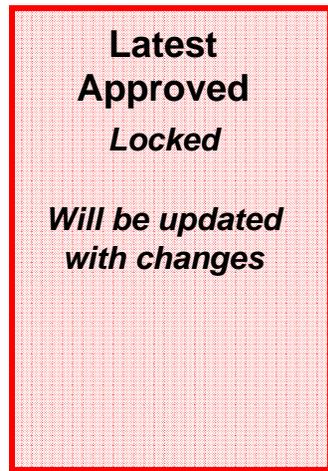
- Original Approved
 - Project Charter Values
 - Cannot be changed
- Latest Approved (or Latest CIO-Approved)
 - Is locked upon CIO approval of detailed project plan
 - Can only be changed by PMD
 - IAOC can add to budget & schedule baseline up to 10%
 - Greater than 10% change requires Secretariat and CIO approval
- Open Version
 - “What if” worksheet; can be changed at will
 - Status Report measures against Last/Latest Approved baseline



Change Approval



Approve - Changes



Change Approvals:

Data from the Open Form will populate only the Latest Approved Form.

Original Approved Form will NOT be updated.





Documentation: Planning Phase – Cont.

- Risk Management Plan
 - Used to determine contingency cost
- Procurement Plan
 - Recommend using only the “Summary” tab until Procurement Method tabs are further elaborated.
- Communications Plan
 - Useful in detailing communications strategy
- Quality Management and IV&V Plan
 - Remember, every major project requires at least two IV&V’s



Documentation: Planning Phase – Cont.

- Change and Configuration Management Plan
 - (Not Organizational Change Control)
- Performance Plan
 - Measures of Success values will carry forward / backward from Project Charter, Project Plan Summary and Project Status Report
- Budget Plan
 - Quarterly Spend Plan = tactical & 'what if' budgeting
 - Yearly Spend Plan is a good example of the three baseline versions



Documentation: Planning Phase – Cont.

Project Plan Summary

- Mostly a 'view' of information you entered into ProSight elsewhere – with a few exceptions
- Manually enter: Critical Path Milestones
 - Hint: Run 'Critical Path' report in MS Project & filter Milestones
- Manually enter: Top Ten Risks

- Project Plan Approvals
 - Capture approvals in this tab
 - IAOC (Form > Export... email... upload reply)
 - CIO (PMD)

Focus On:

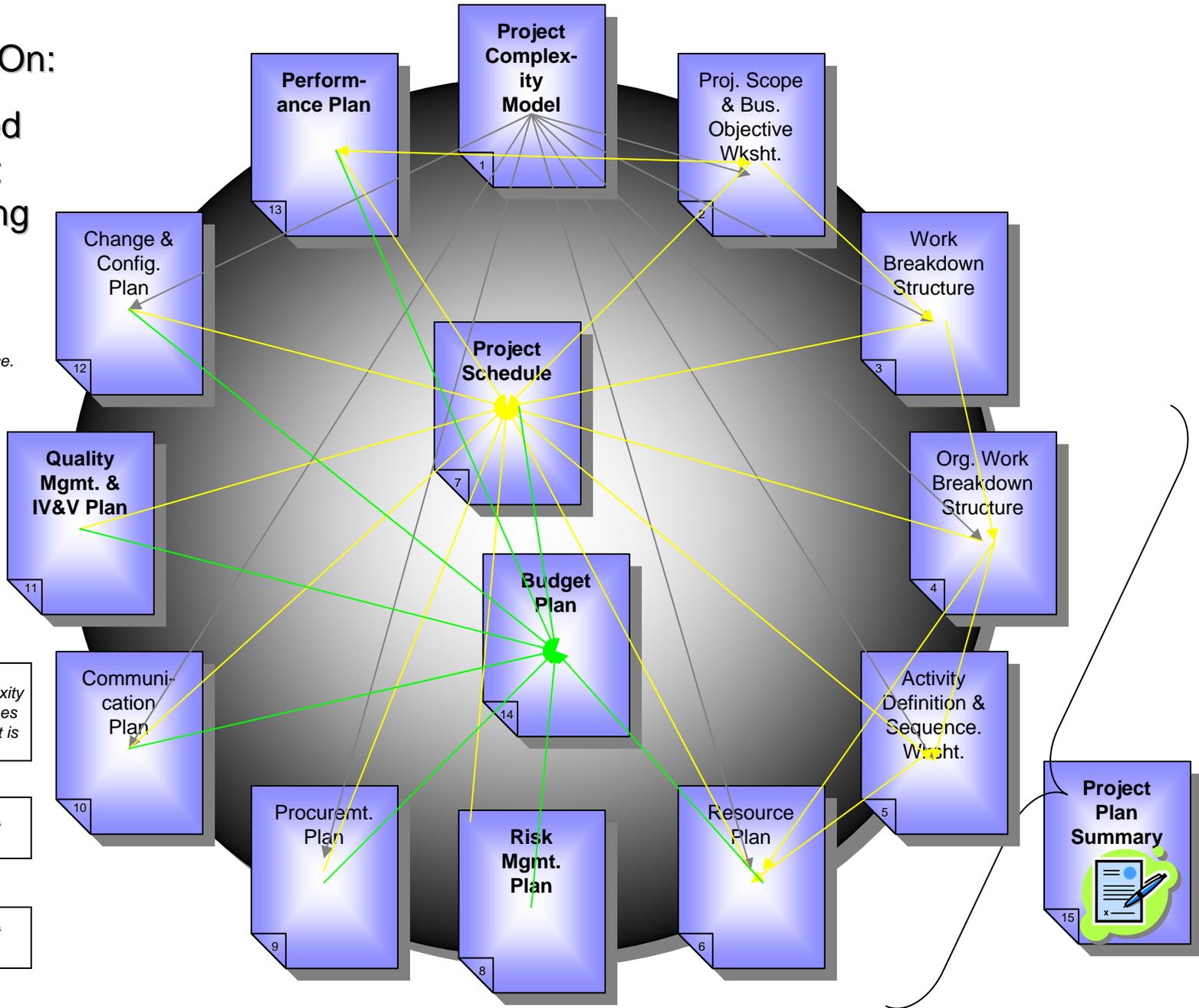
Detailed Project Planning

BOLD indicates REQUIRED form; Complete forms in numerical sequence.

Project Complexity Model determines if this document is required.

Impacts Project Schedule.

Impacts Project Budget Plan.





Detailed project planning:

Project Plan

...lays out the detailed map to achieve the project deliverables:

- Project description, measures of success
- Schedule: critical path
- Budget plan
- Risk management
- Quality management and IV&V plan
- Project scope, schedule and budget baselines
- Captures approvals of:
 - IAOC, project sponsor
 - CIO

ProSight Portfolios - Forms: Project Plan

ProSight Portfolios Reynolds, F

INVESTOR SCORECARD WORKBOOK FORMS DASHBOARDS TO-DO Setup | Forum

Form: Project Plan Item: Automated Routing Solution - Hauling Permits

Form | Item | Collaborate | View | User | Setup | Help

Submit Reset Spell

GENERAL INFORM... CONTACTS SUMMARY A SUMMARY B MEASURES OF SU... CRITICAL PATH BUDGET PLAN SU... PROCUREMENT &

Measures of Success - LA

Note

This form tab contains the LATEST APPROVED Project Baseline information. To update the information, use the Change Control Request > 10% form and submit for approval

Performance Plan Summary

Provides a summary of the Performance Measures. List the Project Objectives, Performance Goal for each objective, and briefly describe the Methodology. Performance Goal is measured

Objective (1): Provide customers the ability to self-issue certain types of hauling

Performance Goal: After implementation, customers will be able to successfully self-issue through the Internet 75% of hauling permits

Methodology: User acceptance testing & statistical reporting

Objective (2): Provide effective service and customer satisfaction



Execution & Control Phase Summary

- Takes the project from...
 - CIO-Approved Detailed Project Plan
 - (Approved Baseline) to...
 - Completed User Acceptance Document
- **Required documentation** for Major projects; may be used for Non-major projects
- Phase Deliverable:
 - (Besides the new Product or Service...)
 - Completed User Acceptance Document
- The PM Standard and the documentation have not changed; the method and repository **has**.

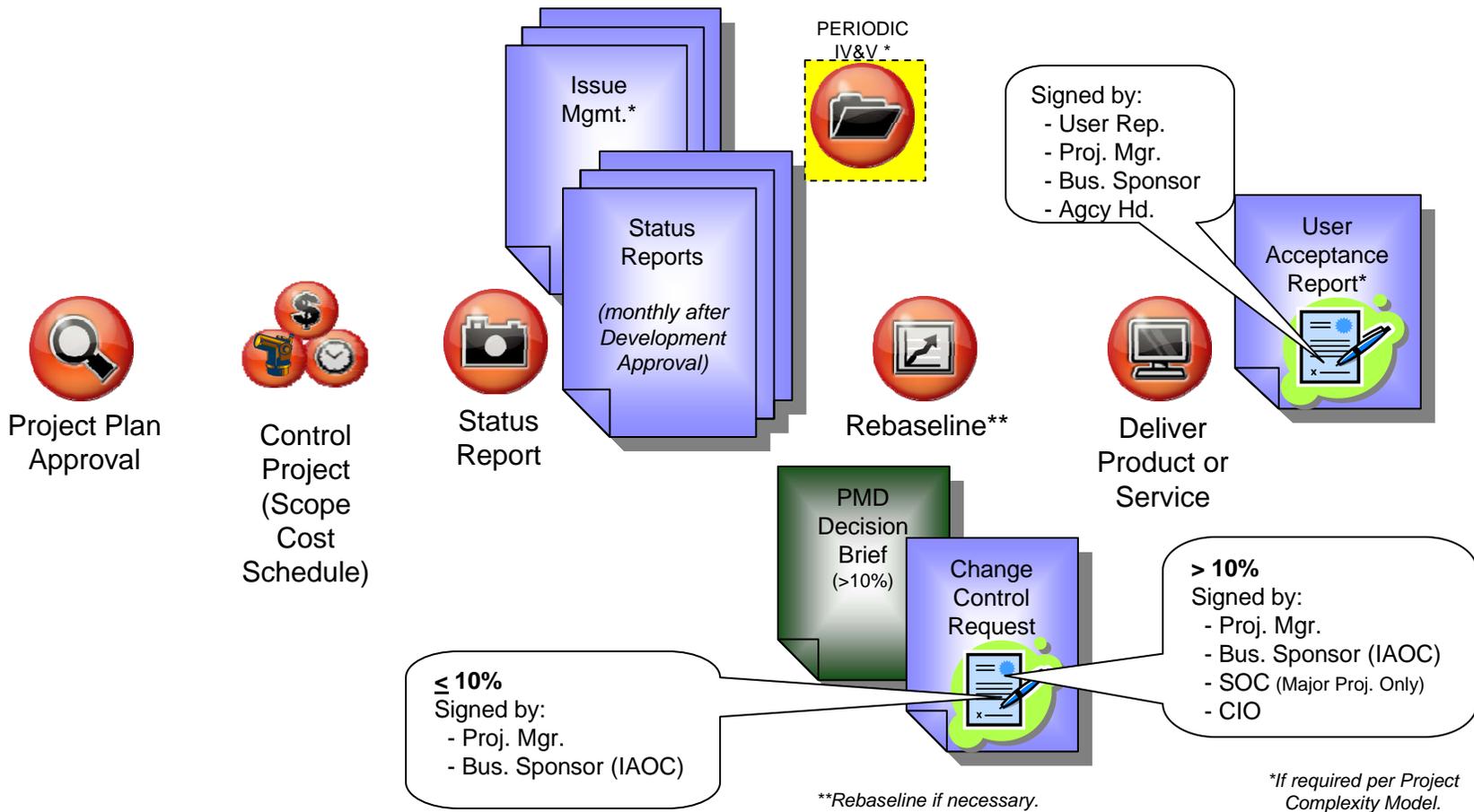


Execution & Control Phase

- Project Execution & Control is an exciting phase in the project lifecycle.
 - Deliverables are.... Delivered.
 - Progress is measured and reported against the approved project plan.
 - Issues arise and are managed.
 - Risks evolve and are addressed.
 - The project is carefully controlled.
 - This phase also requires plenty of hands-on involvement of Project Managers.

Control: Execute & Control

NOTE: For NON-Major projects, execute & control steps described are **not required**, but recommended.
 Additionally, NON-Major projects **must** submit a Change Control Request when scope, schedule or budget exceeds 20%.





Execution & Control Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 3.1. Initiate, Update and Submit – Project Status Report
 - » 3.2. Initiate, Update and Submit – Issue Management Log
 - » 3.3. Initiate, Update and Submit – \leq 10% Change Control Request
 - » 3.4. Initiate, Update and Submit – $>$ 10% Change Control Request
 - » 3.5. Initiate, Update and Submit – Project Execution and Control Transition Checklist
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.



Project Status Reporting

- Developed and submitted monthly through ProSight.
- Establishes a consistent, common framework for agency, Secretariats, CIO, and ITIB to update project activity, monitor progress, and assess risks.
- Enhances ability to respond to project changes in a timely manner.
- Increases accountability.
- Improves project management capabilities.
- Provides data for public view on VITA Public Dashboard.



Monthly Project Status Report

- Project Status Report due dates:
 - Project Status forms are prepared at the beginning of each month, based on the previous month's activity. By the:
 - 6th business day:
 - The PM drafts the monthly version of the form.
 - 9th business day:
 - The agency sponsor approves the form.
 - 12th business day:
 - The proponent Secretary evaluates the approved status form.
 - 15th business day:
 - PMD conducts review of Project Status Reports.
 - 18th business day:
 - CIO evaluates Project Status Reports.
 - End of the month:
 - The new Dashboard will take a snapshot of the project status form.



Documentation: Project Status Report

- Project Status Report – Step 1:
 - Update Project Plan as necessary; Are there any changed baselines?
 - Review/Update Project Plan Information – ‘Open’ version
 - Project Schedule
 - Adjust Milestone dates as necessary
 - Initiate Change Control Request process as necessary
 - Budget Plan
 - Adjust Budget as necessary
 - Initiate Change Control Request process as necessary
 - Risk Management Plan
 - Update top five risks
 - Performance Plan
 - Adjust Measures of Success as necessary
 - Initiate Change Control Request process as necessary



Documentation: Project Status Report

- Project Status Report – Step 2:
Complete the Project Status Report
 - Summary Tab: Key Status Indicators (KSI's)
On Track / Warning / Problem
 - Project Background Tab:
 - Update Approval Information as needed
 - Planned & Actual Costs Tab:
 - Enter Costs to Date
 - Baseline & Milestones Tab:
 - Enter Total (entire project) Percent Complete
 - Enter Milestone Actual Start, Completion & Percent Complete
 - Risk Assessment Tab:
 - Detail the changes, and update the Risk review date
 - Change Control Description Tab:
 - If Latest Approved baselines have changed since the last reporting period, briefly describe the reason and impact.



Documentation: Project Status Report

- Project Status Report – Step 3:
 - Submit 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.
 - Use ProSight e-mail to request Agency Head approval
 - **Oops!** I messed up: Can I have a do-over?
 - Yes
 - The system saves the latest information on that day
 - However,
 - You cannot back-date project metrics

Form: Project Status Item: Automated Routing Solution – Hauling Permits Trend Graph Period:

Item Collaborate View User Setup Help

Submit Reset abc Spe

SUMMARY PROJECT BACK... MEASURES OF S... PLANNED & AC... BASELINE & MI... SCOPE RISK ASSESSME... CHANGE CONTR... REVIEW/AI

Project Information

Working Title:	Automated Routing Solution – Hauling Permits
Item Classification:	Major
Proponent Agency:	154 Department of Motor Vehicles
Proponent Secretary:	186 Secretary of Transportation
Category:	Approved for Development (active)
Planned Start Date:	6/15/2007
Planned Completion Date:	11/14/2008
Budget at Completion (BAC):	1,467,395.00
Project Manager:	ITS Project Manager / Regina Mann / DMV
Project Manager Phone:	804-367-6125
Project Manager Email:	regina.mann@dmv.virginia.gov



Documentation: Issue Management

- Issue Management in ProSight
 - Used mainly for archiving
 - PMD recommends you use your own spreadsheet for dynamic issue management
 - Upload a dated issue log monthly (use upload tab)
- Issue Management Log (tab)
 - Optional use
 - Enables use of Issue Management Scorecard
- Issue Management Scorecard
 - Optional use
 - Use only if Issue Management Log is maintained



Documentation: Change Control \leq 10%

- Cumulative baseline changes that do not exceed 10%
 - Must be approved by the IAOC and
 - Submitted to PMD
- Exactly the same information as today's Change Control Request template
 - Project Manager is the initial Approver (on Review tab)
- Approvals are captured in ProSight form
 - Email or export form to approval party
 - PMD will enter approval information upon receipt
- PMD will key in new scope, schedule & budget baselines.
 - New baselines (Open version) will become "Latest Approved" baselines.
 - Contact your PMD Project Management Analyst for assistance.



Documentation: Change Control > 10%

- Cumulative baseline changes that exceed 10%
 - Must be approved by the IAOC and
 - Must be approved by the Secretariat Oversight Committee and
 - Submitted to PMD for recommendation to
 - CIO
- Exactly the same information as today's Change Control Request template
- Approvals are captured in ProSight form
 - Email or export form to approval party
 - PMD will enter approval information upon receipt
- PMD will key in new scope, schedule & budget baselines.
 - New baselines (Open version) will become "Latest Approved" baselines.
 - Contact your PMD Project Management Analyst for assistance.



VITA Public Dashboard

- Provides public view of major project status
- From VITA web site:
 - <http://dashboard.virginia.gov/PublicDashboard/>

Virginia Information Technologies Agency

Home

Font Size: Print Friendly:

Welcome to VITA's Public Dashboard

This is a summary report of VITA's performance in four key areas -- CIO Objectives; spending with Small, Woman and Minority (SWaM) owned businesses; Major Information Technology (IT) Projects; and the IT Infrastructure Partnership with Northrop Grumman. This Internet-accessible report provides a simple visual status indicator, or dashboard, for each project area. It also provides "drill down" capability to obtain more information by simply "clicking" on the red, yellow and green numbers.

These measures help track progress in meeting the VITA mission -- "To provide information technology that enables government to better serve the public."

Major IT Projects





Closeout Phase Summary

- Takes the project from...
 - Signed User Acceptance Document to...
 - Completion of the Closeout Report
- **Required documentation** for both Major and Non-major projects
- Phase Deliverables:
 - Project Closeout Report
 - Document Lessons Learned
 - Schedule Post-Implementation Review
- The PM Standard and the documentation have not changed; the method and repository **has**.

Control: Closeout

NOTE: Closeout steps are **required** for both Major and NON-Major projects.



Product or Service Delivered

FINAL required IV&V*
(MAJOR Projects ONLY)



Signed by:

- Proj. Mgr.
- Bus. Owner
- Proj. Sponsor
- Agcy Hd.
- PMD
- CIO



Closeout Report

* Final IV&V required at project closeout to validate the success of the project.



Closeout Phase

- My Portfolios >
 - ITIM Processes >
 - Role-Based Processes >
 - Project Manager Processes:
 - » 4.1. Updating and Submitting - Project Closeout Report
 - » 4.2. Update Lessons Learned on PMDP Website
 - » 4.3. Archive Project Documentation
 - » 4.4. Complete Project Closeout Transition Checklist
- Now, just read the “My Portfolios” guide and follow the steps in order!
 - Remember the LIGHTBULB: “Knowledge Base” to give you topical help and form guidance.



Documentation: Project Closeout Report

- Documents project deliverables
- Gives final report on baselines vs. actuals
 - Variances and explanations
 - Scope
 - Schedule
 - Budget
 - Operations & Maintenance
- Links to PMD Best Practices & Lessons Learned website
 - Link within ProSight form
- Document Schedule for Post-Implementation Review
- Captures mandatory Sponsor/Oversight/CIO approvals.



Documentation: Evaluation Phase

- PMs normally do not do this phase.
- You *might* be involved in this.
- As always, follow the directions in “My Portfolios”
- Evaluation phase consists of conducting Post-Implementation Review, and uploading results into ProSight.



PIR -
Post
Implemen-
tation
Review



Post-Implementation review:

Post-Implementation review

...the agency analyzes the value obtained by implementing the project...

- Conducted by the agency 12-18 months after project closeout
- Seeks to quantify the tangible benefits, based on chartered business objectives
- Seeks to verify intangible benefits
- Findings, lessons learned shared with business sponsor



More Information

- My Portfolio – read it!
- LIGHTBULB (Knowledge Base)
- HELP – Generic ProSight help (navigation, etc.)
- Today's Handouts
- Contact your Project Management Analyst
- Online sources – PMD starting a ProSight FAQ

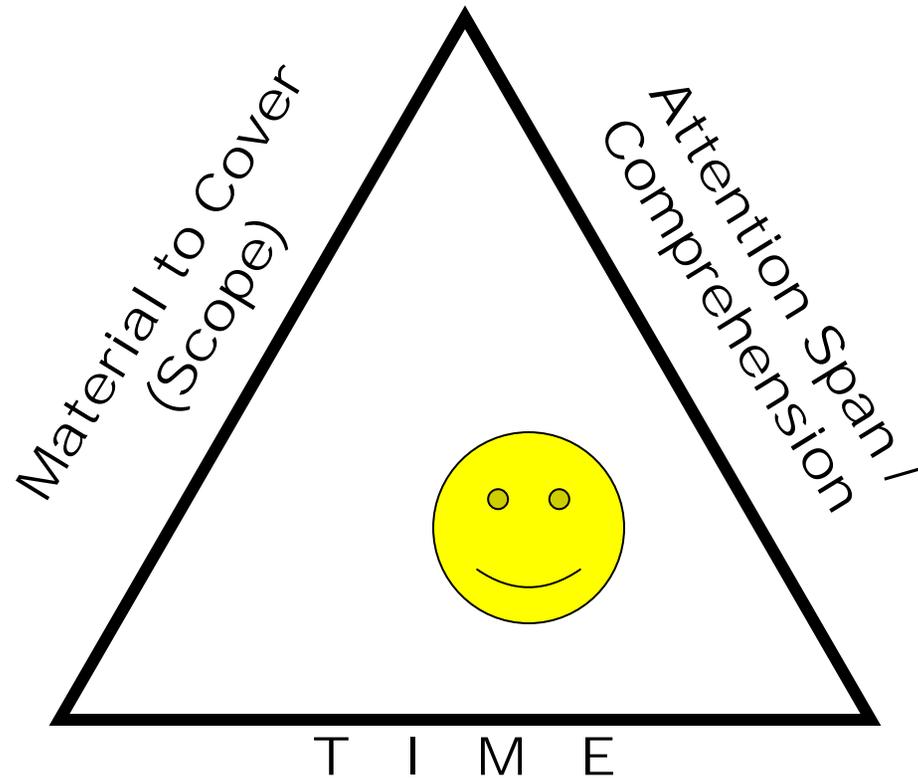
- Peers – let's talk!



PMD Secretariat Liaisons

- Administration, Finance, Technology
 - Chris Hinkle
- Agriculture and Forestry, Natural Resources
 - Mike Sandridge
- Commerce and Trade, Health and Human Resources
 - Hubert Harris
- Education
 - Mike Sandridge (lead) and staff
- Public Safety
 - Bob Haugh
- Transportation
 - Pat Reynolds

patrick.reynolds@vita.virginia.gov





Virginia Information Technologies Agency



Questions and Answers