



RUTGERS POLICY

Section: 70.2.14

Section Title: Legacy UMDNJ policies associated with Information Technology

Policy Name: Project Portfolio Management Application System Support & Minimum Requirements

Formerly Book: 95-01-05-05:00

Approval Authority: Vice President for Information Technology & Chief Information Officer

Responsible Executive: Vice President for Information Technology & Chief Information Officer

Responsible Office: Office of Information Technology (OIT)

Originally Issued: July 1, 2013

Revisions: 7/1/2013

Errors or changes? Contact: oitpolicy@rutgers.edu

1. **Policy Statement**

Maintenance schedules, upgrade procedures and minimum data input requirements are defined for Rutgers' Project Portfolio Management application.

2. **Reason for Policy**

This policy defines the support procedures and minimum requirements for users of the Project Portfolio Management application.

3. **Who Should Read This Policy**

This policy applies to any individual responsible for the management, operation, and/or maintenance of the legacy UMDNJ information technology services and/or environment. If you are uncertain whether this policy applies to you, please contact your direct supervisor.

4. **Related Documents**

N/A

5. **Contacts**

oihelp@rutgers.edu

6. The Policy

70.2.14 PROJECT PORTFOLIO MANAGEMENT APPLICATION SYSTEM SUPPORT & MINIMUM REQUIREMENTS

I. Responsibilities

The OIT PMO Project Portfolio Management (PPM) Administrator is responsible for maintaining, upgrading and developing the Project Portfolio Management System.

II. Exceptions

Exceptions to this policy must be approved by the management within the Project Management Office.

III. Procedures

The OIT Project Management Office will supply PPM project team members with an electronic system for managing and tracking Office of Information Technology projects to be in alignment with strategic goals. This system will be maintained, upgraded and enhanced to accommodate the needs of the project managers using it.

A. Status

1. PPM Project Managers are required to update the Project status on their projects weekly in the PPM software before each Monday morning.
2. To update the status of a project, use the Status section on the Basic Info tab for the project.
3. PPM team members must report project status to their Project Manager (PM) weekly using the Notes section of their tasks and issues tab. The PM, in turn, uses this information to report overall project status.
4. Along with the Status, the overall health of the project needs to be reviewed and updated if necessary.

B. Attachments

1. Attachments can be added to a Project at the Project level, task level, or issue level.
2. Attachments must be checked out prior to making changes and checked in with a new version number.
3. Once an attachment is checked out, a local copy should be saved so it can be revised and checked back in.
4. If an attachment is checked out by mistake, you can un-do a check out by selecting the 'Undo Check Out' button.
5. Attachments should be checked off as public if they are meant to be viewed by anyone with access to the PPM system.
6. Attachments should not be checked off as public if only the team members on the project should be allowed to view the attachment.

7. File names must adhere to the PMO Naming Convention policy and can be no longer than 65 characters.

C. Issues and Tasks

1. The PPM Project Manager will assign Issues and Tasks to PPM resources.
2. PPM team members are required to check the PPM software for new assignments and maintain existing assignments.
3. PPM resources who have been assigned Tasks and/or Issues are required to enter progress in the Notes area of the item. Attachments can also be added. The Basic Info tab on the item must be updated as needed in the notes section to reflect the progress made.
4. Once a resolution has been proposed, the solution should be outlined in the notes sections for the creator, and the item should then be assigned back to the Creator. Only the Creator can resolve the item and complete the Problem Resolution.

D. Timesheets

1. It is at the discretion of the PPM manager as to whether PPM resources will have to mark their time spent on a project each day under the appropriate project, project task and timesheet as indicated by their project manager.
2. It is recommended, but not required, that Project Team members, including Project Managers, track time to a project.
3. Timesheets should be submitted by each Friday afternoon as appropriate.
4. Past time can be entered on timesheets that are still in progress (not submitted) in the Time/Expense tab in the My Arena tab.
5. Supervisors should try to approve all timesheets by the following Monday.

E. Maintenance

1. During the office hours of 8 am to 4 pm EST Monday through Friday the PPM Administrator can be reached at 732-235-7299 or IST-PMOHELP@umdnj.edu for system requests, including reports, dashboards or filter needs.
2. Regular System Maintenance includes database clean up, field cross maps, and inactivation of resource and user accounts.
3. Emails to the PPM Administrator will generate a HEAT ticket.
4. All inquiries will be responded to within 48 hours and resolved within 5 business days.

5. If the PPM software application requires unplanned downtime, the PPM community will be notified via email immediately. During downtime, team members are to perform their work manually until it can be documented again in the PPM software application.
6. When the OIT PMO Administrator is out of the office, there will be a back-up contact in place to handle all emergency maintenance.

F. Upgrades

1. The OIT PMO PPM Administrator will alert the PPM community at least one week prior to an update or upgrade occurring.
2. The update or upgrade will be performed by the PPM Vendor during non-business hours.
3. All major upgrades will be tested by the OIT PMO PPM Administrator prior to upgrading to the production environment.
4. PPM team members will be offered training when upgrades to the PPM software create major performance or usage changes.
5. Documentation will be provided to help the PPM community become familiar with any changes.

IV. Exhibits

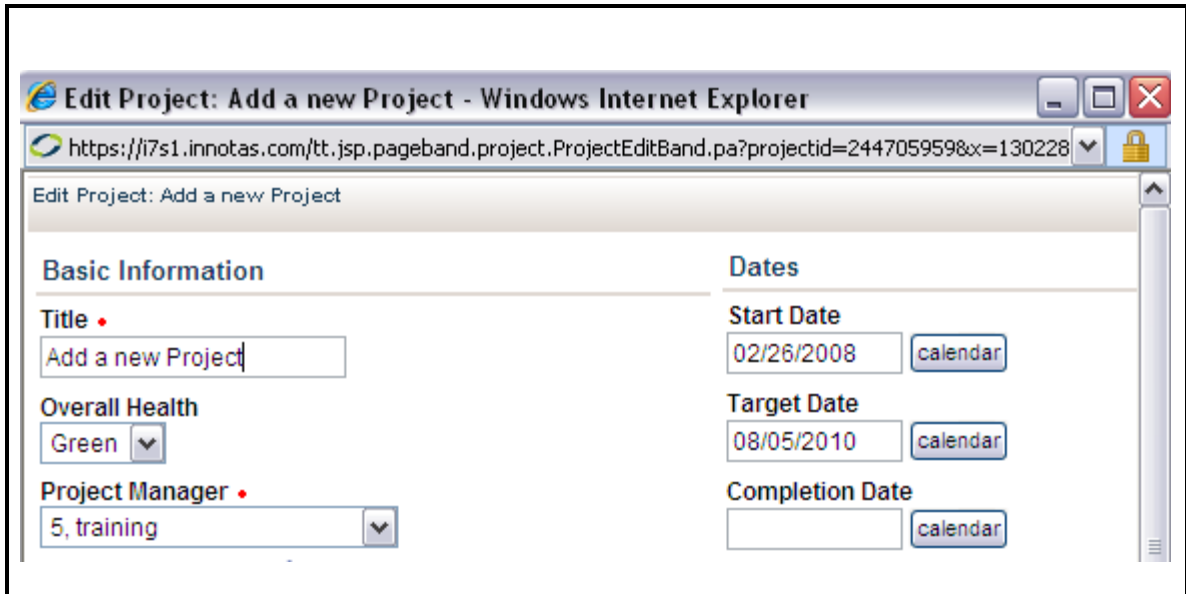
- [Appendix A:](#) INNOTAS Minimum Requirements - Project Managers
[Appendix B:](#) Project Status Update Standards

INNOTAS Minimum Requirements; Project Managers

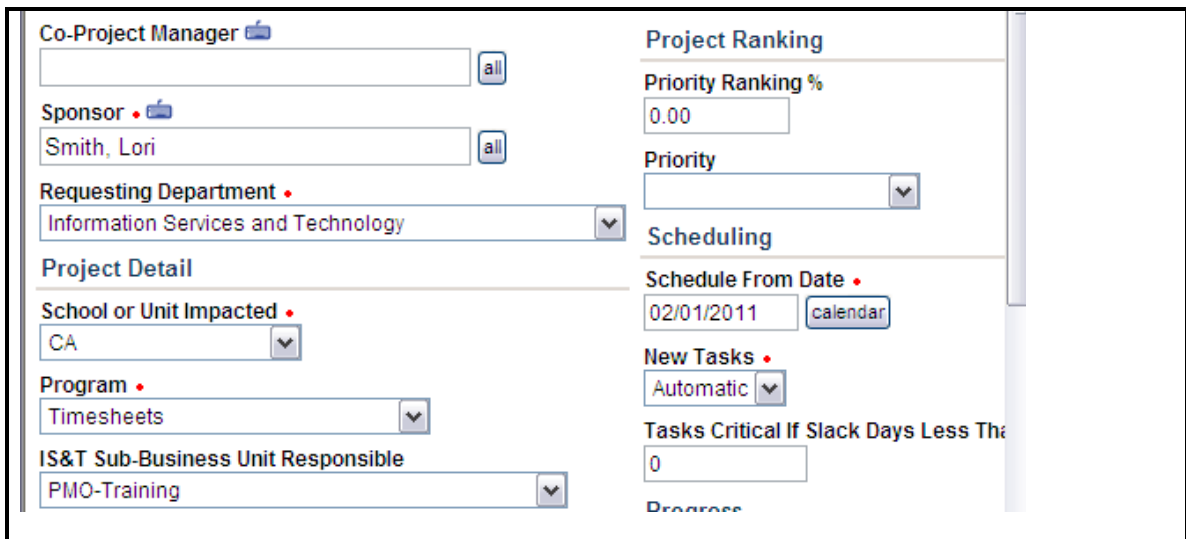
The Project info screen must be filled out in its entirety

Required fields; the “Edit Project:” info screen must be completed to include all of the required fields including the following:

- **Title:** Project title
- **Overall Health:** Overall Project Manager’s perspective on the health of the project
- **Project Manager:** Project manager responsible for the project
- **Start Date:** Official start date of the project
- **Target Date:** Estimated end date



- **Co-Project Manager:** (If applicable)
- **Sponsor:** Individual responsible for the project budget
- **Requesting Department:** Project from which the request was generated
- **School or Unit Impacted:** School or unit that will be impacted by implementation
- **Program:** Program that the project will be filed under
- **New Tasks:** Can be entered automatically or manually



- **Project Size:** Estimated time it will take to complete the project
- **Status:** Identifies if the project is open, closed etc. in the system
- **Project Category:** This category identifies the unit and sub-unit
- **Application:** Application to which the project pertains
- **Phase:** Identifies the phase of the project lifecycle the project is currently in

Project Size • Small 500 Hrs	Progress
Portfolio Classification • Infrastructure	Status • Open
Project Type • Upgrade	Phase
Project Category PMO - Training	Hrs To Comp 0.00
Application	Banner Index Nbr
	<input type="checkbox"/> Financial Impact

Status Updates (Status of the project on the main project info screen must be updated as needed. Also the “Notes” section of the main project info screen must be updated with “Status Comments” as required by the PMO.)

Notes ▲
Status Comments ▲
Status Update - Smith, Lori 02/25/2010 07:31:14 AM Status as of 02.26.10 Phase: Planning Executive Summary: Created the Policy Review Committee. Working on mission statement. Work on OPPM Portfolio policies is moving forward. Progress: Learning the OPPM policy and process. Budget: 0 Risks: none

Task must be entered but only up to the HLA level. Tracking time to the HLAs is optional.
 More detailed tasks may be entered but, at a minimum, the HLAs need to be entered.

The screenshot shows the 'Projects' tab selected in the top navigation bar. Below it, the 'Tasks (26)' sub-tab is active. The main content area is titled 'Tasks: Data Center Source Funding'. It displays a table with the following columns: a checkbox, 'H #', 'Outline', 'Title', and 'Owner'. The table contains three rows of task data.

<input type="checkbox"/>	H #	Outline	Title	Owner
<input checked="" type="checkbox"/>			Data Center Source Funding	Innotas, Administrator
<input type="checkbox"/>	26	2	Analysis Closure Activities	
<input type="checkbox"/>	1	1	Data Center Sourcing Analysis	

Issue tracking: All Issues must be entered into the system in place of Issue Log.

The screenshot shows the 'Issues (3)' sub-tab active. The main content area is titled 'Issues: Data Center Source Funding [Dynamic View]'. It displays a table with the following columns: a checkbox, 'Title', 'ID', and 'A'. The table contains three rows of issue data.

<input type="checkbox"/>	Title	ID	A
<input type="checkbox"/>	CO-based Solution: Finalize Prelim Costs	298408375	W
<input type="checkbox"/>	IT Outsourcing Solution: Finalize Prelim Costs	298410630	W
<input type="checkbox"/>	Data Center Funding Final Report Review	358910258	G

Attachments All project information should be attached and archived in the attachments area on the project info screen.

Detailed project schedule must be attached and updated as needed It is required that a detailed project schedule be built either in MS project or within INNOTAS or a comparable program.

Appendix B Project Status Update Standards

Standardized status updates for projects within Innotas to be used by Project Managers.

After reviewing a number of project status updates completed by various Project Managers, the following was created and is the status update standard to use.

Status:

Status as of MM.DD.YY (must be reported in this format).

Phase:

Initiation, planning, etc., and percent complete (This is the % complete for the current phase.)

Priority:

High, Medium, Low.

Executive Summary:

The detail in this section should be at a level sufficient for a quick review allowing upper management to get an idea of the project status. In general, this would be a summarization of the Progress/accomplishments section. If the project health is 'red' or 'yellow', the info in this section should explain why.

Progress/Accomplishments:

The amount of detail and format in this section may vary depending on the project. Generally, there should be a narrative summarization of the progress made on the project since the last status update, followed by a numbered or bulleted list of topics/items that are relevant to the project. The progress/accomplishments may be split up into sections that are aligned with the project phase (i.e., Planning Phase could have a section for WBS, Risk Management Plan, Schedule Development, etc; Execution Phase could have milestones from the schedule, etc.), or aligned to high level categories such as Scope, Schedule or Resources.

Budget:

Project budget information may vary depending on the size and visibility of the project. Typically, this would include the project budget and status (approved, pending approval). Budget changes, variances, purchasing updates/status, or other budget related information should be included, if applicable. ["Not applicable at this time," "No change in status at this time" should be written if there is nothing to report in this section.]

Risks:

This should include any high impact, or recently identified risks, including risks that may occur in the near future (i.e., next two weeks/period). Not every risk needs to be included here, as that is what the Risk Register is for. "Not applicable at this time" or "No change in status at this time" should be noted if there is nothing to report in this section.

Next Steps:

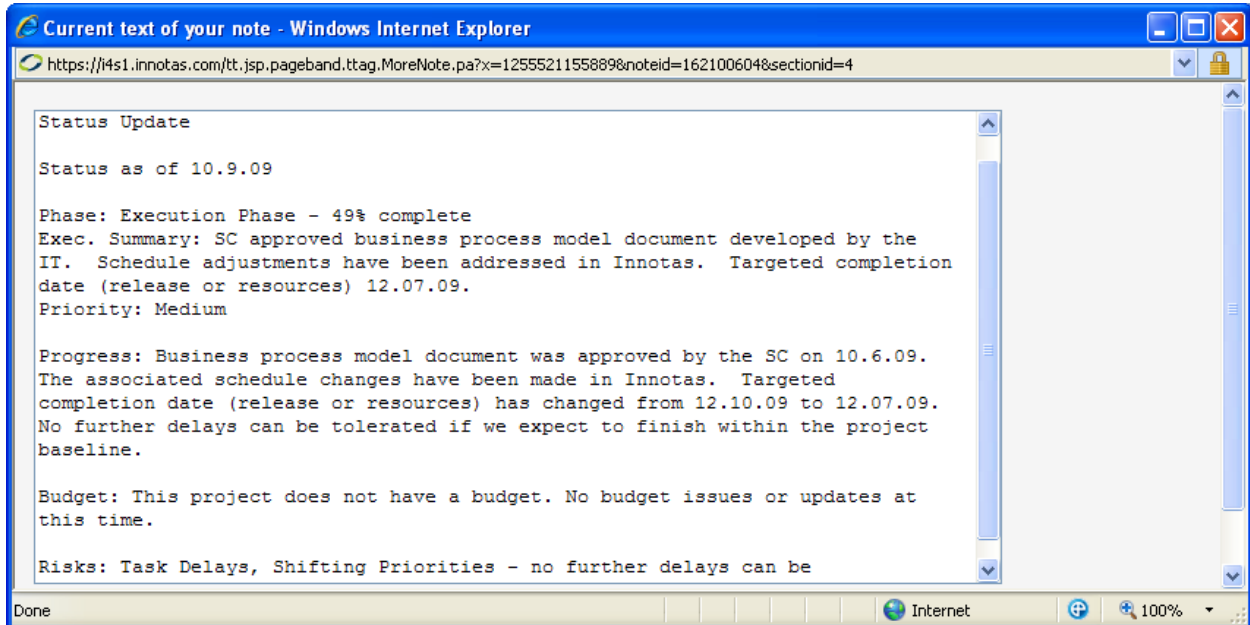
This should be a numbered or bulleted list of immediate next steps such as upcoming meetings, deliverables or action items for the project team. If applicable, the person/group assigned to a step should be indicated, along with due dates.

Constraints & Assumptions:

When appropriate, list any new/changed constraints and assumptions on the project identified since the last status update. "Not applicable at this time" or "No change in status at this time" should be noted if there is nothing to report in this section.

The items above should be the minimum sections included in a status update. Include additional categories, such as Audit, if they are pertinent to a project. However, if there is no change in status, or if something is not applicable, then it must be stated as such. Status update sections should not be left blank.

Sample Status Update:



Status Update

Status as of 10.9.09

Phase: Execution Phase - 49% complete

Priority: Medium

Executive Summary: SC approved business process model document developed by the IT. Schedule adjustments have been addressed in Innotas. Targeted completion date 12.07.09.

Progress: Business process model document was approved by the SC on 10.6.09. The associated schedule changes have been made in Innotas. Targeted completion date (release or resources) has changed from 12.10.09 to 12.07.09.

No further delays can be tolerated if we expect to finish within the project baseline.

Budget: This project does not have a budget. No budget issues or updates at this time.

Risks: Task Delays, Shifting Priorities - no further delays can be accommodated if the project is to finish within the expected completion date.