UF UNIVERSITY of FLORIDA
Information Technology

PROJECT MANAGEMENT AND TIME REPORTING

PMI Registered Education Provider
Project Management Institute

STRPMG-1840

Revised 05/14

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UFIT Project Management and Time Reporting

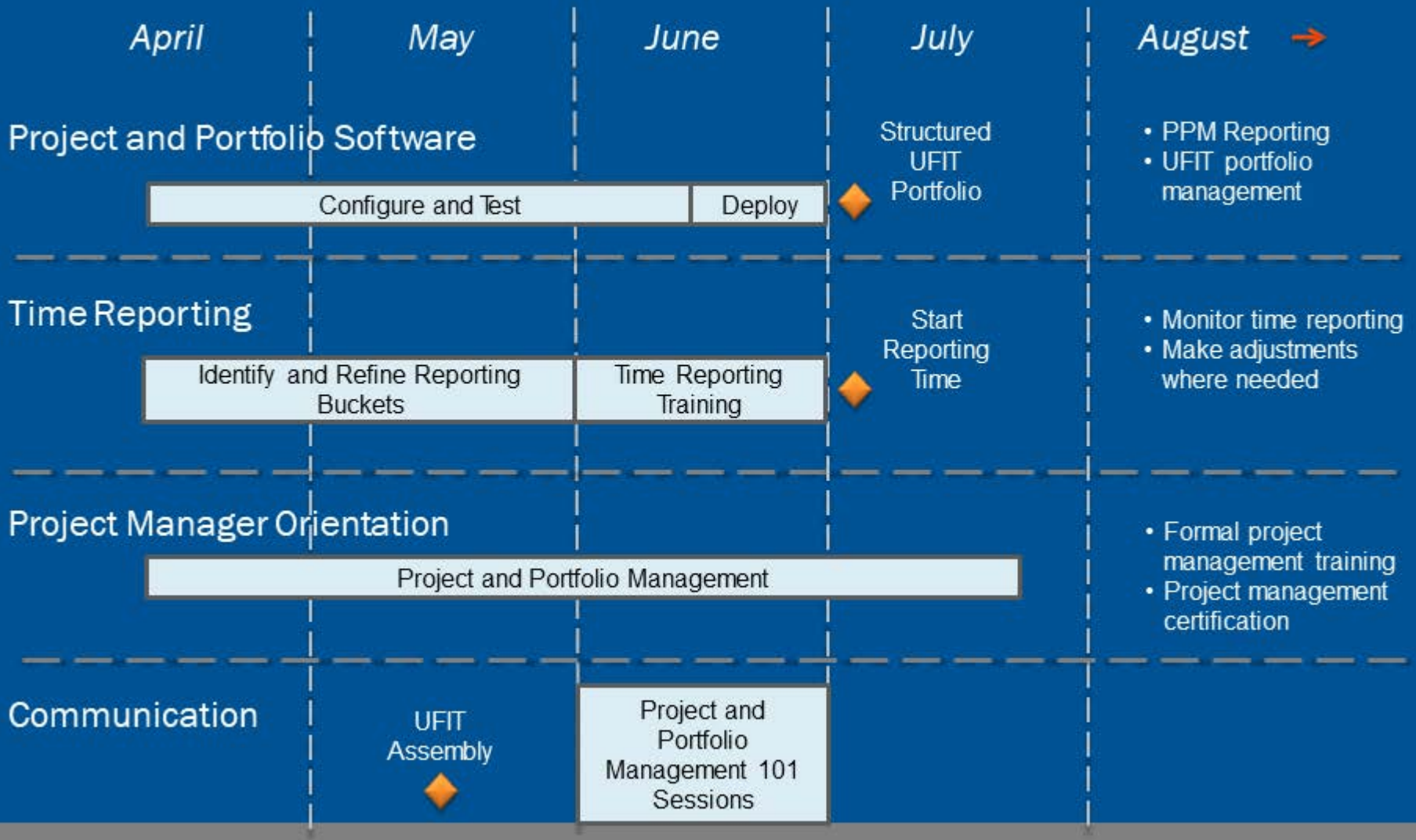
Objectives

- Give staff a mechanism to document their workload
- Develop a UFIT project portfolio structure
- Deploy project management methodology across UFIT
- Grow project management competency throughout UFIT
- Improve demand management
- Establish certified project managers in all UFIT units

Outcomes

- Reduced over- and under-allocation of staff
- A manageable project portfolio for UFIT
- More on-time and on-budget projects
- Better communication and collaboration with customers and UFIT
- Data-driven budgeting decision making and priority setting
- Cost transparency

Timeline



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Organizational Representatives

Unit	Role	Name
Research Computing	Project and Portfolio Representative	Jon Akers
	Project Manager	Jon Akers
	ER Representative	Jon Akers
	Project Manager	Erick Deumens
Enterprise Infrastructure & Operations	Project and Portfolio Representative	Todd Williams
	Project Manager	Todd Williams
	ER Representative	Todd Williams
Information Security	Project and Portfolio Representative	David Huelsman
	Project Manager	David Huelsman
	ER Representative	Rob Adams
Networking Services	Project and Portfolio Representative	Sheridan Rudolph
	Project Manager	Dan Miller
	Project Manager	John Madey
	ER Representative	Sheridan Rudolph
	Project Manager	Sheard Goodwin
Customer Technology Services	Project and Portfolio Representative	David Gagne
	Project Manager	David Gagne
	Project Manager	Vanda Merriman
	ER Representative	Elwood Aust
Academic Technology	Project and Portfolio Representative	Anne Allen
	Project Manager	Anne Allen
	ER Representative	Anne Allen

Course Objectives

- Link project management to organizational strategy
- Establish roles and responsibilities
- Present a methodology for achieving project success
- Reinforce importance of time reporting to UFIT's success

What Will We Cover?

- Overview
- Initiating Projects
- Planning Projects
- Managing Projects
- Closing Projects
- Portfolio Management

What is a Project?

UFIT also uses additional criteria to help establish a project by assessing the associated work effort in resource hours. Should a set of tasks take more than 80 hours of work effort, then this establishes the tasks as a project.

Projects

- Temporary
- Unique
- Attains objective

Operations

- On-going
- Repetitive
- Sustains business

Discussion

- What are the attributes of a successful project?
- How do you know if a project is successful?
- What are the most significant factors that contribute to success?

What Drives Success?

- All agree on project goals
- Clear responsibilities
- Effective communication
- Controlled scope
- Management support
- Consistent methodology

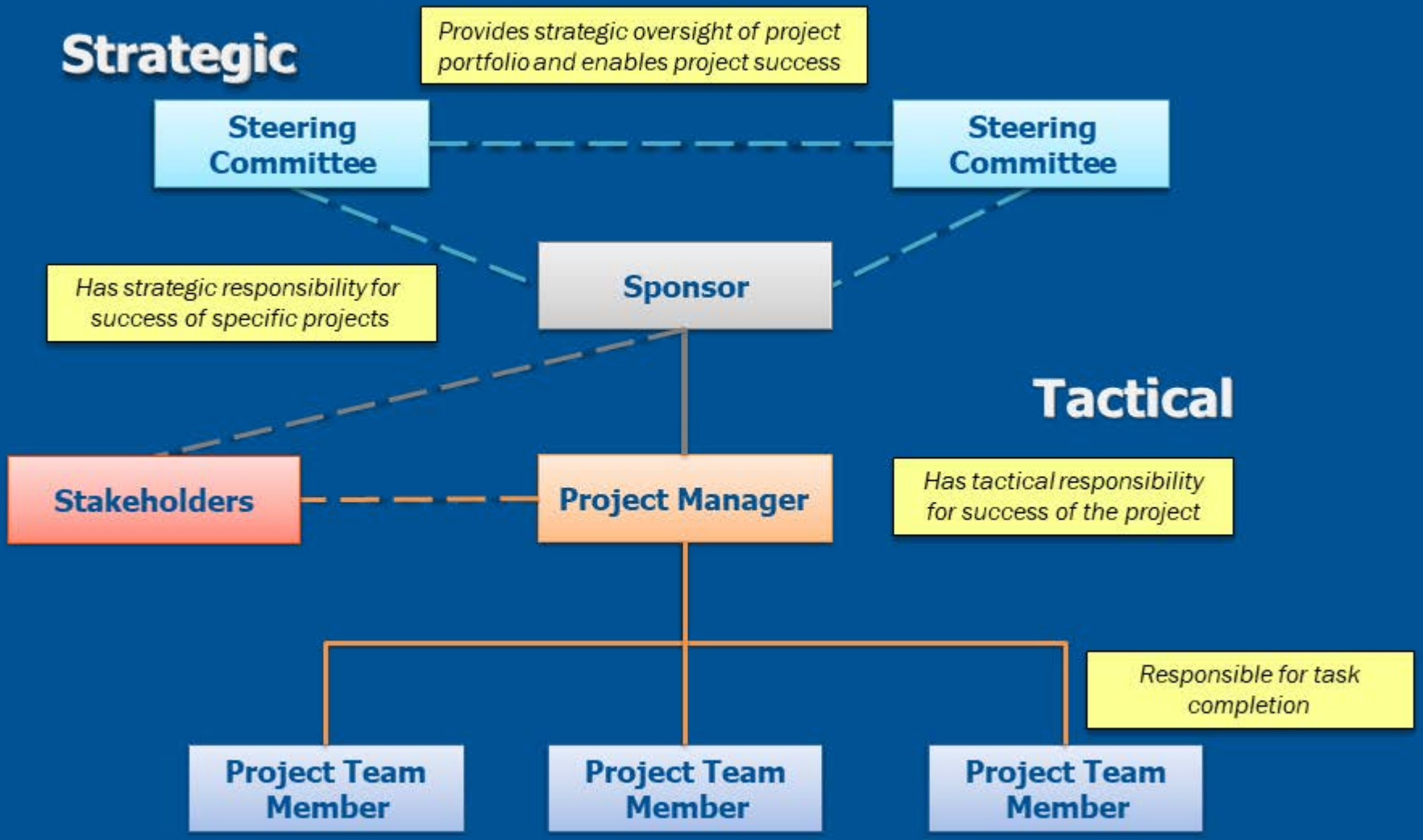
- Consistent deployment of strategic initiatives
- Familiarity with similar terminology
- Better definition of expectations
- Ease of managing multiple projects
- Ability to leverage previous work

Art or Science?

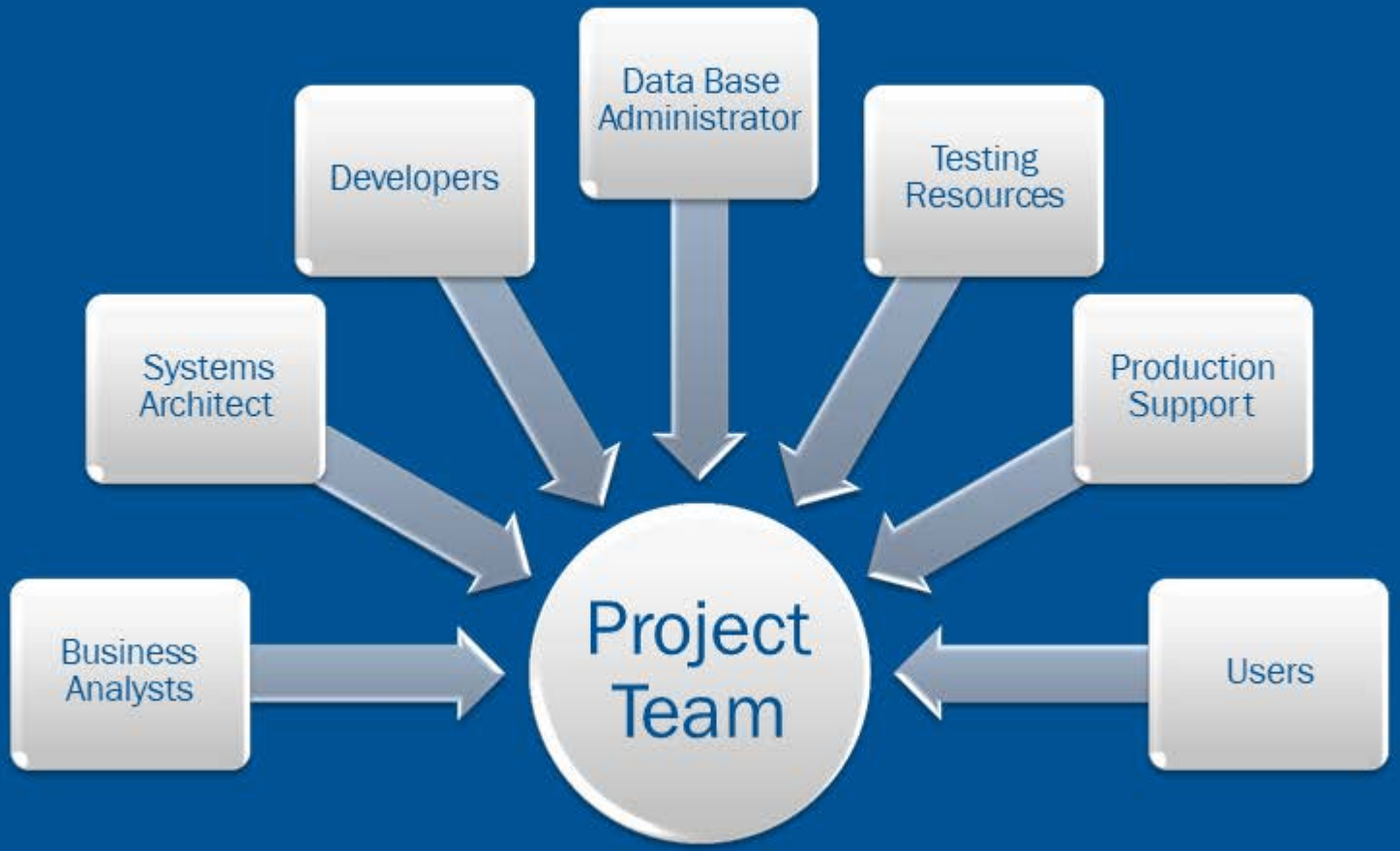
Triple Constraint Theory

- From the organization's perspective
  - With minimal or mutually agreed upon scope changes
  - Without disturbing the organization's corporate culture or values
  - Without disturbing the organization's usual work flow

Roles and Responsibilities

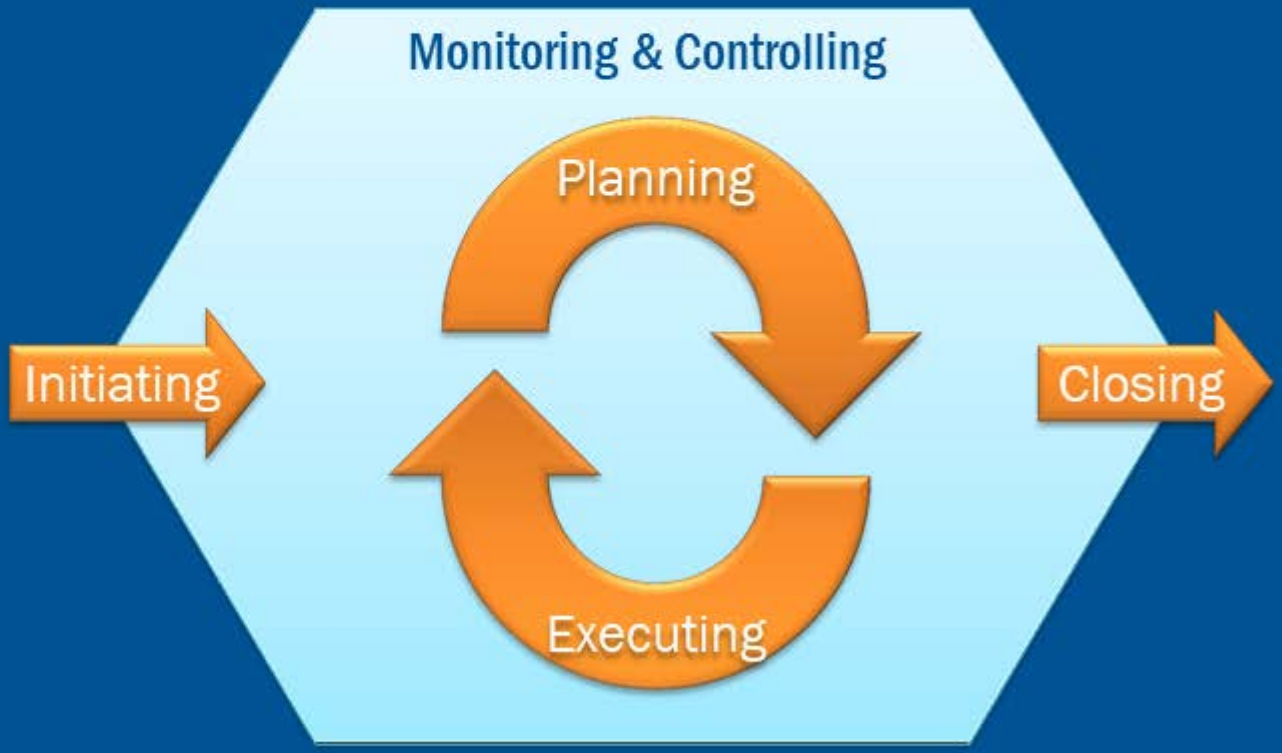


Other Possible Team Members



The Initiate, Plan, Execute, and Close (IPEC) methodology is designed to meet the needs of all UFIT and our customers as we engage in project work.

Process Groups



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Life Cycle

Understand what to build	Understand how to build it	Build it	Evaluate and adjust	Validate solution
• Vision • Business case • Project selection • Define stakeholders • High level requirements • Communicate	• Scope definition • Detailed requirements • Requirements management plan • Baseline architecture • Project tasks and timelines • Communication, Quality, and Risk plans	• Task execution • Detailed design • Development • Component acquisition • Manage team • Manage risks • Communicate	• Testing • Change control • Monitor progress and report status • Quality assurance • Manage risks • Communicate	• Testing • Client sign-off • Lessons learned • Transition to operations • Administrative closure • Communicate

PMI: Succeed or Fail?

- For projects that failed, where was the origin of the failure?
- For projects that succeeded, what amount of time was allocated to each phase?

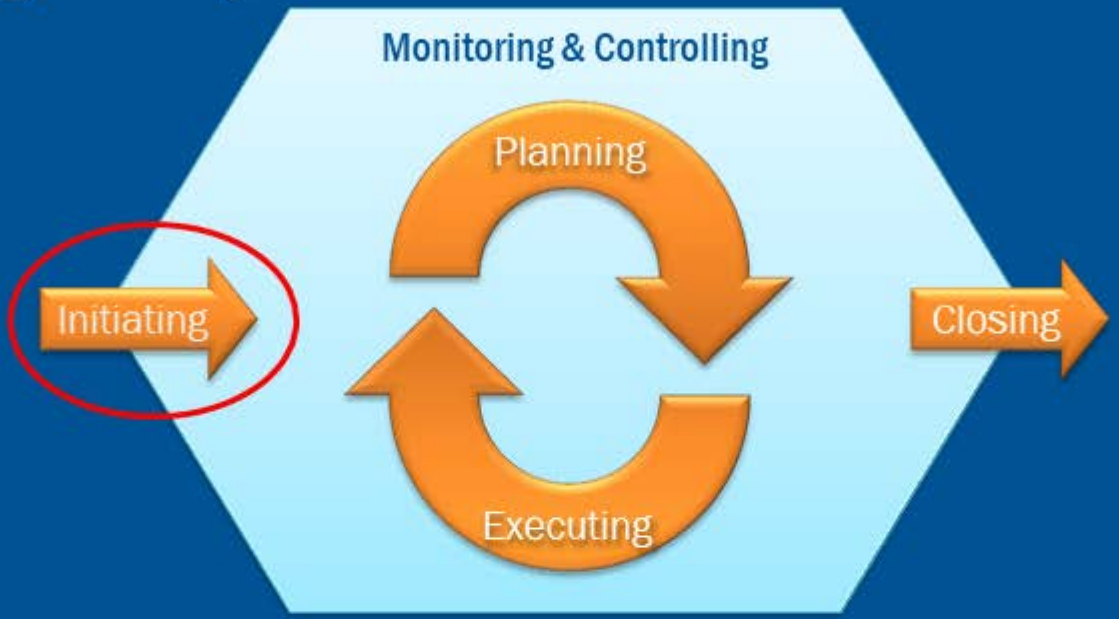
Failure Point	Process Group	Time for Success
90%	Initiate	10%
	Plan	15%
	Execute	60%
	Monitor & Control	
	Close	15%

"A review of most failed project problems indicates that the disasters were well-planned to happen from the start. The seeds of problems are laid down early. Initial planning is the most vital part of a project."

From: *One Hundred Rules for NASA Project Managers* NASA Rule #15

Initiating a Project

- Proposal
- Business Case
- Project Charter



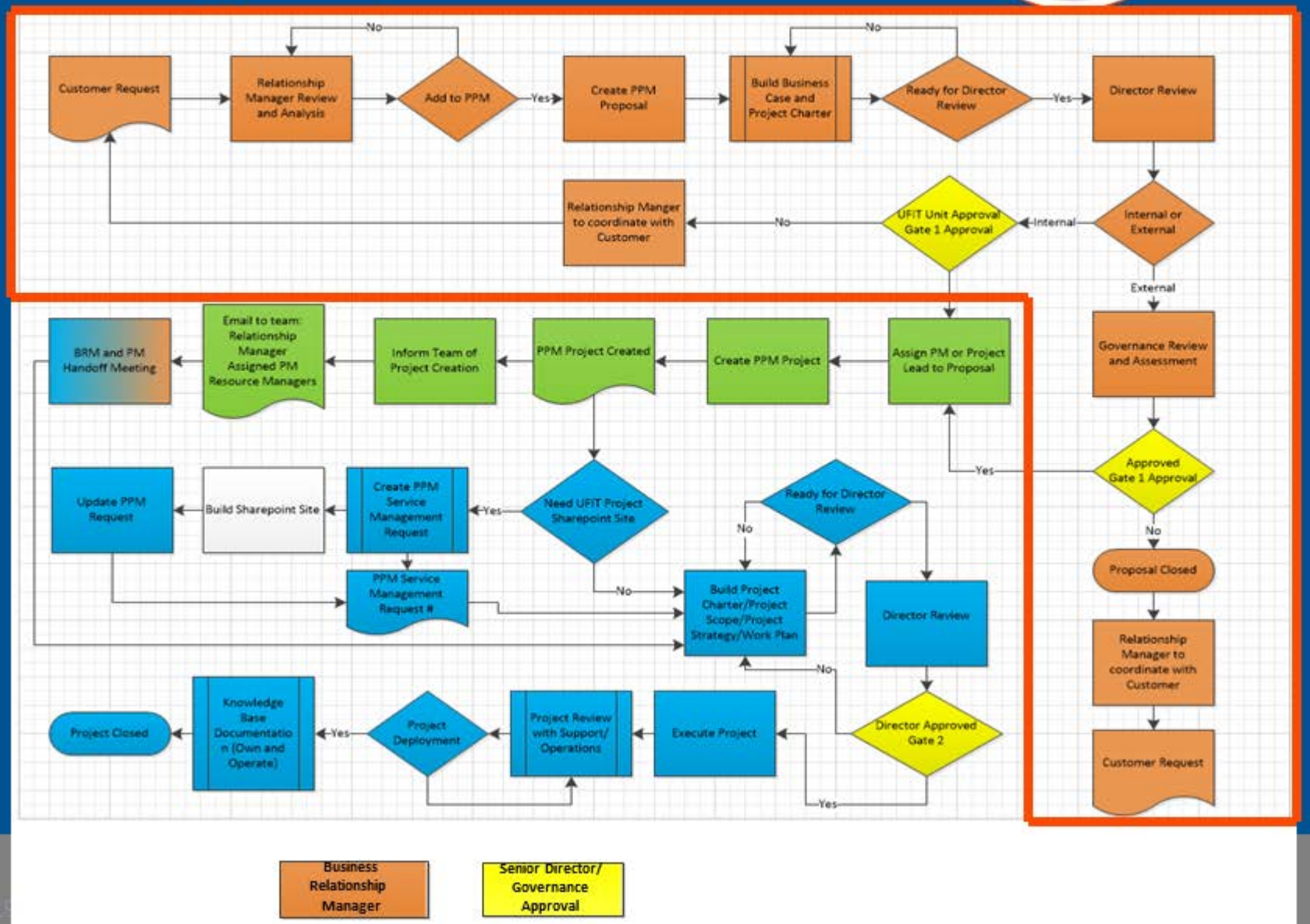
Activities	Tools
• Project Selection • Project Authorization	• Project Charter • Stakeholder Analysis

Project Selection

Project Classes

- Core
- Efficiency
- Growth
- Innovation

Initiating a Project



UFIT Project Charter

1. Business Needs Impact
    1. Project Goals
    2. Project Sponsors
2. Business Organizations Impacted
3. Assumptions
4. Constraints
5. Scheduled Project Lifecycle Milestones
6. Effort Projection by Resource Type
7. Project Deliverables
8. Project Organization
9. Authorization Information

Charter Example

1.0 Business Needs Impact
2.0 Business Organizations Impacted

Project Name	69248-ITSM Project Scoping		
Charter Author		Request Date	03/13/2013

The University of Florida (UF) has initiated an effort to improve and formalize its IT Service Management (ITSM) capabilities, design new processes, and select appropriate tools. UF Project management wishes to ensure that tool selection and detailed implementation activities are based on a solid foundational understanding of the service management processes to be implemented, and the functional requirements resulting from those future-state process designs. UF is seeking an experienced, independent advisor to assess its current ITSM efforts, drive the design of future-state processes, identify the related functional requirements for appropriate tools, and help UF reach the point where it is ready to pursue tool selection efforts.

Definition of Success:

- Improve UFIT management capabilities
- Improve efficiency
- Improve customer satisfaction
- Develop and improve metrics
- Achieve a unified service level agreement for UFIT
- Define UFIT Benchmark metrics

Business Organizations Impacted:

- All of UFIT will be engaged as well as providing input into the overall UFIT ITSM space.

Project Sponsors	Elias Eldayrie

Roles and Responsibilities

R: Does the step
A: Accountable for the step
C: Consulted with before
I: Informed when completed

Initiating

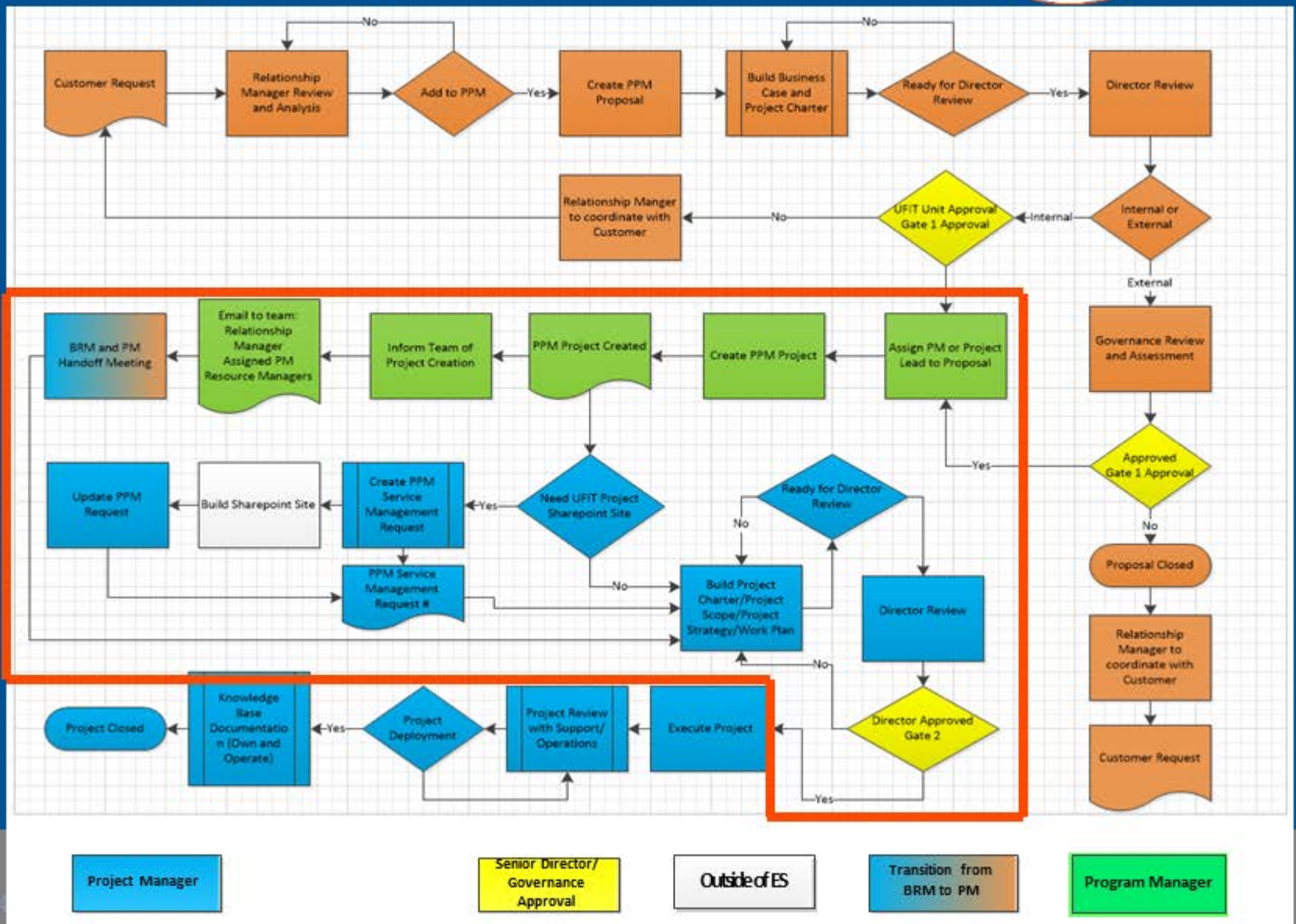
Activity	Project Manager	Architect	Project Team	Sponsors	Stakeholder
Project Charter	R	C	C	A	A
Staffing Profile for Planning	A/R		C		
Architecture	I	A	C		
Gate 1 approval	A/R			I	I

Project Planning

- Project Scope
- Refined Requirements
- Staffing Profile
- Project Strategy
- Work Plan

Activities	Tools
• Define scope • Create Work Breakdown Structure • Identify tasks and interdependencies • Estimate activity duration and resources • Finalize and distribute project plan	• Statement of Work • Work Breakdown Structure • Estimating Techniques • Network Diagram • Critical Path • Resource Spreadsheet

Planning a Project



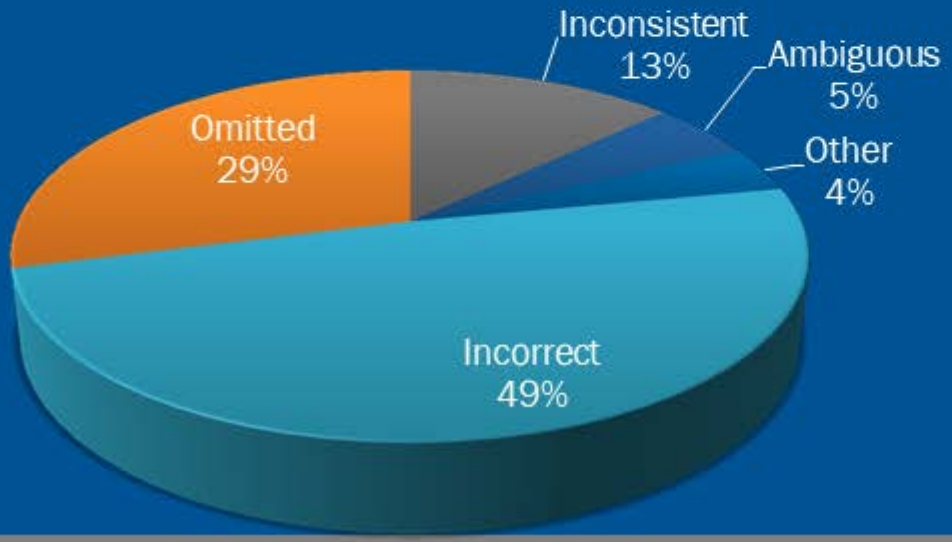
Requirements

- "Poorly defined applications have led to a persistent miscommunication that largely contributes to a 66% PROJECT FAILURE RATE , costing US businesses at least $30 BILLION every year."

Forrester Research

- "It is estimated that 85 % of the defects developed in software originate in the requirements. ..."

"Recommended Requirements Gathering Practices"
Cross Talk – The Journal of Defense Software Engineering
Dr. Ralph R. Young



Requirements Errors

UFIT Project Charter

1. Business Needs Impact
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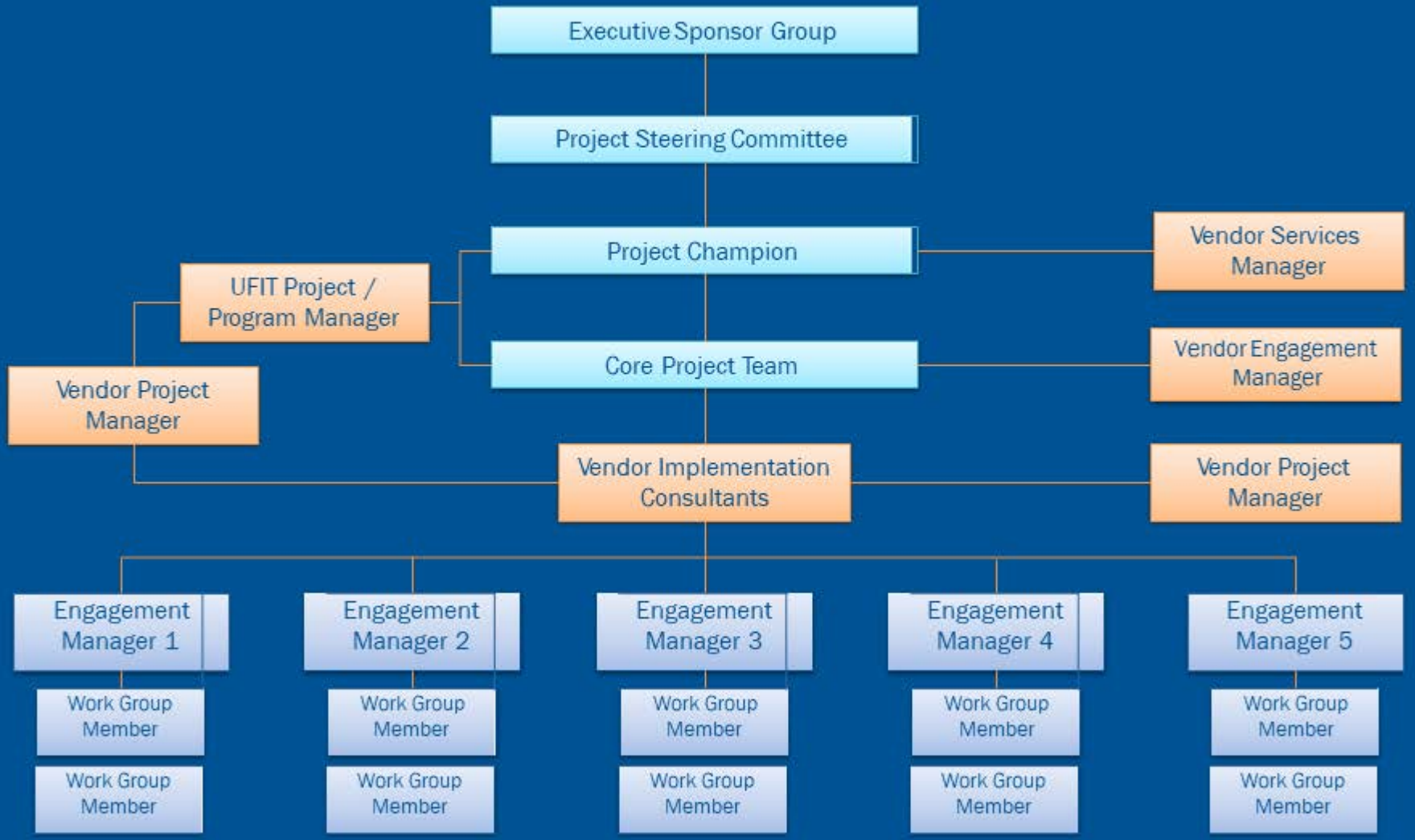
Project Organization



Work Breakdown Structure Task Plan

Proc Impr Task Plan

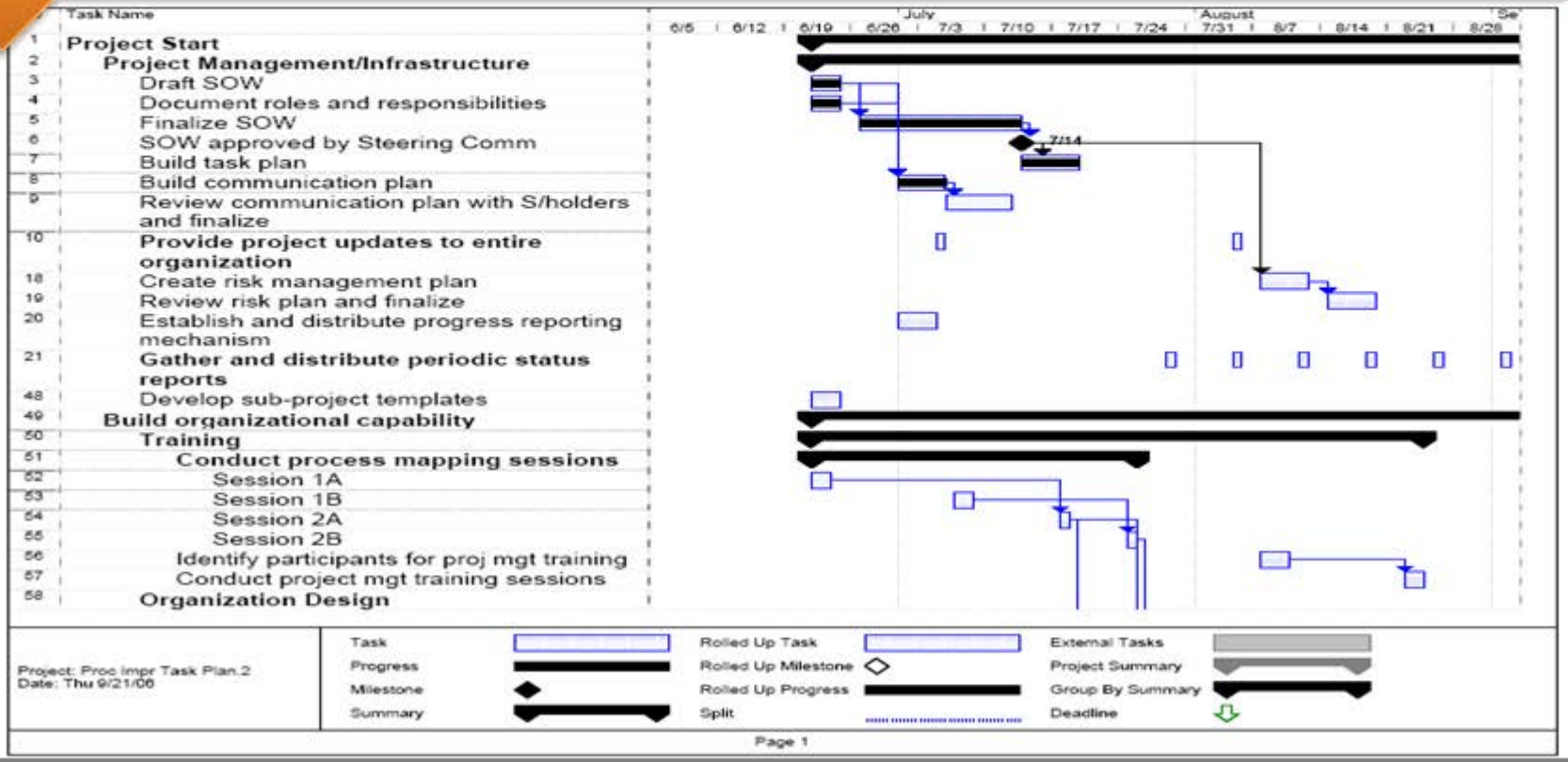
ID	Task Name	Duration	Start	Finish	Predecessors
1	**Project Start**	**161 days**	**Wed 6/22/05**	**Wed 2/1/06**	
2	**Project Management/Infrastructure**	**153 days**	**Wed 6/22/05**	**Fri 1/20/06**	
3	Draft SOW	3 days	Wed 6/22/05	Fri 6/24/05	
4	Document roles and responsibilities	3 days	Wed 6/22/05	Fri 6/24/05	
5	Finalize SOW	10 days	Mon 6/27/05	Fri 7/8/05	3
6	SOW approved by Steering Comm	0 days	Fri 7/8/05	Fri 7/8/05	5
7	Build task plan	5 days	Mon 7/11/05	Fri 7/15/05	6
8	Build communication plan	3 days	Fri 7/1/05	Tue 7/5/05	3,4
9	Review communication plan with S/holders and finaliz	5 days	Wed 7/6/05	Tue 7/12/05	8
10	**Provide project updates to entire organization**	**133 days**	**Tue 7/5/05**	**Thu 1/5/06**	
18	Create risk management plan	5 days	Mon 8/8/05	Fri 8/12/05	6
19	Review risk plan and finalize	5 days	Mon 8/15/05	Fri 8/19/05	18
20	Establish and distribute progress reporting mechanisr	2 days	Fri 7/1/05	Mon 7/4/05	
21	**Gather and distribute periodic status reports**	**126 days**	**Fri 7/29/05**	**Fri 1/20/06**	
48	Develop sub-project templates	3 days	Wed 6/22/05	Fri 6/24/05	
49	**Build organizational capability**	**161 days**	**Wed 6/22/05**	**Wed 2/1/06**	
50	**Training**	**46 days**	**Wed 6/22/05**	**Wed 8/24/05**	
51	**Conduct process mapping sessions**	**24 days**	**Wed 6/22/05**	**Mon 7/25/05**	
52	Session 1A	2 days	Wed 6/22/05	Thu 6/23/05	
53	Session 1B	2 days	Thu 7/7/05	Fri 7/8/05	
54	Session 2A	1 day	Mon 7/18/05	Mon 7/18/05	52
55	Session 2B	1 day	Mon 7/25/05	Mon 7/25/05	53
56	Identify participants for proj mgt training	3 days	Mon 8/8/05	Wed 8/10/05	
57	Conduct project mgt training sessions	2 days	Tue 8/23/05	Wed 8/24/05	56
58	**Organization Design**	**91 days**	**Wed 9/28/05**	**Wed 2/1/06**	
59	**Design new organization chart**	**21 days**	**Wed 9/28/05**	**Wed 10/26/05**	
60	Draft org chart	3 days	Wed 9/28/05	Fri 9/30/05	83
61	Present Org Chart draft to Steering Commit	5 days	Mon 10/3/05	Fri 10/7/05	60
62	Present to Executive Committee	5 days	Mon 10/10/05	Fri 10/14/05	61
63	Refine and finalize org chart	3 days	Mon 10/17/05	Wed 10/19/05	62
64	Org chart approved	0 days	Wed 10/19/05	Wed 10/19/05	63
65	Communicate new org structure to staff	5 days	Thu 10/20/05	Wed 10/26/05	64

WBS

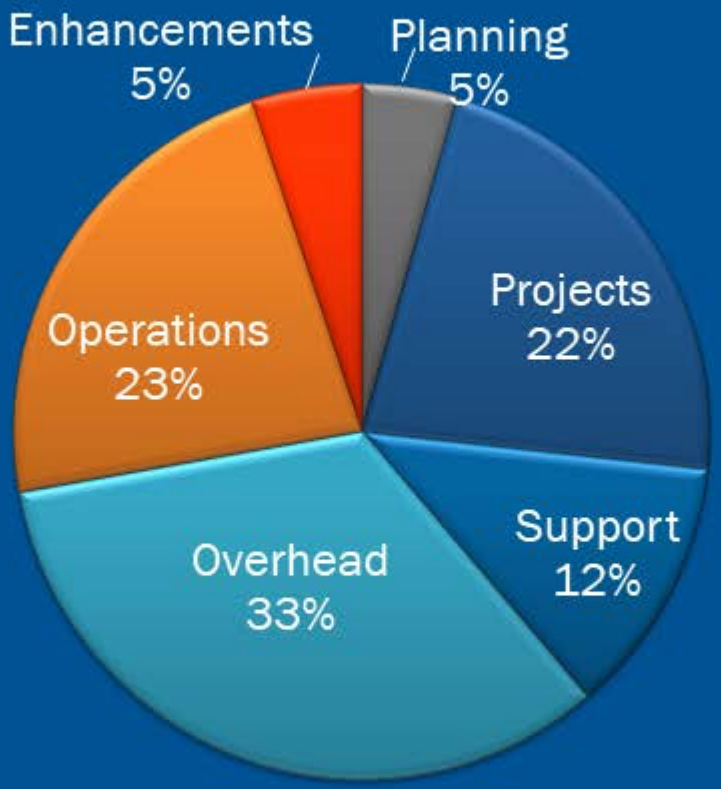
	WBS	Task Name	% Comp	Work	Duration	Start	Finish	Predecessors	Re
1	1	69248-ITSM Project Scoping (Initiate and Plan)	28%	362.55 hrs	709 hrs?	Fri 2/1/13	Wed 6/5/13		
2	1.1	Planning Phase	62%	80.55 hrs	369 hrs?	Fri 2/1/13	Mon 4/8/13		
38	1.2	Project Initiation	0%	0 hrs	40 hrs	Mon 4/8/13	Fri 4/12/13		
43	1.3	Confirm Goals and Priorities	0%	30 hrs	84 hrs	Mon 4/8/13	Mon 4/22/13		
48	1.4	Develop ITSM Tools Strategy	0%	24 hrs	24 hrs	Mon 4/22/13	Thu 4/25/13		
51	1.5	Identify ITSM Process Requirements for Tool Evaluation	0%	48 hrs	64 hrs	Thu 4/25/13	Tue 5/7/13	50	
55	1.6	ITSM Tool Selection Readiness and Initiation	0%	48 hrs	168 hrs	Tue 5/7/13	Wed 6/5/13		
59	1.7	Build Project Strategy	4%	132 hrs	337.6 hrs	Tue 3/19/13	Thu 5/16/13		

Gantt Chart

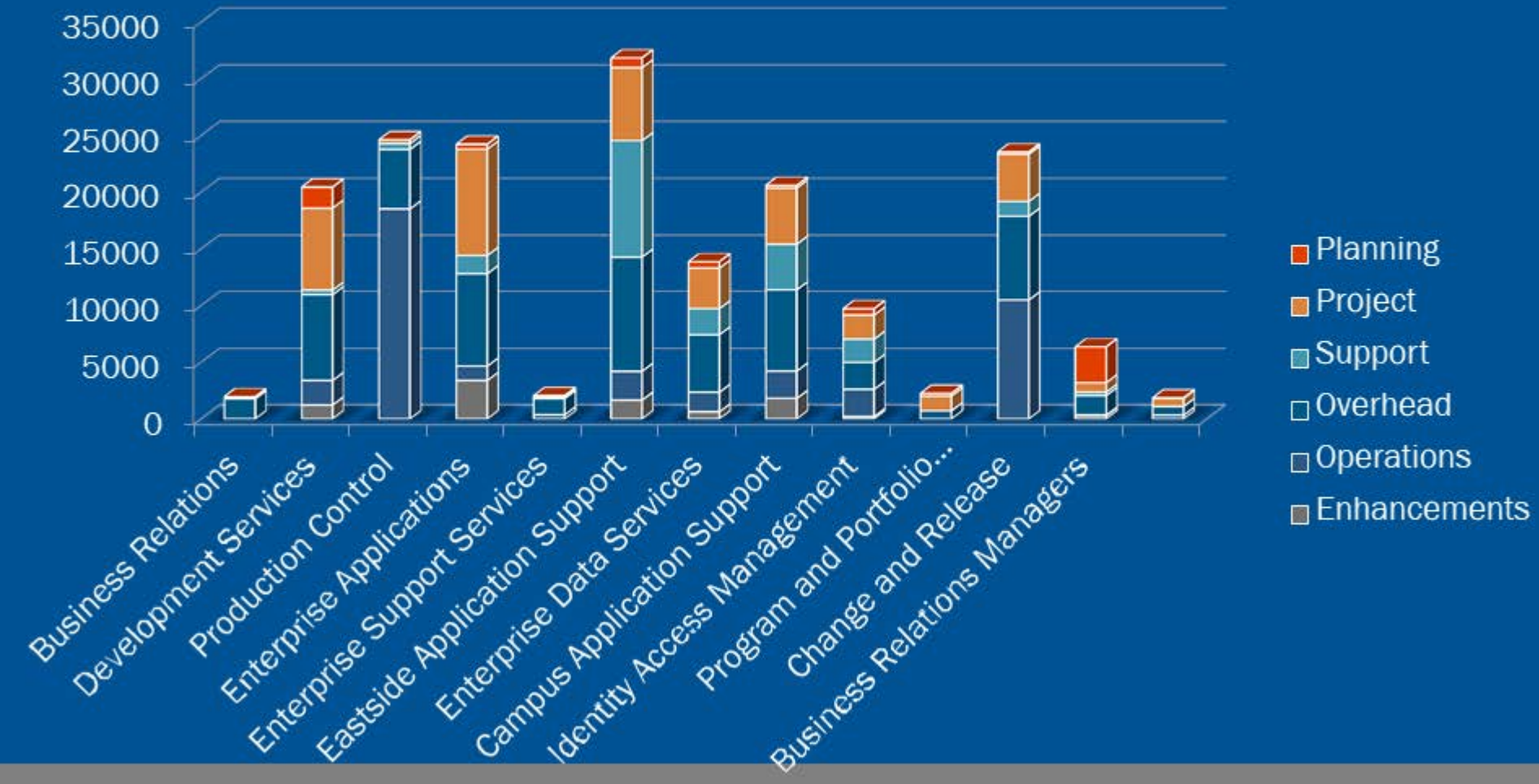
- Time Line
- Task Dependencies



ES Time Allocation – Fiscal Year 2013



Team Information



Project Management Plan

Subsidiary Management Plans

- Communications Management
- Cost Management
- Human Resource Management
- Procurement Management
- Quality Management
- Requirements Management
- Risk Management
- Schedule Management
- Scope Management
- Stakeholder Management

Additional Information

- Cost baseline
- Schedule baseline
- Scope baseline
- Process improvements
- Configuration Management Plan
- Change Management Plan
- Baseline integrity maintenance
- Key management reviews
- Tools and techniques

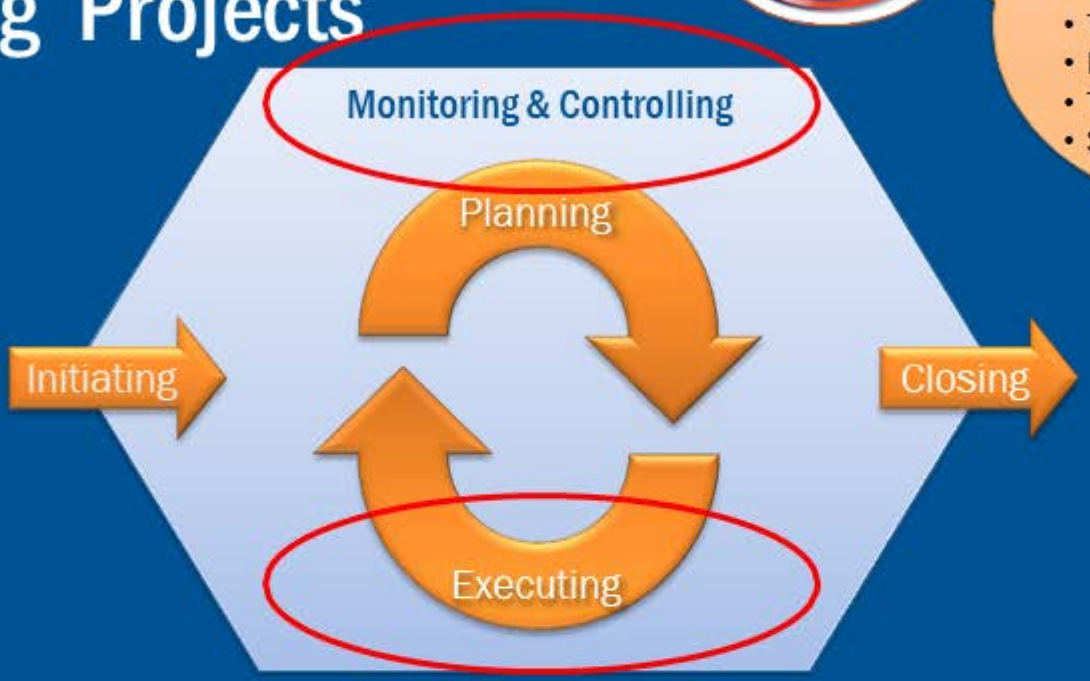
Roles and Responsibilities

R: Does the step
A: Accountable for the step
C: Consulted with before
I: Informed when completed

Planning

Activity	Project Manager	Architect	Business Analyst	Developer	Testing Analyst	Database Admin.
PM Handoff Meeting	A/R				I	
Refine Project Charter	A/R	C	C	C	C	I
Build Project Plan	A/R		A/R	A/R	A/R	A/R
Planning Staffing Profile	A/R		C	C	A/R	C
Execute Staffing Profile	A/R		A/R	A/R	A/R	A/R
Project Strategy	A/R	C	A/R	A/R	A/R	A/R
Project Scope	A/R	C	C	C	C	C

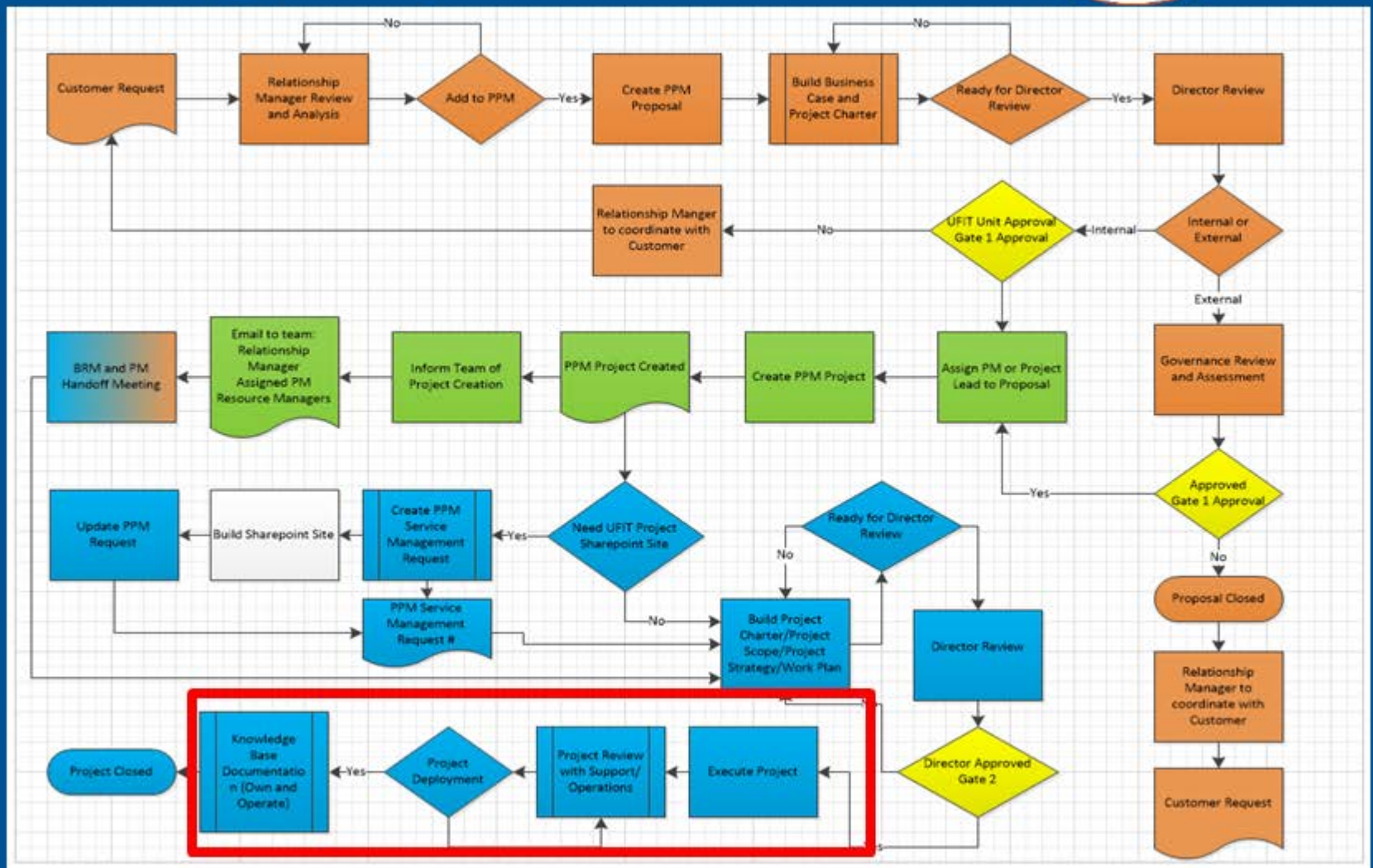
Managing Projects



- Project Artifacts
- Status Reports
- Issue Management
- Testing Strategy
- Deployment Plan
- Training Plan
- Stakeholder Signoff

Activities	Tools
• Direct, manage, monitor and control project work • Manage and control stakeholder engagement	• Status Reports • Change Management

Executing a Project



Monitor and Control Tasks

Slippage in critical path tasks

Other tasks

- Behind schedule
- Completed, but deliverable not met
- Ahead of schedule

Meet scheduled targets

- When was the task started?
- How much is completed?
- What work is left to be done?
- What's needed to get it done?
- What problems might arise?
- How does this impact other tasks?

Reviews

Budget

- Current and/or forecasted variance
- Reasons for variance
- Expenditure timing

Risk

- Monitor planned risks
- Identify new risks
- Execute risk plans and evaluate plan effectiveness

Strategy

- Validate with strategic plan
- Use formal change management process

Quality

- Monitor results for compliance with quality
- Feeds change and management plans

Roles and Responsibilities

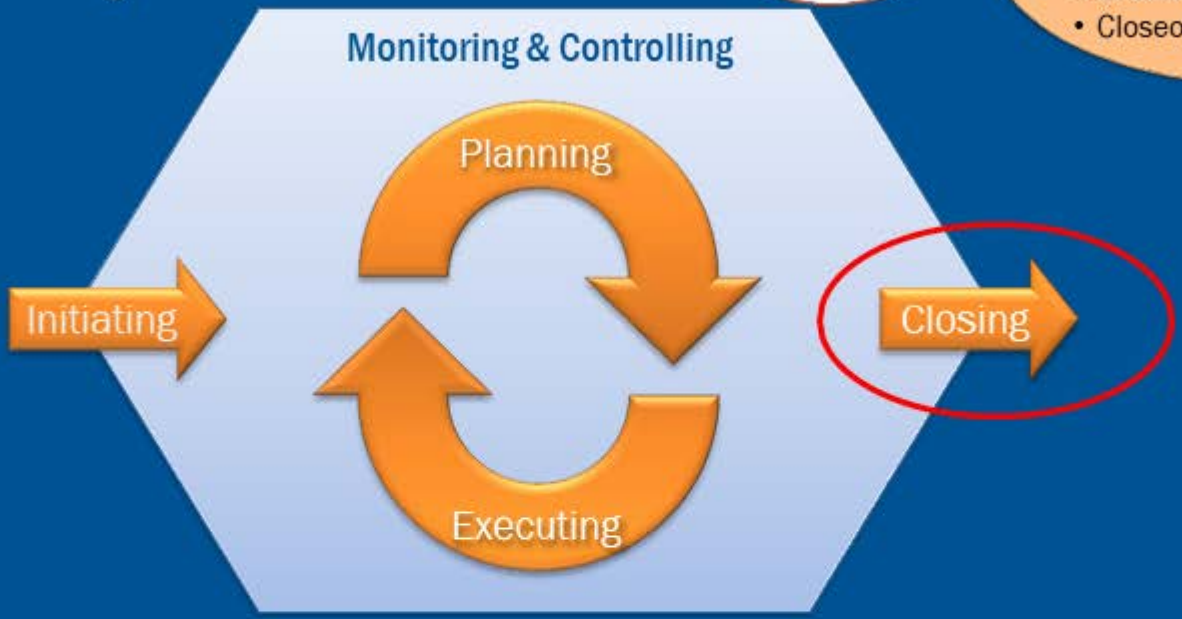
R: Does the step
A: Accountable for the step
C: Consulted with before
I: Informed when completed

Executing

Activity	Project Manager	Business Analyst	Developer	Testing Analyst	Database Admin.	User
Build Project Artifacts	A	A/R	A/R	A/R	A/R	I
Requirements	A	A/R	C/I	A	C	C
Design	A	C/I	A/R	I	A	I
Build	A	C/I	A/R	I	R	I
Build Own and Operate documents	A/R	R	R	I	R	I
Testing Strategy	A	A/R	C	A/R	I	C
Status reporting	A/R	C	C	C	C	C
Training Plan	A	A/R	C	C	I	R
Risk Management	A/R	C	C	C	C	C
Project Scope Sign Off	A/R	C	C	I	C	A
Monitor and Control	A/R	C	C	I	I	I

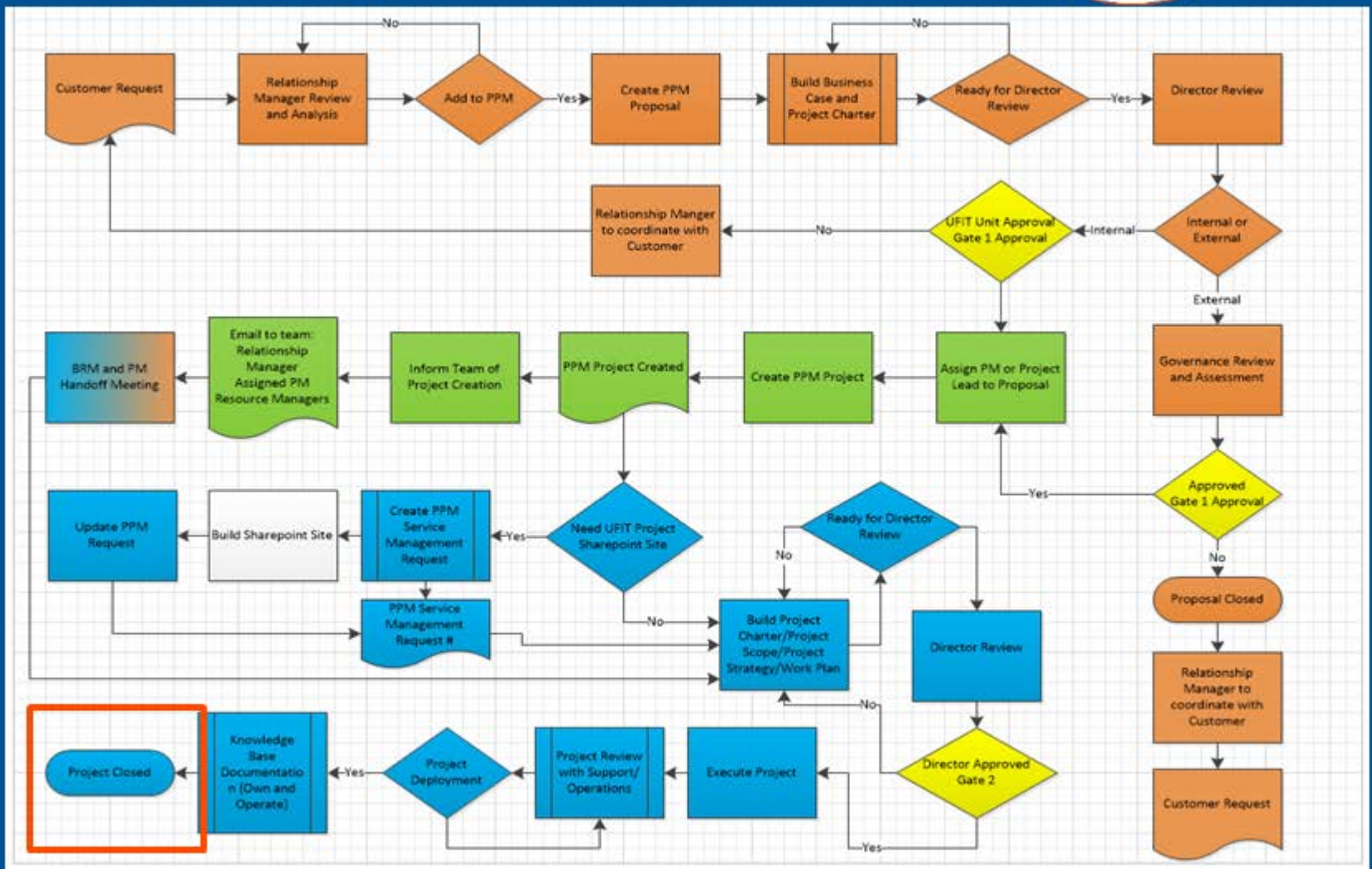
Closing Projects

- Stakeholder Acceptance
- Production Control Acceptance
- Lessons Learned
- Closeout Report



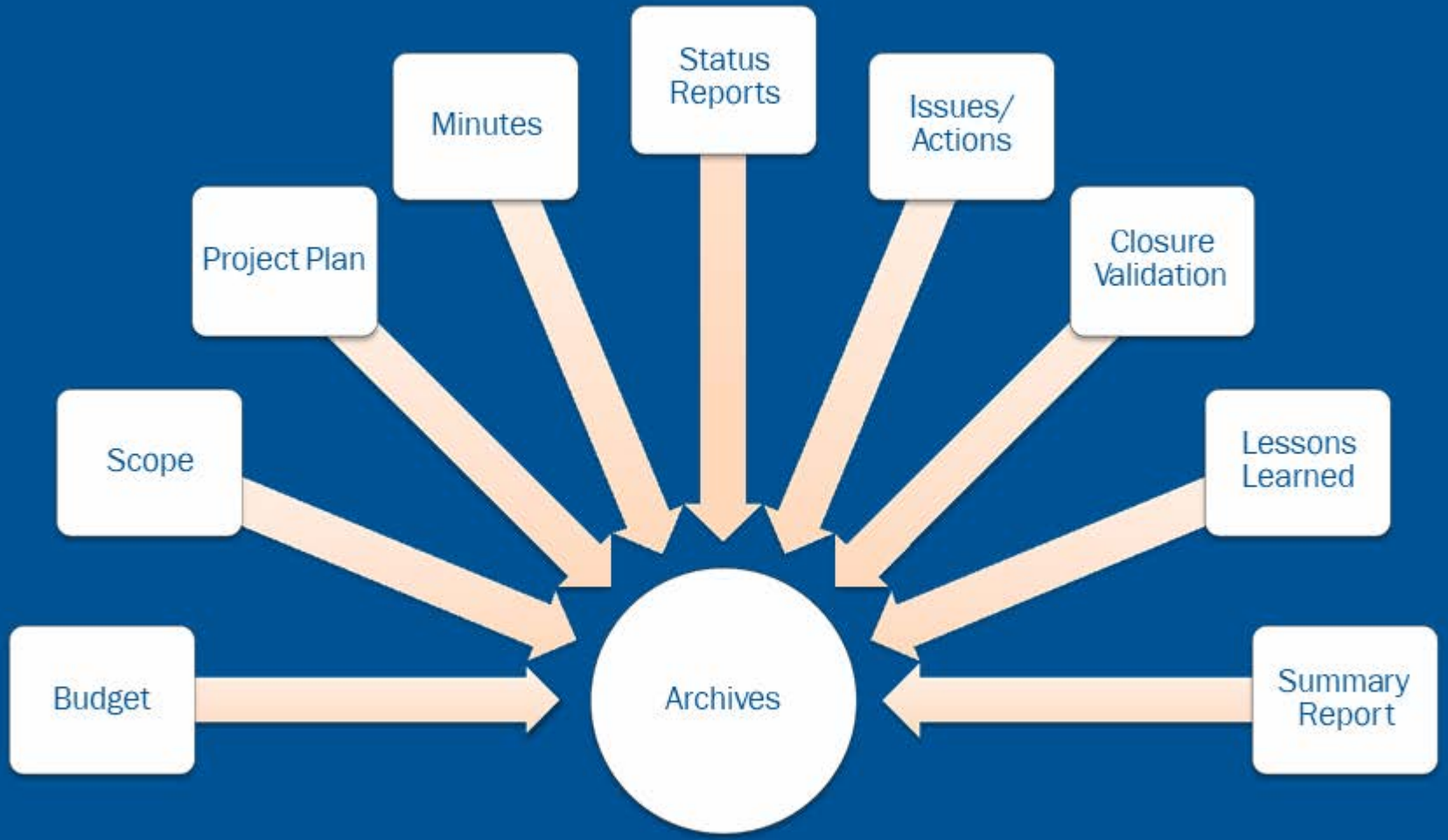
Activities	Tools
• Transition activities • Create archives • Validate completion • Leverage efforts • Celebrate	• Archival Documents • Closure Report • Lessons Learned

Closing a Project

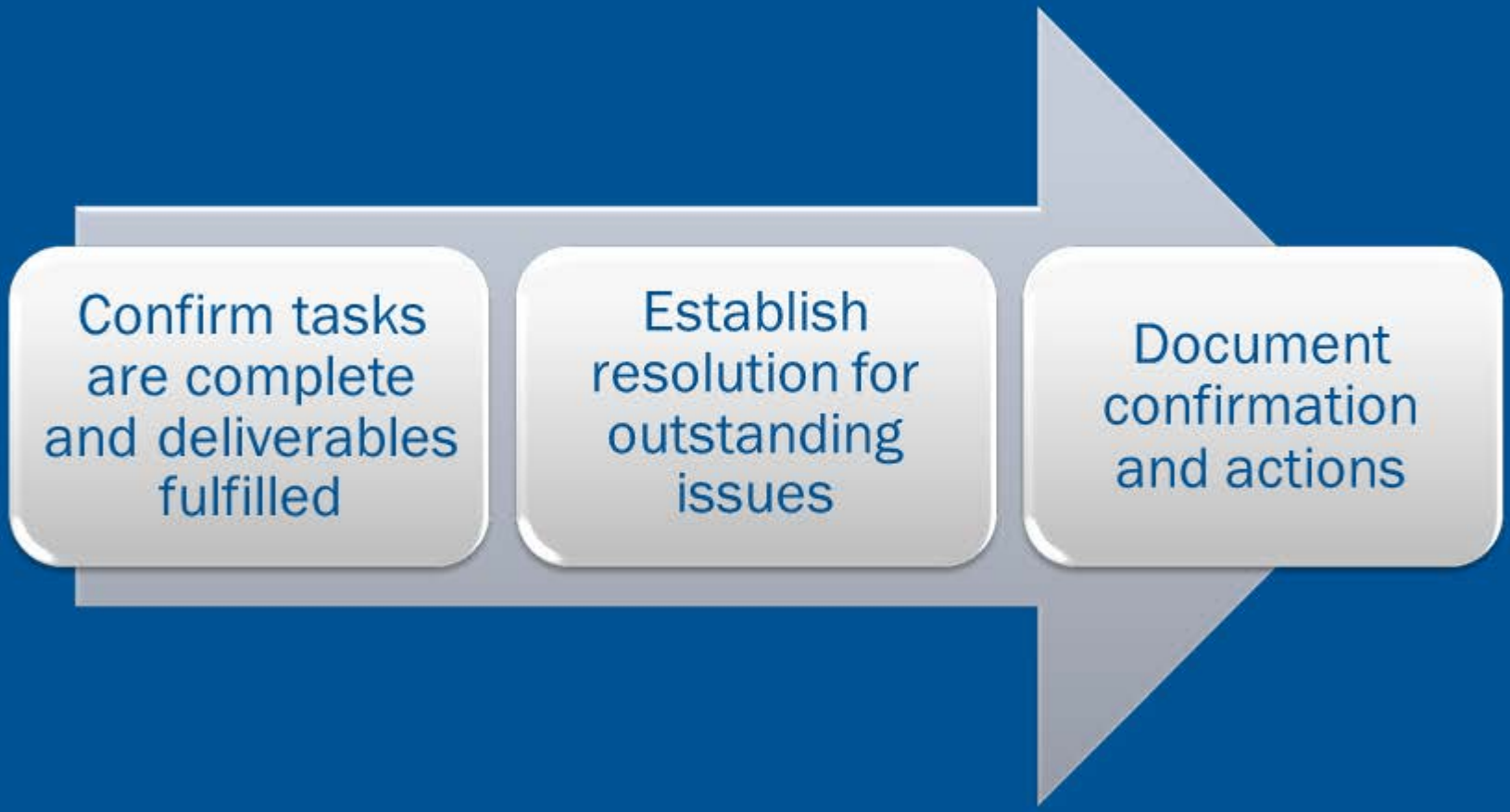


Transition Activities

Archive Documents



Validate Completion



Lessons Learned Analysis

Business Units

- Customer Satisfaction
- Business Opportunity

Processes

- Functional Support
- Methodology
- Executive Support

Deliverables

- Time
- Cost
- Quality
- Scope

What did we do right?

What did we do wrong?

What future recommendations can be made?

How, when, and to whom should information be disseminated?

Project Success Reporting

Project Metrics

- Timeline
- Budget to Actuals

Scope Comparison

- Original
- Additional

Project Quality

Incidents – Issues

Lessons Learned

Issues and Lessons Learned

Incidents-Issues

- No major issues were identified during the post-production testing

Lesson Learned

- Testing for certain use cases missed
- Testing several mobile devices using cloud based service was positive
- Approach will be leveraged in future with additional mobile applications

Collaboration

- Communication and coordination via the ISO office and CIO's Office
- Entities involved: CNS Open Systems, CNS Net Services, ES, ISO, and Academic Technology

Roles and Responsibilities

R: Does the step
A: Accountable for the step
C: Consulted with before
I: Informed when completed

Closing

Activity	Project Manager	Business Analyst	Developer	Testing Analyst	Database Admin.	User
Build Project Artifacts	A/R	A/R	A/R	A/R	A/R	I
Project Sign Off	A/R	I	I	I	I	A

Celebrate!

- Recognize success and efforts
- Involve all stakeholders
- Does not have to be monetary
- Recognize accomplishments throughout the project

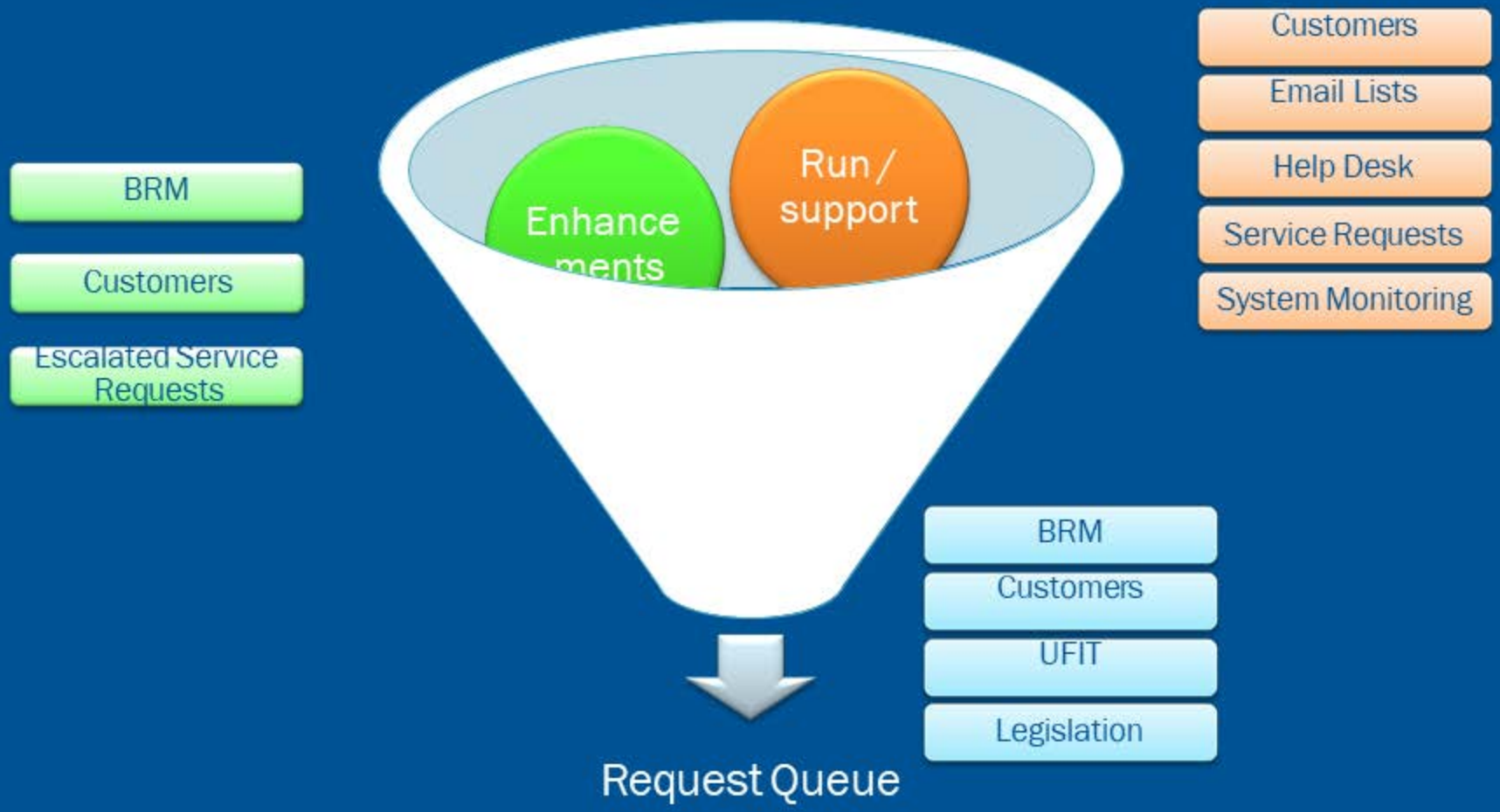
Project Portfolio Management

Practices and disciplines to optimize resource deployment toward strategic priorities

Establish portfolios linked to specific themes

Apply allocation, prioritization and management processes for each portfolio

UFIT Handles Requests from Many Channels

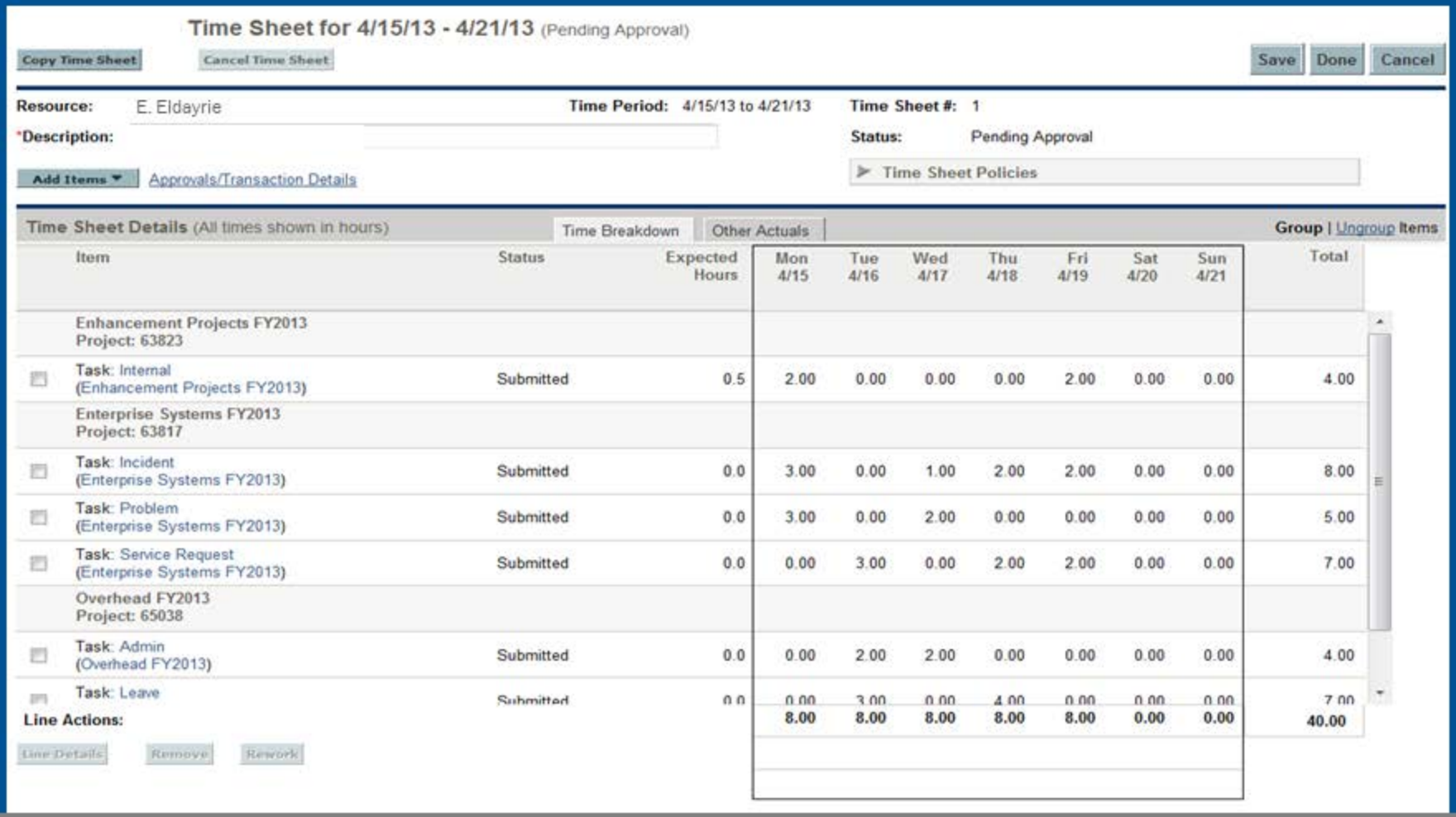


UFIT Projects

Portfolio Alignment

- UFIT: Supporting Teaching
- UFIT: Supporting Research
- UFIT: Supporting Students
- UFIT: Supporting Business
- UFIT: UFIT Projects

Time Sheets



Time Sheet for 4/15/13 - 4/21/13 (Pending Approval)

Copy Time Sheet | Cancel Time Sheet | Save | Done | Cancel

Resource: E. Eldayrie **Time Period:** 4/15/13 to 4/21/13 **Time Sheet #:** 1

***Description:** **Status:** Pending Approval

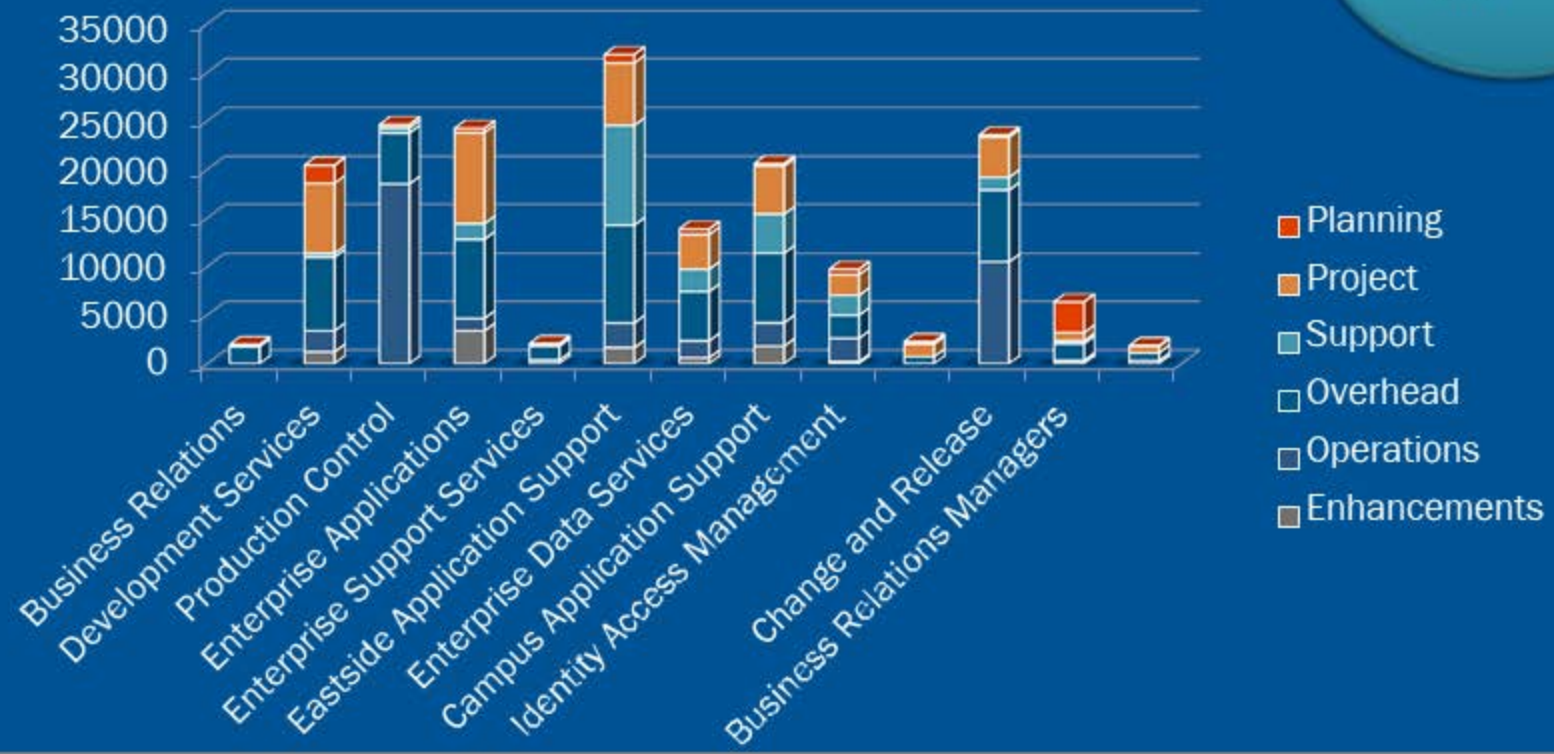
Add Items | Approvals/Transaction Details | Time Sheet Policies

Time Sheet Details (All times shown in hours) | Time Breakdown | Other Actuals | **Group** | Ungroup Items

Item	Status	Expected Hours	Mon 4/15	Tue 4/16	Wed 4/17	Thu 4/18	Fri 4/19	Sat 4/20	Sun 4/21	Total
Enhancement Projects FY2013 Project: 63823										
Task: Internal (Enhancement Projects FY2013)	Submitted	0.5	2.00	0.00	0.00	0.00	2.00	0.00	0.00	4.00
Enterprise Systems FY2013 Project: 63817										
Task: Incident (Enterprise Systems FY2013)	Submitted	0.0	3.00	0.00	1.00	2.00	2.00	0.00	0.00	8.00
Task: Problem (Enterprise Systems FY2013)	Submitted	0.0	3.00	0.00	2.00	0.00	0.00	0.00	0.00	5.00
Task: Service Request (Enterprise Systems FY2013)	Submitted	0.0	0.00	3.00	0.00	2.00	2.00	0.00	0.00	7.00
Overhead FY2013 Project: 65038										
Task: Admin (Overhead FY2013)	Submitted	0.0	0.00	2.00	2.00	0.00	0.00	0.00	0.00	4.00
Task: Leave	Submitted	0.0	0.00	3.00	0.00	4.00	0.00	0.00	0.00	7.00
			8.00	**8.00**	**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**40.00**

Line Actions: Line Details | Remove | Rework

Time Sheets Matter!



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Closing Workshop

- Refer back to the Keys to Successful Projects. Which tools or concepts presented today will contribute the most to successful UFIT projects?

- What obstacles might impede your application of these project management practices?

- What can be done to overcome these obstacles?