

# **Information Technology Projects: Project Management Process**

## **Introduction**

Ideas for Information Technology projects come from many sources: those who do the City's work, those who manage that work, City officials, citizens, and outside companies who offer products to assist work processes. Each project idea goes through a proposal review and approval process that examines proposals and selects or declines them based on benefits, costs, availability of resources, and competing projects relative merits.

The approval process allocates staff time and funding to carry out proposals that are accepted for implementation. Once approved, projects enter the management process described here.

## **Characteristics of a Project**

Staff time spent on information technology can be categorized into several categories. Work that includes maintenance, support and consulting activities should be scheduled and assigned by a supervisor. It tends to be reoccurring activities that can be predictably planned for. Unplanned activities are another category of work that often occurs due to system failures and must be responded to without notice.

Projects differ in that they have a discreet beginning and end with a defined set of resources. Other characteristics of projects include the involvement of several people and sometimes several departments working ad hoc, sequencing activities, and a single point of responsibility.

## **Major Steps in Project Management**

### ***Project Sponsor***

Each project has a sponsor. Project sponsors are selected for knowledge of the work being automated, organizational relationships to further the project, and interest in the outcome. Often this will be the head of the City department most involved in using the product when it's fully implemented or one of the Assistant City Managers.

The Project Sponsor is an advocate for the project and its objectives, ensuring that the project has visibility and support during its development and implementation. The sponsor may be called upon to resolve funding and staffing issues that are beyond the staff Project Coordinator's influence.

## ***Project Coordinator***

When projects are approved, a Project Coordinator must be assigned. The Project Coordinator is responsible for detailed project planning and coordinating activities. This person works closely with the sponsor to ensure that the project fulfills its purpose within the scope set by the approval document. He/she also works with staff supervisors to assign staffing resources and with departmental administration and the Budget Office for spending approvals.

Usually the Project Coordinator will be from the Information Systems Department but very large projects sometimes also involve counterpart Project Coordinators from the sponsor's department.

## ***Project Documents***

Each project will have documents unique to itself and other documents that are common to all approved projects. Project documents can be found in the Clarity software application. The Project Coordinator may also make them accessible by other means depending on who needs the information and their access to Clarity.

Common documents are the responsibility of the Project Coordinator and include:

- Project Charter—The project charter will typically have the following elements:
  - Purpose
  - Objectives
    - Organization Goals
    - Project Objectives
  - Project Scope
  - Authority
  - Authorization
  - Project Coordinator
  - Roles and Responsibilities
  - Project Organization Overview
  - Management Checkpoints
- Project Plan—The Project Plan is discussed under *Project Tracking* following. The Project Plan need not be included in Clarity if the project's "Tasks" tab has sufficient detail.
- Project Reports—Project Reports are discussed under *Reporting*.

## Project Tracking

The two main tools for tracking projects are:

1. Clarity project portfolio management software for timekeeping and management-level tracking.
2. Microsoft Project for task-by-task planning and tracking.

All projects within the Information Systems Department must be entered and tracked within Clarity. Clarity maintains records of project names, Project Coordinators, staff assignments, and staff time expended. Tracking projects within Clarity also allows departmental management to review each project's completion status and allows staff supervisors to examine workload for future assignments. Clarity's Documents and Discussions features allow staff and Project Coordinators to communicate with each other and with management without the need for extensive special reports. Project templates within Clarity allow users to create new projects with standard milestones for progress tracking. For more information contact the IS Department.

## Clarity Project Window

The screenshot shows the Clarity Project Properties window for the project '08-09 Cyborg Upgrade'. The interface includes a search bar at the top, a navigation menu on the left, and a main content area with tabs for Properties, Team, Tasks, Financial Plans, Risks/Issues/Changes, Processes, and Dashboard. The Properties tab is active, showing fields for Project Phase, Funding Agency, OMB EVA Entry Point, and UPI. The General section contains fields for Project Name (08-09 Cyborg Upgrade), Project ID (CYB), Description (Upgrade of the Cyborg payroll application), Manager (Shemelya, David), Program, and Template. The right side of the General section shows Goal (Maintain the Business), Priority (10), Status Indicator (Green), Status Comment, Risk (Calculated from Risk Properties Page), Strategic Alignment Score (0-100), Status (Approved), and Active (checked).

Field	Value
Project Name	08-09 Cyborg Upgrade
Project ID	CYB
Description	Upgrade of the Cyborg payroll application
Manager	Shemelya, David
Program	<input type="checkbox"/> (Project must not have tasks, staff members or be financially enabled to be converted to a program.)
Template	<input type="checkbox"/> (Project must not have time entries or be financially enabled to be marked as a template.)
Goal	Maintain the Business
Priority	10
Status Indicator	Green
Status Comment	
Risk (Calculated from Risk Properties Page)	
Strategic Alignment Score (0-100)	
Status	Approved
Active	<input checked="" type="checkbox"/> (To deactivate project, first

## Clarity Staff Assignments Window

Resource	Project Role	Time	Booking Status	Request Status	Start	Finish	% Allocation	Allocation	Actuals
Black, Tracy	IS Project Coordinator	✓	Hard	New	6/29/09	10/30/09	6.0%	42.24	59.00
Blevins, Rick	IS Senior Analyst	✓	Hard	New	6/29/09	10/30/09	10.0%	70.40	9.50
Brown, Audrey	IS Supervisor	✓	Hard	New	6/29/09	10/30/09	4.0%	28.16	22.50
Brown, Nancy	IS Supervisor	✓	Hard	New	6/29/09	10/30/09	2.0%	14.08	12.50
Frantz, Patrick	IS Supervisor	✓	Hard	New	6/29/09	10/30/09	4.0%	28.16	38.50
Geouge, Wade	IS Senior Analyst	✓	Hard	New	6/29/09	10/30/09	3.0%	21.12	3.00
Kureczka, Tom	IS Supervisor	✓	Hard	New	6/29/09	10/30/09	5.0%	35.20	0.00
Marion, Sonja	IS Senior Administrator	✓	Hard	New	6/29/09	10/30/09	5.0%	35.20	0.00
Martin, Patti	IS Senior Administrator	✓	Hard	New	6/29/09	10/30/09	5.0%	35.20	0.00
McDonald, John	IS Senior Analyst	✓	Hard	New	6/29/09	10/30/09	10.0%	57.20	0.00
Moore, Dan	IS Senior Administrator	✓	Hard	New	6/29/09	10/30/09	5.0%	35.20	2.00
Neiningner, David	IS Project Coordinator	✓	Hard	New	6/29/09	10/30/09	40.0%	281.60	92.50
Newman, Dennis	Chief Information Officer	✓	Hard	New	6/29/09	10/30/09	5.0%	35.20	4.00
Nichols, Lee	IS Project Coordinator	✓	Hard	New	6/29/09	8/17/09	4.0%	11.20	4.00

The other project management tool is Microsoft Project. It allows Project Coordinators to avoid cluttering management reporting and staff timesheets with the level of detail that the project team needs for daily task management. Not all staff members have MSProject, but they can work with the project plan because it allows users to save files in HTML format for general distribution.

### Reporting

For day-by-day project tracking, IS Department managers and supervisors may make inquiries of the Clarity software. In addition to Clarity, an IS Department Project Status Review meeting is held every two weeks (bi-weekly) to provide the opportunity for all interested parties including those outside the IS Department to follow the progress of any IS project. In this meeting, each Project Coordinator reviews his/her currently active projects via a Project Status Report for each project. The report includes:

- A brief narrative about progress.
- Whether the project is on schedule. (This may be one sentence and a copy of either the Clarity milestones or the Microsoft project plan in the report.)
- Whether the project is within budget.
- Accomplishments during the prior period. (This may be an extract of either the Clarity milestones or the Microsoft project plan.)
- Planned activities for the next period including any necessary resources to accomplish those tasks. (This may be an extract of either the Clarity milestones or the Microsoft project plan.)
- issues

A final report after project closure will document the results obtained and opportunities for further projects to expand the scope of the original project or to achieve additional objectives. This report may be in the form of minutes of the final project review meeting.

### ***Project Closure***

The final step in all projects is a project review meeting. The intent of this final meeting is to formally acknowledge the completion of the project and turn over the oversight of the product to the steady-state team. The meeting is led by the Project Coordinator under authority of the project sponsor and includes his/her supervisor, and all project team members.

Review meetings will include a review of significant accomplishments, obstacles encountered, and lessons learned. There may also be discussion of possible follow-on projects to propose for the future and of the need for an ongoing support project to record system maintenance requirements after implementation.

Comments or suggestions from the meeting are documented in a final project memo and filed with project documentation. At this point, the Project Coordinator closes the project within Clarity and MSProject. After closing in Clarity, resources will be unable to record additional time to the project and they will be available for reassignment.