Project Management Methodology
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INTRODUCTION

1. Overview

Texas A&M University Information Technology (Texas A&M IT) has established a centralized Project Management Office (PMO). As its charter states, the PMO is charged with creating and maintaining a documented project management methodology to be used on all technology projects. This methodology is designed to meet the needs of all segments of the organization as they engage in technical project work. It serves as a guide to the organization in project selection, to project teams in planning work, to management in providing oversight, and to sponsors and clients as they collaborate in the design and delivery of new business systems. This methodology is designed to be consistent with the Project Management Institute’s (PMI®) *A Guide to Project Management Body of Knowledge (PMBOK®)* as well as with the Agile Alliance’s *Agile Manifesto* (where appropriate), while meeting the unique needs of project management at Texas A&M IT. It should apply equally well and meet the requirements of projects large and small. Additionally, this methodology is intended to facilitate compliance with state, system and university rules (i.e. TACs, SAPs).

Various templates are available to support this methodology; they are referenced throughout this document. This document describes in detail the process that Texas A&M IT intends to use during the initiating, planning, managing (controlling and executing), and closing stages of technology projects.
PHASE 1 – PROJECT INITIATION

Projects develop for various reasons. The selection process is carried out during initiation. The initiation process is the time, within the lifecycle of a project, when the project idea is defined, evaluated, and authorized. Each line of business within Texas A&M IT is responsible for submitting proposed projects to the Project Review Board (PRB). The PRB is a standing agenda item within the Executive Leadership Team’s (ELT) standing cadence. During the PRB meetings, each submitted project will be analyzed in terms of financial, strategic and technological imperatives to determine which resources are needed and if the project is feasible given available resources. This process gives management and other stakeholders an opportunity to validate the project’s potential benefits realization.

The amount of effort that goes into the Initiation Phase of a project will depend in some part on the size, complexity and resources required of the proposed project. We generally will need to know more about big projects that represent substantial investment than about small ones. The total effort required to complete the Initiation Phase may range from hours to weeks.

1. Governance Model

Governance at Texas A&M IT is facilitated at both the Portfolio and Project levels. The Project Review Board (PRB), mentioned above, is chaired by the Vice President and Chief Information Officer (or designee); its purpose is to review and manage project prioritization and execution decisions that affect IT and our Clients. For active projects, it also provides a forum for any project changes, risks or issues that require discussion and/or resolution by the PRB group. The group meets bi-monthly as an item on the Executive Leadership Team (ELT) agenda. Additionally, a Portfolio Management Board (PfMB) is responsible for governance across the entire Texas A&M IT portfolio.

2. Project Prioritization Process

To help ensure that IT effectively uses its resources to meet high-priority university needs, Texas A&M IT and the PMO have established a prioritization process for technology projects requiring IT resources. The current process utilizes several criteria to objectively rank projects to prevent and/or minimize resource constraints.

<table>
<thead>
<tr>
<th>Business Driver</th>
<th>Complexity Level</th>
<th>Level of Effort</th>
<th>Executive Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>University or IT Strategic Plan (3)</td>
<td>3+ (3)</td>
<td>6+ mos (3)</td>
<td></td>
</tr>
<tr>
<td>IT Governance Endorsement (3)</td>
<td>2 (2)</td>
<td>1 – 6 mos (2)</td>
<td></td>
</tr>
<tr>
<td>Compliance (2)</td>
<td>1 (1)</td>
<td>&lt;1 month (1)</td>
<td></td>
</tr>
<tr>
<td>Operations (1)</td>
<td></td>
<td></td>
<td></td>
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</table>
Example Matrix

<table>
<thead>
<tr>
<th>Project</th>
<th>Business Driver</th>
<th>Complexity Level</th>
<th>Level of Effort</th>
<th>Executive Priority</th>
<th>Project Rating</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project a</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>(1)</td>
<td>27</td>
<td>1</td>
</tr>
<tr>
<td>Project b</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>na</td>
<td>8</td>
<td>2</td>
</tr>
<tr>
<td>Project c</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>na</td>
<td>1</td>
<td>3</td>
</tr>
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</table>

Prioritization Workflow

Project is given a complexity level in the demand workflow.

If the complexity level is a 1-2 then the project goes to the PRB @ ELT for prioritization.

If the complexity level is a 3-4 then the project goes to the PfMB for prioritization.

These review boards will be utilizing a prioritization matrix.

Portfolio Manager then sets priorities in ServiceNow based on Project Rating.

• Each project is given a score in each of the four weighted categories. Each score is then multiplied together resulting in the Project Rating.
3. **Initiate Project Request**

ServiceNow is utilized in order to initialize a project request. The requestor (either A.D., Project Coordinator, or PMO representative) will submit a request for a new demand through ServiceNow’s Demand Management menus.

All project requests are assigned to the Texas A&M IT PMO for demand management. Upon completion of all required documentation (e.g. Business Case information), the demand will be added to the agenda of the next PRB meeting as a “New Project Request”.

Appendix G will outline the Project Request Process in ServiceNow under “Entering a Demand”.

Enter a New Project Request here: [Open New Demand](#)

4. **Perform Sizing/Scoping**

Using the [Project Complexity Chart](#), the project manager or project coordinator should meet with the Associate Director, assigned IT resources, and/or other necessary personnel to determine project size. A member of the PMO is available to assist with the initial sizing and scoping. The Complexity Chart should be uploaded to ServiceNow as an attachment to the Demand.

5. **Project goes to PRB for Review**

Once the project manager or project coordinator has completed the Project Sizing matrix and uploaded matrix into ServiceNow, they should “Submit Demand”. This will signal to the Demand Manager that the project is ready for review. The Demand Manager will review the project, if additional information is not required the project will be added to the agenda for the next PRB meeting. During the PRB, the Board will discuss the cross-functional nature of the project. If no concerns are raised, the project will be marked “Approved”. If resources are not available, the project may be assigned a later date for re-evaluation, or even deferred to a later date.

6. **Project Manager is assigned to the new “Active” project**

At the conclusion of the PRB, approved demands will be converted to a project, and the demand “closed”. A project manager or coordinator is assigned at that time. The assignment of a PMO PM is usually made by the PMO manager and is dependent on the PM’s expertise, their current project workload and/or by client request. Project Coordinator assignment will be made by the Associate Director. This project manager may or may not be the PM that performed the sizing and scoping in the Initiation Phase.

If you are outside of the PMO and managing a project, please contact the PMO compliance coordinator and we will grant you access to required tools, templates & artifacts.
7. Schedule a Kick-off Meeting – (required for Levels 3 and 4)

At this point, all required initiating documents have been created and the project manager is ready to schedule the Kick-off meeting for the project. All team members and other stakeholders should be invited. The scope should be discussed to ensure everyone understands the purpose and extent of the project. Tasks and time expectations should be set. With the scope document and the task list, the project manager should have the materials needed to successfully run this meeting.

Kick-off Meeting PowerPoint Template

8. Program Management

The project may fall under a Program which is defined as:

A group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may include elements of related work outside scope of the discrete projects in the program.

Programs usually utilize a team of resources already assembled and accustomed to working together on similar tasks. Timelines and deliverables may be interdependent and coordinated and communicated by a single Program Manager. Programs help to ensuring no duplication of work occurs across separate projects.

Characteristics of Programs

- Business change
- Significant change in the organization
- Longer in duration than projects
- Multiple projects run during the same time period
- Can have multiple Project Managers reporting project status to a Program Manager
- Benefits can be received through the duration of the Program
- Often linked to an IT or University strategic initiative
PHASE 2 – PROJECT PLANNING

Project planning follows the project initiation phase and is considered to be the most important stage in project management. Project planning is not a single activity or task. It is a process that takes time and attention. Project planning defines the project activities and describes how the activities will be accomplished. Time spent up-front identifying the proper needs and structure for organizing and managing projects saves countless hours of confusion and rework in the managing (execution and controlling) phase of the project.

The purpose of the Planning phase is to:

- More clearly define project scope
- Obtain sign-off on scope
- Establish more precise schedule of the project (including a list of deliverables and delivery dates)
- Establish named resources based on skillsets identified during sizing & scoping
- Plan for possible purchases and acquisitions

Project planning helps ensure a project’s success by making sure all players know the purpose of the project and the extent of the workload and time expectations. Based upon the size and complexity of a project, there are some documents that may not be required. However, some documents are required for all projects.

1. Finalize Project Charter (required for all projects)

The development of a project charter provides the basis for future project decisions and is required for all projects. This statement is of singular importance to the project because it sets the overall guidelines as to the size of the project. The content of this document, at a minimum, will include the following:

- **Project Purpose:** The statement of need/opportunity should explain, in business terms, how the proposed project will address specific needs or opportunities. Typically, satisfaction of a need or opportunity will provide specific benefit to the organization. May want to also include Strategic Direction Cornerstone, Client Priority List, etc.
- **Project Timeline:** Proposed start and end dates for Project Phases (e.g., Initiation, Planning, etc.) and other major milestones
- **Deliverables:**
  - **Project Objectives** - Are the specific goals of the project. Project objectives, if properly defined and met, will lead directly to accomplishment of the Business Objectives. While Business Objectives relate to the goals and objectives of the organization, Project Objectives relate specifically to the immediate goals of the project. For example, the project goal “implement a new time tracking system” has no value in and of itself. That goal only brings value to the organization when it leads to accomplishment of the Business objective (e.g. “Reduce costs and improve productivity through improved resource management”).
- **Project Value:** How does this project reduce costs, drive efficiency, and/or add value?
- **Estimated Work Effort:** List the time estimated to complete the project in hours or FTE percentages
• Approval by Sponsor and Key Stakeholders.
  After meeting with the Sponsor, AD, and/or Technical Lead, the Project Manager/Coordinator will complete the Project Charter Document.

2. Create a Work Breakdown Structure (required for Levels 3 and 4)

A Work Breakdown Structure is a visual representation of the work required to produce the project deliverables. The creation of a WBS is an effort to breakdown the deliverables into smaller manageable work packages. The work referred to in a WBS is not an activity but the work products or deliverables from an activity or group of activities. The WBS, though created in the planning phase may be essential in scope management during the managing phase. The PMO has created different Work Breakdown Structure (WBS) templates formats for use in Project, Excel, Word, or Visio.

3. Create Roles and Responsibilities (RACI) Documentation (required for Level 4)

Identify Specific Resources for each Required Skill Set

During the initiation phase, the list of required skills needed was documented in the sizing/scoping document. During the planning phase, specific resources are named for each of those required skills if not previously identified. Negotiation of time commitments may need to occur with respective administrative managers. This is usually done in the PRB meeting in which the project becomes “Active”. The outcome will be the list of the project team members.

Identify Other Resource Requirements

All Project Teams require the tools to successfully perform the tasks assigned. In scheduling resources, the Project Manager must ensure that both people and the equipment necessary to support those people are available simultaneously.

Schedule a recurring time and location for the project team meeting

Try to schedule the project team’s status meeting on a regular frequency, such as weekly, bi-weekly, or monthly. Find a location that is conducive for the majority of the project team members or is close to the equipment/labs that may be needed. Teague, TAES and the GSC have conference rooms that can be scheduled through our email calendaring tool for these meetings. For assistance in scheduling conference rooms, please see one of the project managers or the IT Administrative Assistants.

4. Create Project Work Schedule – (encouraged for all projects, required for Levels 3 and 4)

The project schedule (or tasks list) provides the capability to track progress on the project and provides a mechanism to set expectations for what is expected from whom and by when. Some of the tools used at Texas A&M IT for creating a project schedule are:

- Microsoft’s Project - provides the capability to include dependencies, to track the critical path, and to run various reports including major milestones and resource usage.
- Microsoft Excel or Microsoft Word tables - could be used for less complex projects.
- ServiceNow – provides multiple capabilities, including project scheduling, visual task boards, and notifications.
Google also provides project tools that can be used. Each line of business may utilize project tools best suited for their area. ServiceNow is the official Project Portfolio Management (PM) tool of Texas A&M IT is ServiceNow, as well as the official PM tool for the PMO.

**Steps to create a project schedule:**

1. **Identify Activities and Activity Sequences based on Project Scope and Deliverables**
   a. Start with high-level milestones and decompose into manageable chunks of work.
   b. Be sure to include tasks for the entire project, including requirements, design, implementation, transition management, testing, training, installation, and maintenance.

2. **Estimate Activity Duration, Work Effort, and Resource Requirements**
   a. Make sure smallest block of work can be done in a manageable amount of time.
   b. Perform high-level resource work-load balancing to make sure everyone on the project has work and that no one is overloaded.

3. **Determine any Activity Dependencies** – there are often relationships between tasks.

Texas A&M IT has managed some projects utilizing some of the Agile or SCRUM methodologies. These projects also have a project schedule but due to their more cyclical nature, they will follow the sprint timeline.

4. **Stakeholder Analysis (encouraged for Level 4)**

The stakeholder analysis involves identifying stakeholders and analyzing the stakeholders’ impact or influence on the project throughout the project’s lifecycle. A stakeholder analysis may be instrumental in creating a communication plan and developing your requirements documentation for the project.

5. **Requirements Document (required for Level 4)**

Requirements are what the stakeholders need from a project. Requirements should focus on solving problems and achieving the project scope. Types of requirements that may need to be collected include but are not limited to: Business, Functional, non-functional, quality, and transition. The PC/PM will need to decide on a technique(s) to collect requirements (i.e.: facilitated workshops, interviews, focus groups (SMEs), surveys, group activities, prototypes, wireframes, benchmarking, document analysis).

6. **Requirements Traceability Matrix (encouraged for Level 4)**

The requirements traceability matrix helps link the requirements to the objectives and / or other requirements to ensure the project goals are accomplished. Defining the requirements during the planning phase will help manage the scope of the project if any issues or changes a PC or PM may encounter during the managing phase.

7. **Create Risk Register (required for all projects)**

A risk register is a log of events that could occur, a probability and impact score, an owner, and a response. Texas A&M IT has configured ServiceNow to serve this function.
Risk management plan – encouraged for Level 4

Uncertainty occurs on every project. A risk management plan provides a framework to track risk events (both positive and negative) on the project.

8. Create Project Communications Management Plan (required for Level 4)

Communications planning involves defining the information needs of project stakeholders and team members, as well as identifying which people need what information, when it will be needed, and how they will get it. Communication is the cornerstone of how work gets done among different parties within a project and is a critical component in the process. For complex or cross-divisional projects, a formalized communication plan may be needed. On these projects, please coordinate with Product Strategy & Communications (PS&C).

9. Training Plan (encouraged for Level 4)

After implementation of a project user(s) may require training. Creating a training plan will help identify the audience(s), determine who will train, cost of training, training scheduling, and delivery methods of the training. Training may be essential for project’s implementation to be accepted by the user group.

10. Status Report – (required for all projects)

A project status report should be created through the ServiceNow “Status Report” tab. Reporting the overall health of the project, schedule, cost, resources, and scope. While it is encouraged that all projects have a weekly status report, it is required monthly for Levels 1 and 2, bi-weekly for Level 3 and weekly for Level 4. Project budget/scope/schedule overruns in excess of 5% must be reported to CIO.

11. Create the Other Project Documents

The Issues Log, Decision Log, and Change Control process are vehicles for project information distribution. There should be Agendas, Minutes, and Status Reports as well. Setting up these documents is very important for more complex projects and cross-divisional projects. They are put in place during the planning phase and will be used throughout the Execution and the Monitoring/Control Phases. These documents should be stored in the project folder in a collaborative space so that everyone has access to them. (e.g. Google Drive, S:/ Drive, etc.). Templates are available for items listed below on the ITNet.edu.

Issues Log - (optional for Levels 1 and 2, encouraged for Level 3 and required for Level 4)

The purpose of the issue management process is to provide a mechanism for organizing, maintaining and tracking the resolution of issues that cannot be resolved at the individual level.

Decisions Log - (optional for Levels 1 and 2, encouraged for Level 3 and required for Level 4)

The purpose of the Decisions Log is to provide a mechanism to document all major decisions that are made on a project. On a large project, management and the team will make many decisions. It is very important to keep track of everything you have agreed upon. It should include, at minimum, description of the decision, what date the decision was made, who agreed to the decision, and why the decision was made.
Change Management Plan/Log – (optional for Levels 1 and 2, encouraged for Level 3 and required for Level 4)

The purpose of the Change Management Plan and Log is to manage all changes to the scope of the project. The process should include documentation of requested changes to the scope, determination of impact of changes to the project timeline, resources, and budget, and define the review/approval process for a change. (Current PMO templates can combine Issues, Decisions and Changes into one “master” log.)

Executive Status Report – (required for Levels 3 and 4)

An executive project status report provides management with an accurate assessment of the current project state. The report should provide information on the project description, project health, scope, and list project decisions, risks, and issues. The report should be created and distributed at least monthly for Level 3 project and bi-weekly for Level 4 projects. Project budget/scope/schedule overruns in excess of 5% must be reported to CIO.

Agenda for Meetings – (encouraged for all projects, required for Levels 3 and 4)

Every formal meeting should have an agenda prepared prior to the meeting. Depending on the attendees and size, this can be done via email. It is recommended that the agenda be distributed to the participants prior to the meeting.

Meeting Minutes – (encouraged for all projects, required for Levels 2, 3 and 4)

Minutes of the meeting should be documented for all project meetings. These minutes can be captured in email, Google Docs, Google Sites or other means. These minutes provide an effective way for participants to know the status from each meeting. The minutes can be particularly beneficial to team members or management that were unable to attend the meeting.
PHASE 3 – PROJECT MANAGING (EXECUTION & CONTROLLING)

Once a project moves into the Managing (Execution & Controlling) phase, the project manager’s main focus during this phase shifts to monitoring the work being done. Managing the project plan ensures that planned project activities are carried out in an effective and efficient manner. A missed activity finish date may require adjustments to the entire project schedule, resource staffing, and other impacts.

1. Manage Scope

Scope control is a straightforward concept. The intent of implementing a scope control process is to identify and manage all elements (e.g., people and requirements) inside and outside of the project that increase or decrease the project scope beyond the required or defined need of the original, agreed-upon project Scope Statement.

Scope changes will come from the perceived need for a change in a project deliverable that may affect its functionality and in most cases the amount of work needed to perform the project. A scope change is a very crucial occurrence.

A scope change could require a change in resources, time, and/or project funding. All scope change requests should be submitted in writing using the change control process and form. The Project Manager will review the change with the project sponsor and other major stakeholders to determine that the change is necessary and the additional resources are available. Any changes that are agreed upon must be approved by the project sponsor, technical lead, and/or clients as a matter of formal scope control. This can be an email or a change of scope document. A change of scope may cause changes to be made to other project documents such as the schedule/task list and budget. All changes must be communicated to the project team and stakeholders.

2. Manage Schedule

Schedule control is one of the most important activities within project control. It is important for the Project Team to know where the project stands with respect to project schedule (i.e., Is the project ahead of, or behind, schedule, or what tasks do I need to complete by what date?). It becomes key for Project managers to obtain statuses from the team members on a regular basis.

As part of the status collection, the Project Manager should:

- Validate that task start and end dates are still accurately reflected.
- Validate that task dependencies (or relationships) are still valid.
- Validate work effort (or task duration) is still valid in the schedule. If this changes, obtain accurate start and finish dates of completed tasks or estimates to complete work for ongoing tasks.

Schedule control is something that typically is managed at the project level by the Project Manager or Coordinator. However, it is very important to make the client aware that a schedule change has occurred. Furthermore, the client needs to be made aware of what is being done to fix the issue and the impact it will have on the project’s performance and deliverables. It is a good practice for Project Managers to hold regular project schedule reviews.
It is standard practice to baseline the schedule at the start of the project. This allows all schedule changes to be displayed against the original project schedule. If schedule slippage becomes severe it may be advisable to re-baseline the project. As this involved change to one of the project baselines, it should only be done through a formal Change Control Process.

3. **Manage Issues**

The Issue Management process should give everyone involved with, or affected by, the project a way to report issues or problems. The Issues Log format provides fields for documenting the problem, assessing the impact of the problem, making recommendations and determining the cost (people and assets) and time required for resolving the problem.

Any of the Project Team members, customers, or Stakeholders can submit an issue. This will be recorded on an Issue log or meeting minutes. All issues should be reviewed on a regular basis (e.g., in the project status meetings, since this group will typically meet on a weekly or biweekly basis).

Typically, when the issue or problem has been resolved and verified, recording the actual date the problem was resolved and the approval authority closes the issue. Some issues may need executive management approval. The appropriate processes will be followed to update contracts and baseline documents.

4. **Manage Communications**

The project Communications Plan is an important factor in the Managing phase. A large part of a Project Manager’s responsibility during this stage of the project is keeping the Stakeholders informed of project status. There are many facets to project communications. Some examples follow:

- Generate status reports to the team and perhaps to executives on a regular basis.
- Meeting minutes should be made available to Stakeholders along with any “Action Items” that may have been generated during the meetings.
- The project schedule and other project documentation should be available to the Stakeholders.
- Hold regular status meetings.
- In addition to these formal communications, a Project Manager should also stay in communication with the team on an informal basis. Informal discussion is sometimes the best way to determine team morale, true project status, looming difficulties, etc.

5. **Manage Cost**

Projects may fail to control costs, or go over budget, for many reasons. Often it is not a single problem but a series of small problems that, combined, permit cost control to be sacrificed and prevent the project from being completed successfully. Project Managers should monitor the costs as outlined in the Procurement Plan. If costs increase, the PM should search out the “why” and take appropriate action and inform the stakeholders of the authorized changes. Cost control is not simply a reporting process.

Texas A&M IT and each of its lines of business will have a defined set of guidelines and policies that provide the infrastructure for project purchasing that should be integrated within the Procurement Plan. These guidelines will outline the policy for solicitation, source selection and contract administration. Although the solicitation and contracting responsibilities may not always be managed by the Project
Manager, it is still important that the Project Manager have a fundamental understanding of the department’s contracting and procurement policies.

The Project Manager may be responsible for ensuring that the vendors, once contracted to do the work, meet the contractual agreements specified within their contracts. Project Managers will also be responsible for tracking, reviewing and analyzing the performance of contractors on a project. This performance reporting will be the basis for any contractual changes that need to be made during the life of the contract. Finally, Project Managers may play an important role in oversight and review of any contract changes that will affect the project.

6. **Manage Risk**

Risk identification, monitoring and resolution are important tools for successfully completing a project. All projects need a Risk Register, documenting known risks and any responses for those risks. One type of risk on IT projects is the development and implementation of technology equipment and software that might become obsolete very quickly. Technology is evolving rapidly with increases in speed and capabilities. Accordingly, risk is increased when implementing high-dollar or homegrown technology systems. To alleviate this issue, the Project Manager must make sure that the efforts of the Project Team are aligned with the technology and business strategy of the department. Researching future needs, capabilities, and integration requirements of the products will be helpful.

7. **Manage Quality**

Quality assurance incorporates a process of evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards. Quality control should be performed throughout the project. Project results include both product results, such as deliverables, and management results, such as cost and schedule performance. Quality control is often performed by user acceptance testing. During User Acceptance Testing, Clients should identify how the results will be verified. Depending on the nature of the project, it is recommended that the Client develop a Testing Plan that includes Test Scripts, Testing Schedule, and Testing Signoff.
PHASE 4 – PROJECT CLOSEOUT

The last major stage of a project’s life-cycle is project closeout. Project closeout is completed once all defined project tasks and milestones have been completed and the customer has accepted the project’s deliverables.

Project closeout includes the following key elements:

- Verification of formal acceptance by Stakeholders and the PRB
- Re-distributing resources (staff, facilities, equipment and automated systems)
- Closing out any financial issues such as labor charge codes and contract closure
- Documenting the successes, problems and issues of the project
- Documenting “lessons learned”
- Celebrating project success
- Completing, collecting and archiving project records.
- Informing Administrative Coordinators to include the Project/Project Team in the next scheduled Rewards/Recognition event.

These activities are particularly important on large projects with extensive records and resources.

1. **Prepare Project Closure Document (encouraged for Level 3 and required for Level 4)**

   The purpose of the Project Closure Document is to get verification and signoff from the Client that deliverables identified in the Scope document are complete. If for some reason there was a deliverable that was not completed, that should be noted and the reason why. The Project Closure Document is reviewed in the Project Closure Meeting. Also, during the meeting Lessons Learned are identified and documented.

   **All projects require the documentation of Lessons Learned via the ServiceNow form.**

2. **Conduct Final Project Closure Meeting**

   The issue of primary importance with project closure is the acceptance of the product or project deliverables by the customer for which they were created. The best way to ensure this is to convene a final meeting with all necessary Stakeholders to review the Scope deliverables against the baseline requirements and specifications. Furthermore, any open action items or program level issues can be officially closed or reassigned to the support organization.

   By drawing all of the Stakeholders together in a single meeting, the Project Manager avoids clearing up open issues on an individual basis. The final deliverable of this meeting should be the Project Closure Document created by the Project Manager describing the project’s final deliverables in comparison with the authorized project baseline documents. Approval is verified via the signature of a project closure document by all of the Stakeholders who signed the original project scope documentation. This document will be customized to the particular project to include pertinent deliverables, key features and important information about final product delivery.

   The Final Project Closure Meeting should include all project stakeholders.
3. **Documenting Lessons Learned (required for all projects)**

For every project, it is important to follow a process for lessons learned: Identify, document, validate, disseminate and archive. Utilizing this process promotes the recurrence of desirable project outcomes and minimizes the recurrence of undesirable project outcomes. Documenting and disseminating lessons learned bolsters continuous improvement through improved work processes, operations, and cost effectiveness.

Formally conducted lessons learned sessions are part of Phase 4, Project Closeout. Some project teams choose to document lessons learned throughout the project’s duration while others wait for the lessons learned session at project closeout.

The lessons learned session should include, at minimum, the project team, key stakeholders, and any project support staff. Examples of questions to cover during lessons learned sessions are:

- Did the project finish on time? If not, why?
- Was the customer satisfied with the end product?
- Were requirements and goals of the project met? If not, why?
- Did the project remain within budget? If not, why?
- Did the project management methodology work? If not, why?
- What could be done to improve the process?
- What roadblocks or challenges were experienced that impacted the project?

4. **Project Documentation Archiving (required for all projects)**

Historical project data is an important source of information to help improve future projects.

The specific information archived for a project will vary; however, the following project data are archived:

- Project Scope Statement
- Estimating Worksheet
- Correspondence
- Meeting notes
- Status reports
- Project Closure
- Technical documents
- Other documents/information.

All hard-copy records should be stored following standard Texas A&M IT record-retention guidelines. We currently store all closed project files in Laserfiche, within the PMO’s folder structure. Many of the technical records and automated versions will be turned over to Texas A&M IT personnel responsible for maintenance and operation of the system. Summary technical information should be electronically stored for historical reference to facilitate later review.

This is required for all projects, including those run by project managers outside the PMO. If you are a project manager outside the PMO please contact the PMO compliance coordinator who can assist you with archiving project documentation.
EXCEPTIONS AND EXCLUSIONS

1. Construction Initiatives

Projects engaged-in by Texas A&M IT, but managed via a third-party vendor (e.g. FP&C, SSC) for the purposes of campus construction are exempt from the methodology as written. In place of the full methodology, these initiatives are required to:

   a. Utilize the modified demand management process, visually depicted here, inclusive of formal approval of projects prior to the submission of bids and entering into of contracts,

   ![Diagram of modified demand management process]

   b. Utilize a custom charter template, specific to FP&C/SSC construction projects,

   c. Generate, at least monthly, a Project Status Report as outlined within this methodology,

   d. Attach all project documentation into the ServiceNow PPM tool

2. Specific Exclusions:

   1) Business Case, Risk Register and Project Schedule are not required

   2) Construction projects are not required to be reported as Major Information Resource Projects (MIRPs)
APPENDIX A

Definitions

**Enterprise IT project portfolio**

The enterprise IT project portfolio is the combination of all agency project portfolios to provide an enterprise wide view of all IT projects. It is important to note that that term does not mean only a portfolio of projects that impact or serve the whole enterprise.

**Operational activity**

Operational activity refers to ongoing and repetitive tasks whose purpose is to maintain existing systems.

Examples include but are not limited to incident tickets, requests for service, routine maintenance requests.

**Program**

A program is a collection (2+) of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually. Programs may include elements of related work outside scope of the discrete projects in the program.

**Project**

A project is a temporary endeavor undertaken to create a unique product, service or result. An information and telecommunications technology project means an effort to acquire or produce information and telecommunications technology systems and services.

It has a starting date, specific goals and conditions, defined responsibilities, a budget, a plan, a fixed end date and multiple parties involved.

For registration purposes it has a total expected project cost (that includes direct staff costs, all supplemental contract staff and vendor costs, and costs of hardware and software development or purchase) that is greater than or equal to $500K.

Examples include but are not limited to, developing a new product or service, developing or acquiring a new or modified information system, upgrades, and releases.

**Project Management Methodology (PMM)**

Is the collection of processes, tools, templates and approaches intended to drive efficiency and consistent project delivery. It is designed to meet the needs of all segments of the organization as they engage in technical project work. It serves as a guide to the organization in project selection, to project teams in planning work, to management in providing oversight, and to sponsors and clients as they collaborate in the design and delivery of new business systems. It should apply equally well and meet the requirements of projects large and small.

**Project Portfolio Management (PPM)**

The coordinated management of the processes, methods, and technologies used by project managers and project management offices (PMOs) with the intent of enabling analysis and management of multiple concurrent proposals & initiatives. Objectives of PPM include demand management/proposal approval, prioritization, standardization & efficiencies of scale and repetition, resource management, financial management, in order to realize organizational strategic and operational goals.
*Portfolio Manager (PfMgr)*

The person responsible for the oversight of the project portfolio management process and methodology. Additionally, the PfMgr analyzes the organization’s projects to evaluate project status & execution to ensure each initiative is still aligned with the expected benefits.
APPENDIX B

Project Portfolio Management (PPM)

Monthly Status Reporting Procedure

All projects registered in PPM must have project status information updated at least monthly. Additionally, project managers and project coordinators should review all project information to ensure accuracy. A change that may impact the accuracy of project information includes, but is not limited to the following:

Integrated change control

Change in project phase or project state
Progressive elaboration of project deliverables (for example: after the Project Charter is complete, funding sources may be different than when the project was proposed)

Who updates project status?

The Project Coordinator or Project Manager is responsible for posting project status information on ServiceNow by end of the day, the first calendar day of the month.

Required Fields – Completed when Creating a Project (ServiceNow Demand)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Submitted By</td>
</tr>
<tr>
<td>Category (Strategic vs. Operational)</td>
<td>Assigned to (should be who will manage the project)</td>
</tr>
<tr>
<td>Type (should be Project)</td>
<td>Demand Manager (Should be William Pace)</td>
</tr>
<tr>
<td>Portfolio</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
</tr>
</tbody>
</table>

Monthly Reporting – Fields Required for Status Updating

Project budget/scope/schedule overruns in excess of 5% must be reported to CIO.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Date</td>
<td>Schedule Status</td>
</tr>
<tr>
<td>Overall Health (Red, Yellow, or Green)</td>
<td>Comments on Schedule</td>
</tr>
<tr>
<td>Cost Status</td>
<td>Comments on Cost</td>
</tr>
<tr>
<td>Resources</td>
<td>Comments on Resources</td>
</tr>
<tr>
<td>Overall Status Comments</td>
<td>Scope</td>
</tr>
</tbody>
</table>

1. Updates are recorded for the project activities within the last month only.
2. How to write your project activities?
   a. Use verb, object/subject of important high-level activities
   b. Use past tense verbs because these are past accomplishments.
3. Do not submit a “journal” of everything you and your team did (such as “conducted team meeting, worked on project schedule.”) There is a spacing constraint. If the data is too long, you risk not being able to read all your project activities listed in the status report.
4. In general, try not to use pronouns or personal names.
   Example: If referring to something you accomplished, it should be written in the past tense as in the following:
   “the project manager has/did/planned or, the Business Analyst recommended,” etc.
Project Health Scale

The following recorded fields require a color scale: Overall Status
Budget Status Schedule Status Scope Status Risk Status Issue Status Status Control Status

Mark each field with the appropriate color that reflects the project status below:

<table>
<thead>
<tr>
<th>Project Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="green.png" alt="Green" /> (GREEN)</td>
<td>The project is performing within the scope, budget, and schedule tolerances set by the project delivery team.</td>
</tr>
<tr>
<td><img src="yellow.png" alt="Yellow" /> (YELLOW)</td>
<td>Recognized risks with the project that require monitoring by the project manager and delivery team. Projects in this status may have risks that evolve into issues, but these issues can be resolved within the confines of the project team.</td>
</tr>
<tr>
<td><img src="red.png" alt="Red" /> (RED)</td>
<td>Significant issues with the project that require corrective actions through escalation to either the Project Sponsor or Executive Leadership. Project budget overruns in excess of 5% must be reported to CIO.</td>
</tr>
</tbody>
</table>

Comments

Any time you report Red or Yellow status, in the above seven status fields you must state why the status is at risk in the Comments section. Consider including the following:

- List any current major issues
- List any major risks (with mitigation strategy if known)
- Always review your comments area and delete those comments that do not apply to the current reporting period.

Non-Green Statuses

Any time a project component (e.g. scope, schedule, budget, etc.) slips to yellow or red, as defined above, the entirety of the project should be recorded as that color.

Date Status Updated

Change this date each reporting time period the information is updated. This date verifies that the information given in this report has been updated by the project manager in the current reporting period.

Monthly Reporting – Review and update fields as needed

Although information in other PPM fields may change, the following fields typically need to be updated throughout the lifecycle of every project:
<table>
<thead>
<tr>
<th>Total Cost</th>
<th>Planned Finish Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Phase</td>
<td>Project State</td>
</tr>
</tbody>
</table>
APPENDIX C

Project Coordinator Program

The project coordinator program (P.C.) supplements and enhances Texas A&M IT’s ability to manage projects. It is dependent on functional, technical and/or subject matter experts to engage in project management processes in addition to their normal work duties. This is compared to the PMO project managers; whose primary role is to manage project work.

Definition

A project coordinator is:

- Identified by an Associate Director,
- Reports into that AD’s line of business (LOB),
- Trained in project management,
- Responsible for managing project work

The role and responsibilities of a Project Coordinator are usually a subset of that of a Project Manager. The primary responsibility of a project coordinator is to keep the project and all related processes running smoothly.

Training

Project Coordinators (P.C.) have a variety of training tools to help facilitate and guide their project work.

- This guide – The purpose behind this methodology document is to provide high level support of the basic principles that should be applied at Texas A&M IT.
- Requests for edits, updates or additions should be forwarded to PMO@TAMU.EDU
- In-Person - The Project Management Office (PMO) will hold regularly scheduled training sessions to assist with project management practices, methodology questions, and tool (ServiceNow) usage. These In-Person sessions will be scheduled in advance and communicated through email and Slack communication channels.
- Online - The PMO has identified several courses available at no cost through Lynda.com. These include:


- Mentorship / Coaching - The PMO staff have each been assigned an Associate Director (and their staff) to work with in terms of coaching, mentorship, and PPM assistance. The PMO will conduct regularly scheduled (at least monthly) meetings. To identify your line of business’s PMO partner, please email PMO@TAMU.EDU.
Communications

Project Coordinators should engage in regular and periodic communication events. At a minimum, the expectations for communications from Project Coordinators are:

- Attend a PMO/P.C. meeting at least once per quarter.
  - These will be announced and scheduled well in advance to work towards maximum schedule availability
- Communicate at least monthly on the status of your project
  - This can be accomplished through ServiceNow’s functionality, detailed in Appendix G.
- Communicate at least weekly to the Project Sponsor (Associate Director)
  - This can be accomplished through ServiceNow’s functionality, detailed in Appendix G.
  - Alternatively, Project Status Report templates are available from the PMO.
APPENDIX D

A Project Manager’s Daily Responsibilities

A Project Manager’s daily responsibilities may include some or all of the following:

- Provide day-to-day decision-making on critical project issues as they pertain to project scope, schedule, budget, methodology and resources
- Provide direction, leadership and support to Project Team members in a professional manner
- Ensure project documentation is complete and communicated (e.g., scope statement, project schedule, requirements, testing and others)
- Manage the planning and control of project activities and resources
- Assist with the management of project contracts with vendors
- Report project components status and issues to the project Sponsor and Client
- Provide teams with advice and input on tasks throughout the project, including documentation, creation of plans, schedules and reports
- Resolve conflicts within the project between resources, schedules, etc.
- Influence Stakeholders and team members in order to get buy-in on decisions that will lead to the success of department projects
- Delegating responsibility to team members.
APPENDIX E

The Three Constraints in the Project Management Triangle – Time, Cost, and Scope

1 - Time (Schedule)
Time is a crucial factor which is uncontrollable. On the other hand, failure to meet the deadlines in a project can create adverse effects. Most often, the main reason for organizations to fail in terms of time is due to lack of resources.

2 - Cost
It's imperative for both the project manager and the organization to have an estimated cost when undertaking a project. Budgets will ensure that project is developed or implemented below a certain cost. Sometimes, project managers have to allocate additional resources in order to meet the deadlines with a penalty of additional project costs.

3 - Scope
Scope looks at the outcome of the project undertaken. This consists of a list of deliverables which need to be addressed by the project team. A successful project manager will know to manage both the scope of the project and any change in scope which impacts time and cost.

Quality
Quality is not a part of the project management triangle, but it is the ultimate objective of every delivery. Hence, the project management triangle implies quality.
APPENDIX F

Scrum/Agile Project Management Methodology

In addition to the PMBOK Project Management Methodology, Texas A&M IT has also adopted the practice of SCRUM on certain projects. SCRUM is a framework that employs various processes and techniques. It is an interactive, incremental approach to optimize predictability and control risk.

The PMO asks that a Project Manager be contacted to assist with deciding if a project meets the criteria for the SCRUM methodology.

To determine if a project should use the SCRUM Methodology, the following questions should be considered:

1. Will resources (IT and Client) be committed to the project more than 50% of their time?
2. Can requirements and tasks be clearly defined and measured in specific intervals of one to two weeks?
3. Will the resources be co-located?
4. Will resources be able to make daily progress on a task?
Scrum Cheat Sheet by agile42

**Product Owner**

*Owns the Product Backlog*

The Product Owner represents the interests of everyone with a stake in the project (Stakeholder) and he is responsible for the final product.

- elicit product requirements
- manage the Product Backlog
- manage the release plan
- manage the Return on Investment

**Scrum Master**

*Owns the Scrum process*

The Scrum Master is responsible for the Scrum process. He ensures everybody plays by the rules. He also removes impediments for the Team. The Scrum Master is not part of the Team.

- manage the Scrum process
- remove impediments
- facilitate communication

**Development Team**

*Owns the software*

The team figures out how to turn the Product Backlog into an increment of functionality within a Sprint. Each team member is jointly responsible for the success of each iteration and of the project as a whole.

- software quality
- technical implementation of User Stories
- delivery of a “potentially shippable” product increment at every Sprint

**Sprint Planning**

*Commit the deliverable(s) to the PO*

Two part meeting. First, the PO presents the User Stories. Second, when the Team thinks they have enough Stories to start the Sprint, they begin breaking it down in Tasks to fill the Sprint Backlog (normally 3 to 4 days of work, than inspect & adapt).

**Timebox**: 4 hours
**Owner**: Product Owner
**Participants**: Team, Scrum Master

**Product Backlog**

*Dynamic prioritized list of requirements*

The requirements for the product are listed in the Product Backlog. It is an always changing, dynamically prioritized list of requirements ordered by Business Value. Requirements are broken down into User Stories by the PO.

*Prioritize the requirements by playing the Business Value game. Buy these at www.agile42.com*

**Daily Scrum**

*Inspect and Adapt the progress*

In this standup meeting the Team daily inspects their progress in relation to the Planning by using the Burndown Chart, and makes adaptation as necessary.

**Timebox**: 15-20 minutes
**Owner**: Scrum Master
**Participants**: Team, all interested parties may silently attend

**Burndown Chart**

*Displays the remaining work*

The Burndown chart shows the amount of work remaining per Sprint. It is a very useful way of visualizing the correlation between work remaining at any point in time and the progress of the Team(s).

*Use a tool such as Agile to automatically create the Burndown Chart. Learn more at www.agile42.com*

**Sprint Review**

*Demonstrate the achievements*

The team demonstrate the PO the result on the developed product - of the Sprint. The PO can accept or reject features depending on the agreed acceptance criteria.

**Timebox**: 4 hours
**Owner**: Team
**Participants**: Scrum Master, Product Owner, optionally the PO can invite other Stakeholders

**Sprint Backlog**

*List of Tasks to fulfill the Sprint Goal*

The Sprint Backlog contains all the committed User Stories for the current Sprint broken down into Tasks by the Team. All items on the Sprint Backlog should be developed, tested, documented and integrated in order to fulfill the Sprint Goal.

*Estimate Story complexity by playing Planning Poker. Buy these at www.agile42.com*

**Retrospective**

*Maintain the good, get rid of the bad*

At the end of a Sprint, the Team evaluates the finished Sprint. They capture positive ways as a best practice, identify challenges and develop strategies for improvements.

**Timebox**: 3 hours
**Owner**: Scrum Master
**Participants**: Team, (Product Owner)

**Potentially Shippable Product**

Scrum requires a: the end of each Sprint that the product is potential shippable to the customer. That means the increment is:

- thoroughly tested and stable
- well-structured
- well-written code
- user operation of the functionality is documented
APPENDIX G

ServiceNow Setting Functions

Notification Subscriptions

To initiate the process in ServiceNow, a new “Subscription” should be created. To create the Subscription, log into ServiceNow, under your name located in the far, top, right-hand corner of the screen, click on your name for the drop down menu.

Select “Profile”.

On the following screen, select “Notification Preferences” in the left-hand corner.

From the Notifications and Subscriptions tabs select “Subscriptions”.

Related Links

Notification Preferences
In the area to the right of the tabs select “Add Personal Subscription +”.

From the selection menu you may add, “Demand created”, “Demand updated”, “Project updated”, “Project created”, or any notification you would like to subscribe to.

You will then want to add filters. The primary filter to add will be the TAMU Assignment Unit filter. Select the “Assignment Unit” from the “choose field drop down menu under the Add Filter Condition.”
Type TAMU in the Search filed.

You may add other filter conditions in this area to narrow the notifications down. Once you have your notifications filters established you will need to name your filter and then click save.
ServiceNow Demand Workflow

Entering a Demand

To initiate the process in ServiceNow, a new “Demand” must be created. To create a Demand, log into ServiceNow, scroll down to Demands, and click “Create New”.

(If you do not have access to this menu, please contact PMO@TAMU.EDU)

In order to submit the Demand, seven (7) fields and the Business Case fields must be completed. The first seven (7) fields include the demand Name, Category (Strategic), Type (of Project), Portfolio (which corresponds to the line of business or functional area), the name of the Submitter, Assigned to (project coordinator), and the Demand Manager (William Pace).

The following fields for the Business Case must be completed: Business Case, Business Need, Impact Analysis, and Proposed Solution. When entering the Business Case fields please contact your PM Buddy if you have any questions.
There is an optional template built into ServiceNow that can be used when filling out the business case. It is only a guideline if needed. It can be accessed by selecting the button with three circles aligned horizontally and then selecting “Toggle Template Bar” in blue.

Then go to the bottom of your screen and select the template link. WARNING: This will overwrite any information you may have already inputted into the business case fields.

After these fields are completed, press Save Draft.

After the demand is saved, the complexity level needs to be determined by using the Project Complexity Chart that can be found in the Project Management Tool Kit on ITNET. Once the document is completed it needs to be attached to the demand using the button with the paper clip icon.

After the document is completed and attached and the two fields are filled out, the demand is ready for submitting. This is accomplished by clicking the “Submit Demand” button.

If you want to be notified as the Demand follows the workflow, you may choose to “Follow”.

After Submitting the Demand, the PMO will work with the Project Coordinators, Associate Directors, and other Subject Matter Experts to Complete the Business Driver fields. Each driver has its own unique set of characteristics that identify “Why are you doing this project?”
Lifecycle – Utilized by DSA
Strategy – Directly related to the Texas A&M or Texas A&M IT strategic plan.
Productivity – Directly related to initiatives intended to increased efficiency or effectiveness of current processes.
WEAVE - Directly related to WEAVE goals
Compliance – Directly related to Compliance goals
Audit Finding – Directly related to the resolution of an audit finding
Risk – Utilized by DSA
Organizational Improvement - Directly related to Continual Service Improvement projects

After the driver fields are completed, save the demand by clicking “Update”

The Demand will be managed by the PMO as a part of the Department’s Project Portfolio Management process. The lifecycle includes stages of Submitted, Screening, Qualified, Approved, and Completed.

<table>
<thead>
<tr>
<th>Draft</th>
<th>Submitted</th>
<th>Screening</th>
<th>Qualified</th>
<th>Approved</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

During these stages, the Demand Manager from the PMO will create a project in ServiceNow.
**ServiceNow Project Workflow**

*Starting a Project*

After the Demand is processed and approved, the Demand Manager from the PMO will create a project via the “Create Project” link.

![Create Project](image)

This automatically generates a PRJ number.

![Project PRJ0015112 has been created](image)

As with Demands, to receive updates on the project, it may be “Followed”.

![Follow, Update, Start project, Delete](image)

Once the Project is created click the “Start Project” button to begin working on the project and to change the project state from Pending to Work In Progress; this will also record the official project start date within ServiceNow.

![Follow, Update, Start project, Delete](image)
**Updating a Project**

Projects are required to be updated at least on a monthly basis. The project status field assigns a color status to the project.

<table>
<thead>
<tr>
<th>Project Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Green" /></td>
<td>(GREEN) The project is performing within the scope, budget, and schedule tolerances set by the project delivery team.</td>
</tr>
<tr>
<td><img src="image" alt="Yellow" /></td>
<td>(YELLOW) Recognized risks with the project that require monitoring by the project manager and delivery team. Projects in this status may have risks that evolve into issues, but these issues can be resolved within the confines of the project team.</td>
</tr>
<tr>
<td><img src="image" alt="Red" /></td>
<td>(RED) Significant issues with the project that require corrective actions through escalation to either the Project Sponsor or Executive Leadership. Project budget/scope/schedule overruns in excess of 5% must be reported to CIO.</td>
</tr>
</tbody>
</table>

The percent complete can be rounded to the nearest 25%. Essentially:

- 25% for projects in the beginning stages
- 50% for projects near the middle points
- 75% for projects nearing completion
- 100% for completed projects

For more specific status reporting, a new “Status Report” should be created on at least a monthly basis. This option can be found near the bottom of the project menu. Click “New” to initiate a new report.

When the New Status Report opens, enter the Status Date. Then fill in the indicators for Overall Health, Schedule, Cost, Resources, and Scope.

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If your project has a yellow status you must leave a comment briefly describing why it is yellow. If your project status is red you must give a description as well as an exact percentage of how much the project has overrun and the Project Management Office will report this to the Chief Information Officer.

Each completed status report will be displayed on the main project screen.
How to change the project phase

Open your project.

Simply select the phase your project is in from the “Phase” drop down menu shown above.

Then click update.
Lessons Learned

For every project, it is important to follow a process for lessons learned: Identify, document, validate, disseminate and archive. Utilizing this process promotes the recurrence of desirable project outcomes and minimizes the recurrence of undesirable project outcomes. Documenting and disseminating lessons learned bolsters continuous improvement through improved work processes, operations, and cost effectiveness.

Formally conducted lessons learned sessions are part of Phase 4, Project Closeout. Some project teams choose to document lessons learned throughout the project’s duration while others wait for the lessons learned session at project closeout.

The lessons learned session should include, at minimum, the project team, key stakeholders, and any project support staff. Examples of questions to cover during lessons learned sessions are:

- Did the project finish on time? If not, why?
- Was the customer satisfied with the end product?
- Were requirements and goals of the project met? If not, why?
- Did the project remain within budget? If not, why?
- Did the project management methodology work? If not, why?
- What could be done to improve the process?
- What roadblocks or challenges were experienced that impacted the project?
For documenting lessons learned within ServiceNow, follow the steps below:

Select the “Lessons Learned” Tab

Select “New”
Enter a “Title” and “Description” (Description should offer a clear and concise explanation of the lesson learned. Documentation can be attached in ServiceNow to augment the description if needed.)

“Impact” - Was the impact of the lesson learned positive or negative? Choose accordingly from the drop down menu. “Project Area” - To which project area does the lesson learned most apply: Scope, schedule, budget, or other? Choose accordingly from the drop down menu.
The ultimate purpose for documenting lessons learned is to provide future project teams with information that will increase effectiveness and efficiency and to build upon the experience gained through each completed project.

<table>
<thead>
<tr>
<th>Lessons Learned Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has a lessons learned session been conducted during Phase 4, Project Closure?</td>
</tr>
<tr>
<td>Have all lessons learned been documented?</td>
</tr>
<tr>
<td>Have documented lessons learned been distributed to the project team, stakeholders, and leadership?</td>
</tr>
<tr>
<td>Have action items resulting from the lessons learned session been addressed/resolved?</td>
</tr>
<tr>
<td>Have documented lessons learned been added to the project's document repository?</td>
</tr>
</tbody>
</table>