PECS POWER ProMIS

Product Help Documentation

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POWER PROMIS

Power ProMIS is an end-to-end Project & Portfolio Management product powered by Microsoft Power Platform. It acts as a centralized hub for accessing and collaborating on all the organizations Project Portfolio Management activities and data.

The ease-of-use scheduler with a modern interface in the form of Project for Web will bring in the benefit of building a project plan with a robust schedule embracing both Hybrid and Agile models.

POWER PROMIS FEATURES:

- Application is built on Microsoft Power Platform and hence Data security, Availability, low Latency in data transfer.
- Consistency in user experience is guaranteed.
- Product components comply with PMI, PRINCE2, Scrum and SAFe standards and methodologies.
- Application can be tailored and customized based on organization's best practices.
- A complete digital PMO with governance models embedded.
- Solution Implementation – flawless in no time.
- Integration capability with other office 365 applications
- Use case-based training and recorded sessions for future use.
- Technical and functional support / handholding for the project team.
- Seamless capability to scale up.
- Enhancement of service regularly with new features & capabilities.
- Power ProMIS includes all Project, Program & Portfolio parameters.
- Schedule management - Deliver the project on time with a map for execution and delivery framework to tracking progress and managing change.
- Resource management - Deliver results with your resources today and plan to manage surplus and deficits across a planning horizon.

- Issue and risk management - Prevent, identify, and mitigate potential business or project-related risks and issues.

- Financial management - Adopt financial management processes and effectively track Project, Program & Portfolio budgeting.

- Time and task management - Utilize a centralized and common approach to time reporting and task management.

- Reporting & Business Intelligence- Collect, categorize, understand & visualize the Project, Program & Portfolio metrics & generates visually appealing dashboards.

Define → Analysis & Selection → Execution → Evaluation
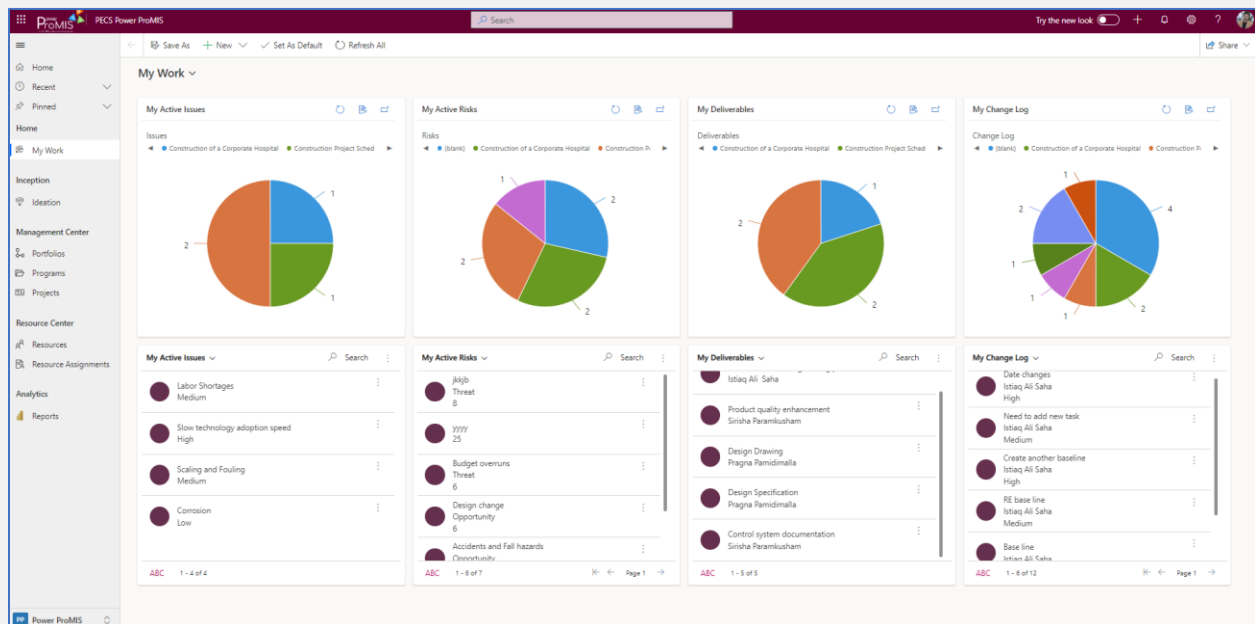
PORTFOLIO DEFINITION

Definition:

In project management, a portfolio is a collection of projects or programs managed together to achieve strategic objectives efficiently. It involves selecting, prioritizing, and overseeing projects to align with organizational goals, optimize resources, and deliver maximum value.

Purpose:

The purpose of a portfolio in project management is to:

Align with Strategic Objectives: Ensure that projects and programs within the portfolio contribute to the overall strategic goals and vision of the organization.

Optimize Resource Allocation: Allocate resources (such as budget, personnel, and time) effectively across projects to maximize efficiency and minimize waste.

Manage Risk: Spread risk across multiple projects and programs to mitigate the impact of potential failures or setbacks.

Facilitate Decision Making: Provide decision-makers with visibility into the entire project landscape, enabling informed decision-making regarding project selection, prioritization, and resource allocation.

Monitor Performance: Track and monitor the performance of projects and programs within the portfolio to ensure they are on track to achieve their objectives and deliver expected benefits.

Enhance Accountability: Establish clear accountability and responsibility for the success of projects and programs within the portfolio, promoting transparency and effective governance.

Overall, the purpose of a portfolio is to enable organizations to manage their projects strategically, optimize resource utilization, and ultimately achieve their strategic objectives efficiently.

Benefits:

Alignment with Strategy: Projects are selected and executed in alignment with the organization's strategic objectives.

Resource Optimization: Resources such as budget, time, and personnel are allocated efficiently across projects to maximize output.

Risk Management: Risk is spread across multiple projects, reducing the impact of failures on the organization as a whole.

Value Maximization: Projects with the highest potential for delivering value and achieving objectives are prioritized.

Performance Monitoring: Portfolio management allows for the monitoring of project performance to ensure they stay on track.

Stakeholder Engagement: Stakeholders have a clear view of project progress and can provide input and feedback as needed.

Adaptability: The portfolio can be adjusted to respond to changes in the business environment, ensuring ongoing alignment with organizational goals.

Governance and Accountability: Portfolio management establishes clear accountability and governance structures for project execution.
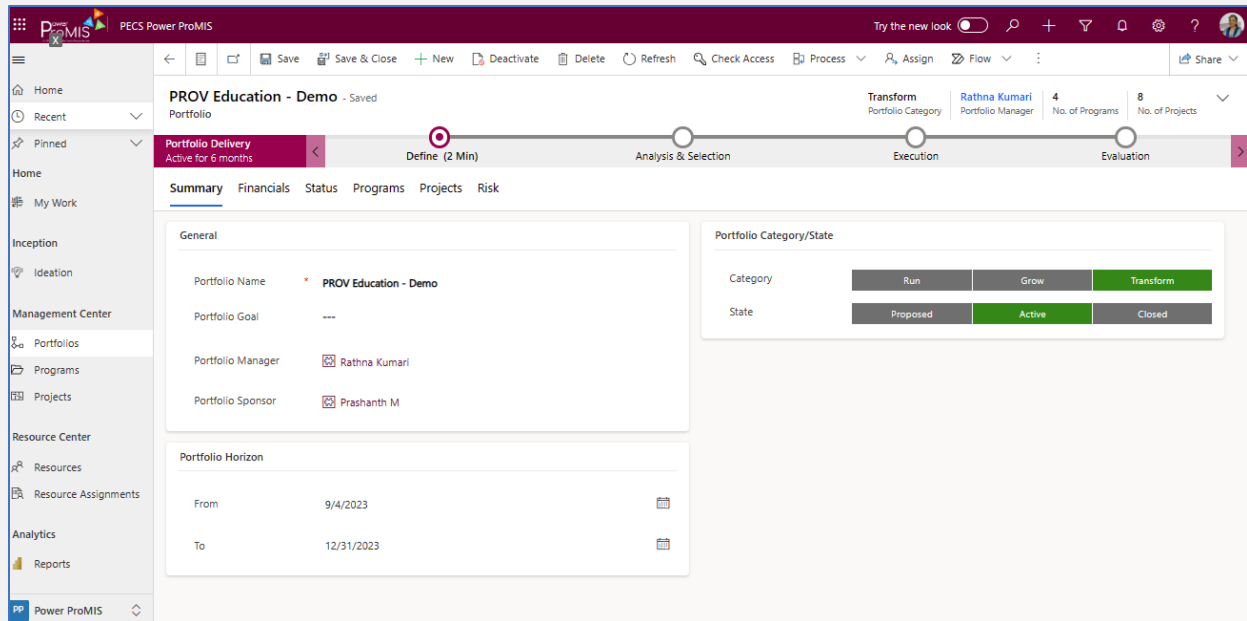

1. New Portfolio Creation

How to use: We need to click on the Portfolio tab in the management center, so that we can see Portfolio dashboard named my Portfolios.

Here we can edit the columns by using edit columns. We can see all the information related to each Portfolio.

PORTFOLIO SUMMARY:

1.1 Portfolio Summary

Field Description:

Field Name	Description
Portfolio Name	We should give the name of the Portfolio.
Manager	Name of the person who is responsible for portfolio.
Sponsor	Sponsor name should be given in this field.
State	We need to mention whether it is Proposed/Active/ Closed.
Portfolio category	The category of portfolio to be give (Innovation/Transformation/Enhancement)
Portfolio Goal	A Description of the Portfolio's Aim should be given.

How to use:

1. We need to Define the Terms in summary tab.
2. We need to fill all the details in each section named General, Portfolio Details, Portfolio Schedule.

PORTFOLIO FINANCIALS


1.2 Portfolio Financials

Field Description:

Field Name	Description
Portfolio Budget	Amount have to be given here for the Portfolio
Portfolio Income	It is a calculated field of Program income + Projects not in Program.
Portfolio Allocated Budget	It is the addition of Program Budget + Projects not in Program Budget.
Available Budget	It is the calculation field of Portfolio Budget-Portfolio Allocated Budget.
ROI	Calculated field of Return on Investment in percentage.
Program Budget	Budget that is allocated for Program. Which is automatically rolled up from the Programs.
Program Income	Automatically rolled up from the Programs.
Projects not in Program Budget	Which is rolled up from the projects.
Projects not in Program Income	Which is rolled up from the projects.
No of Programs	It is a calculated field which is given COUNT of Programs.
No of Projects	It is a calculated field which is given COUNT of Projects.
No of Projects not in Program	Which is directly rolled up from Projects to Portfolio.

No of Ideas	This is calculated as a COUNT rolled up to Portfolio from the IDEATION.

How to use:

1. Click on the Financials Tab
2. We need to enter the Portfolio Budget here.
3. Except Portfolio Budget all other columns are calculated fields and are rolled up from the Projects>Programs>Portfolio.

## PORTFOLIO STATUS:
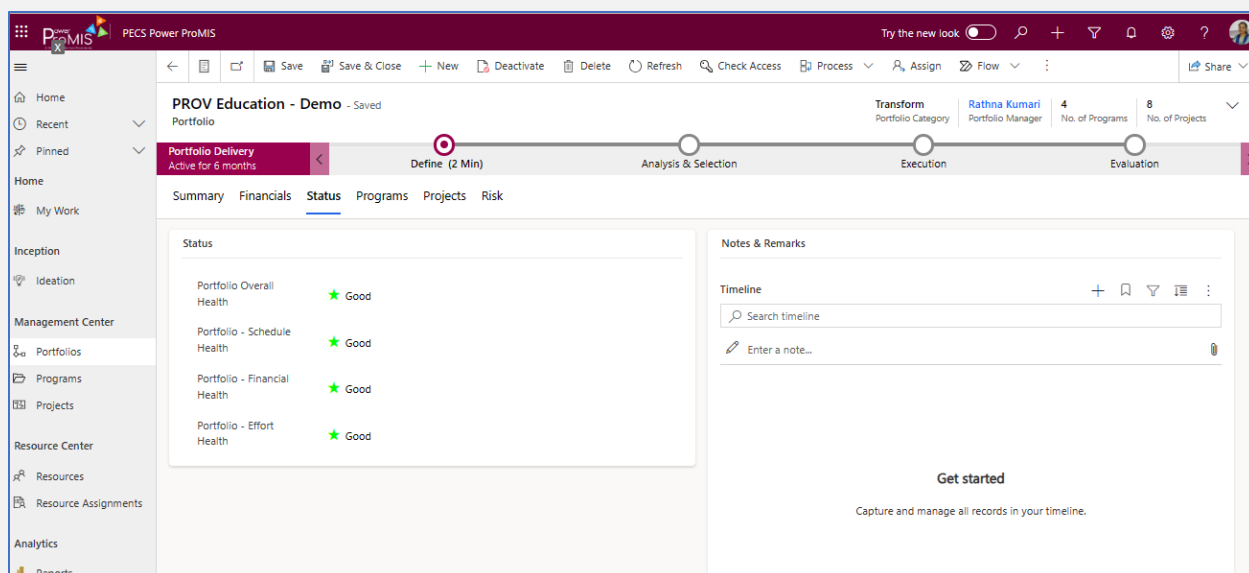
1.3 Portfolio Status

Field Description:

Field Name	Description
Portfolio overall Health	We need to select whether it is Good/At Risk/Bad.
Portfolio-Schedule Health	We need to select whether it is Good/At Risk/Bad.
Portfolio-Financial Health	We need to select whether it is Good/At Risk/Bad.
Portfolio-Effort Health	We need to select whether it is Good/At Risk/Bad.
Notes and remarks	We can search the Timeline here and we can write text here. If we want to upload any report or file there is an option to upload the file.

How to use:

1. Click on the Status Tab.
2. We need to give the Status for Portfolio Overall Health, Portfolio-Schedule Health, Portfolio-Financial Health, Portfolio-Effort Health.
3. We need to select whether it is Good/At Risk/Bad.
4. **We can write Notes and Remarks in the Specified Field.**

PORTFOLIO PROGRAMS:
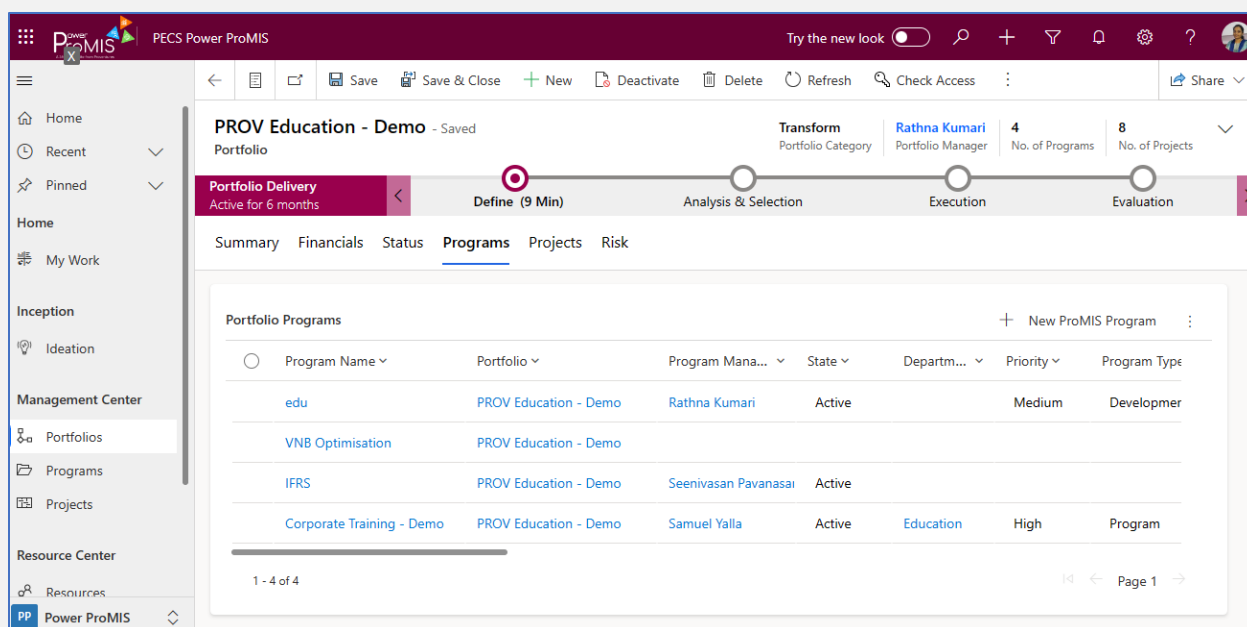
1.4.1 Portfolio Programs

Note: We can create the New Program here or we can select the Program from already existing programs from the list.

Field Description:

Field Name	Description
Program Name	Program name should be given here.
Portfolio	We need to give the Program belongs which Portfolio. (Name of the portfolio)
Program manager	Name of the Program Manager
State	We need select the state of the Program from the drop down, whether it is active/proposed/closed.
Department	We need to give the Name of the Department.

Priority	Prioritization should be done within parameters like Low/Medium/High/Very High.
Program type	We need to select Program type from drop down having Development, Support, Enhancement, customer, Program or Other.
Program Start	Start date of the Program.
Program finish	Expected Finish date of the Program.
Description	Description of the Program to be given here.
Business Case	Business case to be given here.
Program Budget	Automatically rolled up to Portfolio from the Program.
Benefit Name	Automatically rolled up to Portfolio from the Program.
Tangible	Automatically rolled up to Portfolio from the Program.
Description of Benefit	Automatically rolled up to Portfolio from the Program.
Overall-Health Indicator	Automatically rolled up to Portfolio from the Program.
Schedule Health Indicator	Automatically rolled up to Portfolio from the Program.
Work/Effort Health Indicator	Automatically rolled up to Portfolio from the Program.
Cost Health Indicator	Automatically rolled up to Portfolio from the Program.
Program Income	Automatically rolled up to Portfolio from the Program.

1.4.5 Quick create New ProMIS Program.

How to Use:

1. We need to Click on the Programs Tab.
2. If we select an already existing Program all the fields are automatically filled up.
3. If we want to create a new Program, we need to click on New ProMIS Program.
4. Then we need to fill in all the details as shown in 1.4.2 Quick create New ProMIS Program.

PORTFOLIO PROJECTS:

1.5.1 Portfolio Projects

Field Description:

Field Name	Description
Name	This field will be rolled from the Projects.
Start Date	Start date of a Project.
Planned Finish Date	Planned finish date of a selected Project.
Overall Health	Rolled up to Portfolio from the Projects.
Overall-Schedule Health	Rolled up to Portfolio from the Projects.
Owner	Project Owner
Program	Project belongs to which Program must be given.
Portfolio	Project belongs to which Portfolio we should mention here.

Note: We can create the New Project here or we can select the Project that is already existing from the list.

How to use:

1. We need to Click on the Projects Tab.
2. If we select an existing Project, then all the fields are automatically filled up.
3. If we want to create a new Project, we need to click on the New Project Tab.

PORTFOLIO RISK:
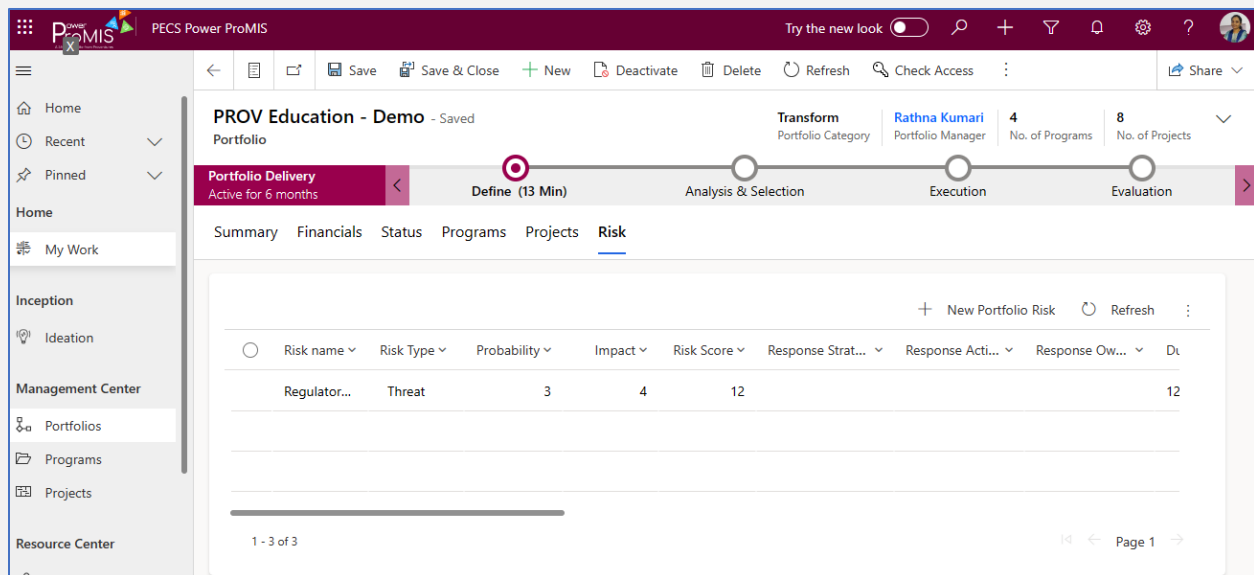
1.6.1Portfolio Risk

Field Description:

Field Name	Description
Risk Name	Name of the Risk to be given here.
Risk Type	Select the type of risk (Opportunity, Threat).
Probability	In a scale of 1-5 enter the probability.
Impact	In a scale of 1-5 enter the Impact.
Risk Score	Probability and impact give Risk score
Response Strategy	Select one of the options (Avoid, Mitigate, Transfer, Accept, Exploit, Enhance, Share).
Response Action	Describe the action.
Response Owner	Name of the owner to be given.
Due Date	Enter the due date of the risk.
Post Response Probability	In a scale of 1-5 enter the probability

Post Response Impact	In a scale of 1-5 enter the Impact
Post Response Score	Probability and impact will give the Score
Management Reserve Allocated	Management Reserve allocated for the risks.
Management Reserve Utilized	Management reserve Amount that is utilized for the risks.
Management Reserve Available	Remaining amount of Management reserves.
Contingency Proposed	The amount proposed to mitigate the risk
Contingency Approved	The amount approved to mitigate the risk
Contingency Available	Remaining amount /available amount
Contingency Utilized	The amount is used to mitigate the risk.

How to use:

1. Click on the New Portfolio Risk.
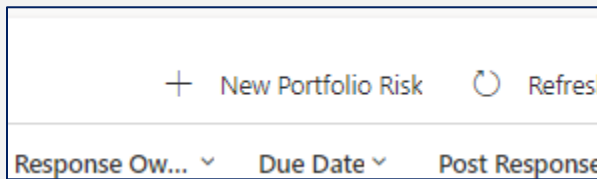
2. We need to fill in the Details of Risk, Risk response, Post Mitigation analysis, Contingency Reserves.

1.6.4 Portfolio risk

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New Portfolio Risk
Portfolio Risk · Portfolio Risk main form ⌄

Details **Risk Response** Post Mitigation Analysis Contingency Reserve

Risk Response

Response Strategy   ---

Response Action   ---

Response Owner   ---

3. We need to fill fields of Risk Response

New Portfolio Risk
Portfolio Risk · Portfolio Risk main form ⌄

Details Risk Response **Post Mitigation Analysis** Contingency Reserve

Analysis

Post Response
Probability   ---

Post Response Impact   ---

🔒 Post Response Score   ---

4. We need to fill all the fields of Post Mitigation Analysis.

5. We need to fill in the details of Contingency Reserves.

PORTFOLIO ANALYSIS & SELECTION

Definition: Portfolio analysis and selection involve evaluating and choosing projects or programs for inclusion in a portfolio based on strategic goals, risks, benefits, and resource constraints. It's about assessing projects, aligning them with organizational objectives, and selecting those that offer the most value while managing risks effectively.

Purpose: The purpose of portfolio analysis and selection is to:

1. **Align Projects with Strategy:** Ensure that projects within the portfolio are aligned with the organization's strategic goals and objectives.
2. **Optimize Resource Allocation:** Allocate resources effectively across projects to maximize value and minimize waste.
3. **Manage Risk:** Assess and mitigate risks associated with individual projects to protect the overall portfolio from potential failures.
4. **Enhance Decision-Making:** Provide decision-makers with insights to make informed choices about which projects to pursue and how to allocate resources.

5. **Ensure Portfolio Balance:** Maintain a balanced portfolio that includes a mix of projects with varying levels of risk, return, and strategic importance.
6. **Maximize Portfolio Value**: Create a portfolio that maximizes overall value and contributes to the organization's long-term success.

Overall, portfolio analysis and selection enable organizations to strategically manage their projects and ensure they are aligned with business objectives.

Benefits:

1. **Strategic Alignment:** Ensures that projects align with the organization's strategic goals and objectives, contributing to long-term success.
2. **Resource Optimization:** Allocates resources efficiently across projects, maximizing the utilization of budget, time, and personnel.
3. **Risk Management:** Spreads risks across the portfolio, reducing the impact of failures on the overall organization.
4. **Informed Decision Making:** Provides data-driven insights for decision-makers to prioritize projects and allocate resources effectively.
5. **Value Maximization:** Prioritizes projects with the highest potential for delivering value and achieving organizational objectives.
6. **Performance Monitoring:** Facilitates ongoing monitoring of project performance, enabling timely interventions to keep projects on track.
7. **Stakeholder Engagement:** Promotes transparency and collaboration among stakeholders by providing visibility into the project portfolio.
8. **Adaptability:** Allows for adjustments to the portfolio in response to changes in the business environment or strategic priorities.
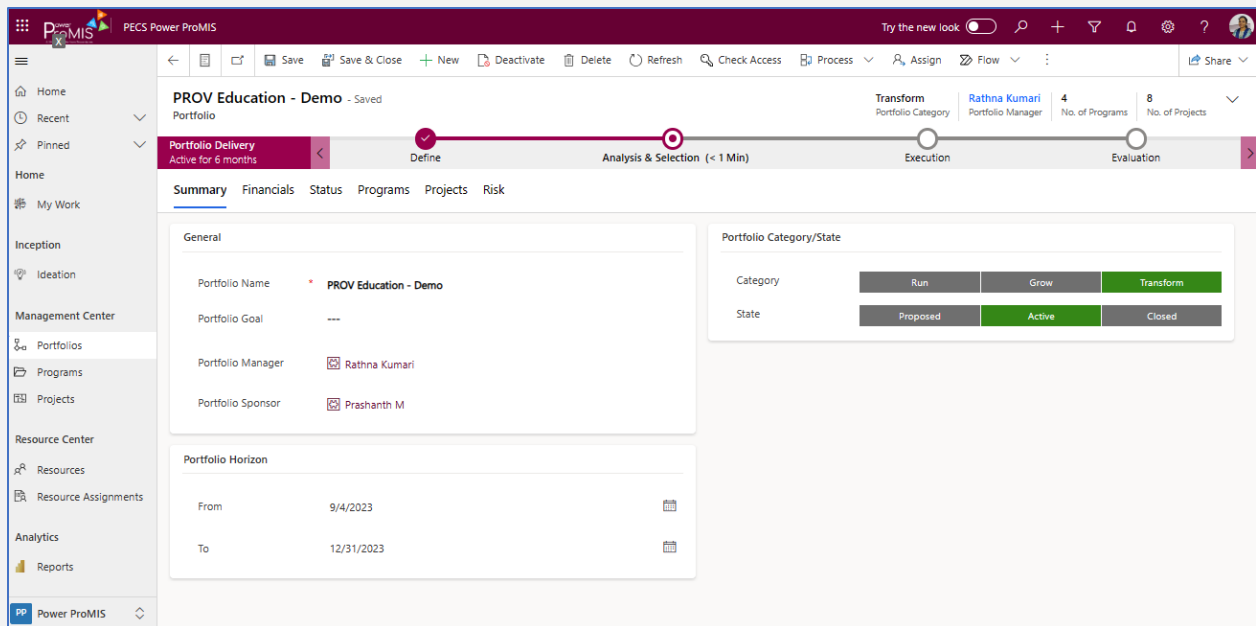
PORTFOLIO EXECUTION

Definition: Portfolio execution is the active implementation of selected projects within a portfolio to achieve defined objectives, involving project management, resource allocation, communication, risk management, performance monitoring, issue resolution, quality assurance, change management, adaptation, documentation, and reporting.

Purpose: The purpose of portfolio execution is to efficiently implement projects, align with strategic goals, optimize resources, manage risks, monitor performance, resolve issues, ensure quality, adapt to changes, facilitate communication, and achieve project objectives.

Benefits:

Efficient Resource Utilization: Optimizing the allocation of resources across projects to maximize productivity and minimize waste.

Strategic Alignment: Ensuring that project execution aligns with the organization's strategic objectives and goals.

Risk Management: Identifying, assessing, and mitigating risks to minimize their impact on portfolio performance.

Performance Monitoring: Continuously monitoring project progress and performance against predefined targets to ensure successful outcomes.

Issue Resolution: Promptly addressing and resolving any issues or challenges encountered during project execution to keep projects on track.

Quality Assurance: Implementing quality assurance processes to ensure that project deliverables meet specified requirements and adhere to quality standards.

Communication Facilitation: Fostering effective communication and collaboration among project teams, stakeholders, and portfolio managers.

Achievement of Objectives: Ultimately, portfolio execution aims to achieve the defined objectives and deliver the intended benefits of the projects within the portfolio.
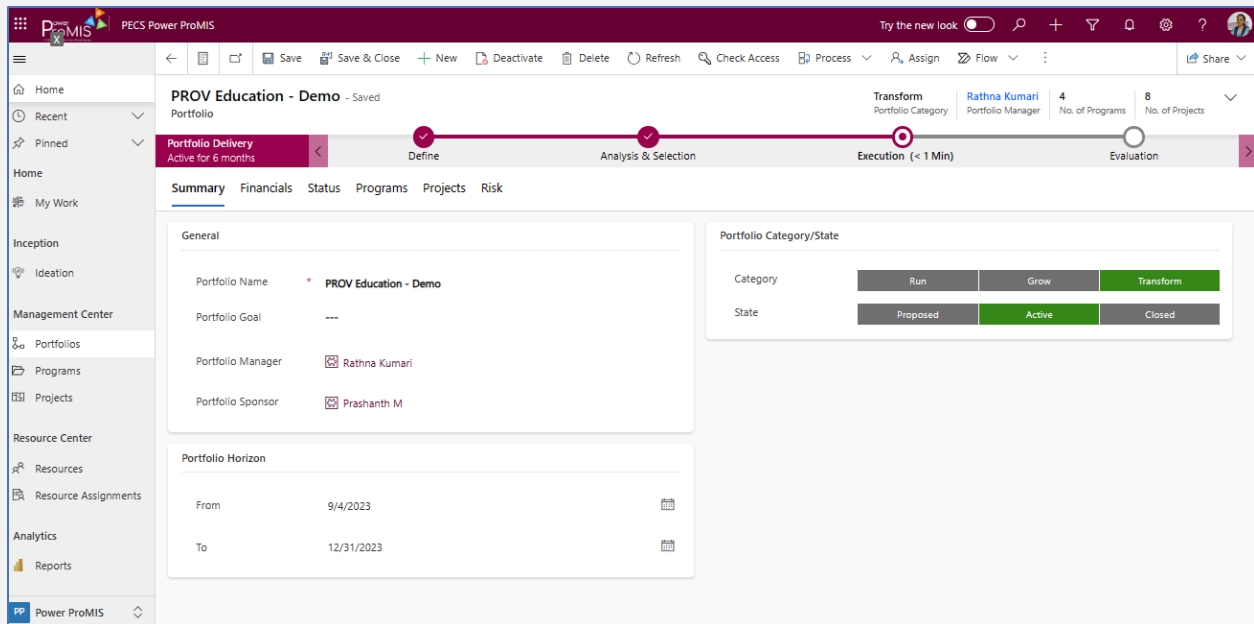
PORTFOLIO EVALUATION

Definition: Portfolio evaluation is the systematic assessment of a collection of projects or investments to measure performance, identify strengths and weaknesses, optimize resource allocation, manage risk, support decision-making, enhance accountability, and facilitate continuous improvement.

Purpose: The purpose of portfolio evaluation is to assess the performance, effectiveness, and alignment of projects or investments within a portfolio. It aims to measure performance, identify strengths and weaknesses, optimize resource allocation, manage risk, support decision-making, enhance accountability, and facilitate continuous improvement.

Benefits:

Performance Measurement: Assessing how effectively the portfolio is achieving its objectives and delivering desired outcomes.

Strategic Alignment: Ensuring that the portfolio aligns with the organization's overarching goals and priorities.

Resource Optimization: Identifying opportunities to allocate resources more efficiently across projects or investments within the portfolio.

Risk Management: Evaluating and mitigating risks effectively to protect the portfolio from potential setbacks.

Informed Decision-Making: Providing valuable insights to support strategic decisions about the portfolio's direction and priorities.

Accountability: Establishing clear accountability for portfolio performance among stakeholders, fostering transparency and responsibility.

Continuous Improvement: Using evaluation findings to refine portfolio strategies and practices, promoting ongoing enhancement and adaptability.

Definition: A Program is a structured and coordinated set of activities, projects, or initiatives designed to achieve specific objectives or outcomes. Programs are often broader in scope and more complex than individual projects and typically involve multiple related projects or activities that work together to fulfill a common goal. Programs are commonly used in various fields, including business, government, non-profit organizations, and project management.

Benefit:

1. Clear Objectives: Programs have well-defined objectives and goals that they aim to achieve.

2. Interconnected Projects: Programs are made up of multiple interrelated projects or activities that collectively contribute to the program's success.

3. Resource Management: Programs often involve the allocation and management of resources, such as budgets, personnel, and materials, across various projects.

4. Long-Term Focus: Programs are typically long-term endeavors as they may span several months or even years.

5. Complexity: Programs are often more complex than individual projects, requiring careful planning and coordination.

6. Monitoring and Evaluation: Programs involve ongoing monitoring and evaluation to ensure that they are on track to achieve their objectives.

7. Stakeholder Involvement: Various stakeholders, such as sponsors, beneficiaries, and partners, are usually involved in programs.

Figure 1.1(Program)

How to use:

1. Click on the Program as shown in the above figure1.1.

2. Create a New Program.

3. Overview of the program will be shown in the fields given in the above figure1.1

PROGRAM LIFE CYCLE

Formulation → Planning → Delivery → Closure

PROGRAM FORMULATION

Definition: Program formulation refers to the process of developing and defining a program's goals, objectives, strategies, and plans before its actual implementation. This phase involves carefully designing and structuring the program, outlining its purpose, and specifying how it will address a particular need, problem, or opportunity. Program formulation typically includes assessing the requirements, available resources, and potential challenges to create a comprehensive blueprint for the

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program's success. It serves as the initial planning stage that sets the direction and framework for the entire program.

Benefit:

Program formulation offers several benefits, which are crucial for the success of any initiative. Here are some of the key advantages:

1. **Clarity of Purpose:** It helps in clearly defining the purpose and goals of the program, ensuring that all stakeholders understand the intended outcomes.

2. **Alignment:** Program formulation aligns the program's objectives with the needs it aims to address, ensuring that it targets the right issues.

3. **Efficiency:** By carefully planning strategies and resource allocation, it promotes efficient use of resources, reducing wastage and redundancies.

4. **Resource Allocation:** It allows for the identification of the resources required for the program, aiding in budgeting and resource management.

5. **Stakeholder Buy-In:** Involving stakeholders during formulation can lead to their commitment and support, increasing the likelihood of program success.

6. **Risk Mitigation:** Early identification of potential risks and challenges allows for the development of risk mitigation strategies.

7. **Measurability:** Clearly defined objectives and outcomes make it easier to establish performance metrics and evaluate the program's success.

8. **Transparency:** It promotes transparency by providing a documented plan, which can be shared with funders, participants, and other stakeholders.

9. **Legal and Ethical Considerations:** It ensures that the program complies with legal and ethical standards.

10. **Improved Decision-Making:** Program formulation provides a basis for informed decision-making throughout the program's lifecycle.

GENERAL

Definition:

A general definition would refer to a broad description of the program's purpose, objectives, scope, and key components. It provides a high-level overview of what the program aims to achieve and how it will

be executed. It typically includes information about the target audience, expected outcomes, and timeline.

Benefit:

1. **Achievement of Goals:** Successful program delivery helps achieve the intended goals and objectives, whether they are related to education, healthcare, social services, or any other area.

2. **Improved Efficiency:** Well-structured program delivery can lead to increased efficiency in resource allocation and utilization, reducing wastage and enhancing cost-effectiveness.

3. **Enhanced Accountability:** Effective program delivery often includes mechanisms for tracking progress and outcomes, promoting transparency, and ensuring accountability among stakeholders.

4. **Stakeholder Satisfaction:** When programs are delivered effectively and meet their intended purposes, it tends to increase stakeholder satisfaction, including beneficiaries, funders, and implementing agencies.

5. **Data for Decision-Making:** Program delivery often involves data collection and analysis, which can provide valuable insights for evidence-based decision-making and future program planning.

6. **Positive Reputation:** Successful program delivery can enhance the reputation of the implementing agency or organization, which may lead to increased support and partnerships for future initiatives.
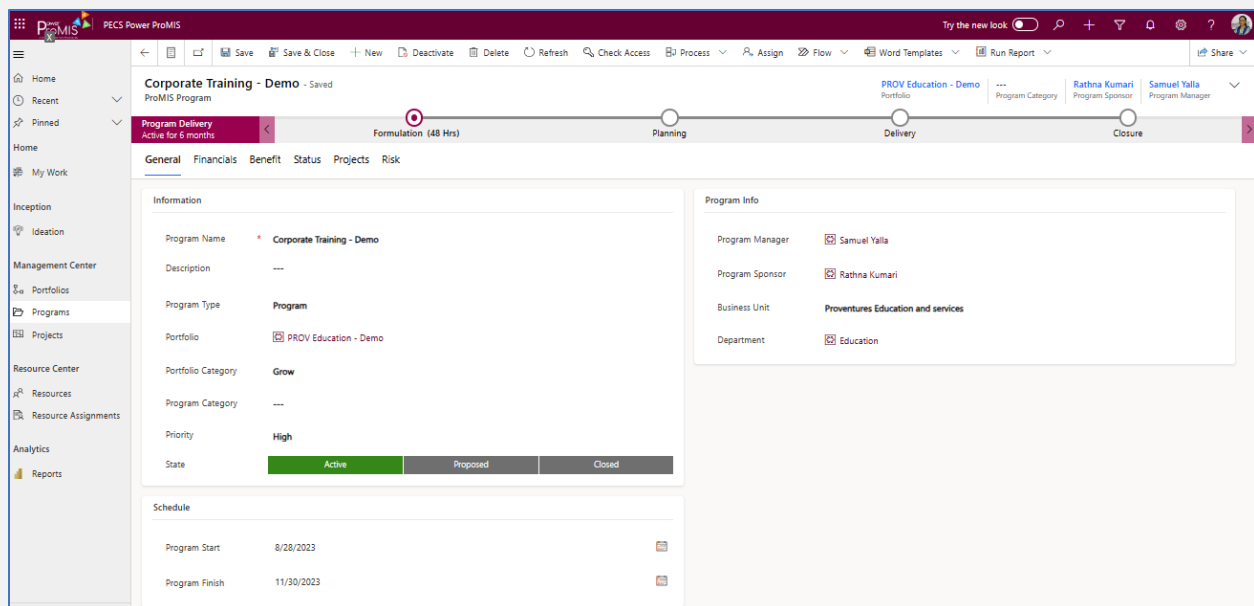
Field Description:

Field Name	Description
Program Name	Respective Name of the Program to be given.
Description	Description of the program
Program Type	Within the program type, you should choose from the following options: Development, Support, Enhancement, Customer, Program, Others.
Portfolio	If portfolios are available, then choose the appropriate one or else create a new portfolio.
Portfolio Category	Within the Portfolio Category, you should choose from the following options: Customer satisfaction, Grow Business, Run Business, Transformation, Others.
Program Category	Within the Program Category, you should choose from the following options: Run, Grow, Transformation.
Priority	Within the Priority, you should choose from the following options: Low, Medium, High, Very High.
State	Within the state, you should choose from the following options: Active, Proposed, Closed.
Program Start	Enter the start date of the program.
Program Finish	Enter the finish date of the program.
Program Manager	Enter the program manager name.
Program Sponsor	Enter the program sponsor name.
Business Unit	Describe the group of people responsible for this program.
Department	If department are available, then choose the appropriate one or else create a new department.

How to use:

1. Click on formulation.
2. Go to general tab and fill in the necessary information as shown in figure 2.1.

Definition:

Financial refers to the specific terms, metrics, or criteria used to assess, measure, or describe financial aspects within that program. Revenue, Expenses, Profit or Loss, Return on Investment (ROI), Financial Goals, Budget Categories these financial definitions are essential for ensuring clarity and consistency in financial reporting, analysis, and decision-making within the program. The specific definitions can vary widely depending on the nature and goals of the program, industry standards, and regulatory requirements.

Benefit:

1. **Resource Allocation:** It helps allocate resources (money) efficiently to different aspects of the program, ensuring that funds are used where they are needed most.

2. **Goal Setting:** Financial planning allows for the setting of clear financial goals and objectives, providing a roadmap for the program's success.

3. **Budget Control:** It helps control and monitor expenses, preventing overspending and ensuring that the program stays within its budgetary limits.

4. **Risk Management:** Financial planning assesses potential financial risks and uncertainties, allowing for strategies to mitigate and manage them.

5. **Accountability:** It establishes accountability for financial decisions and outcomes within the program, making it clear who is responsible for financial management.

6. **Performance Measurement:** Financial metrics enable the assessment of the program's financial performance, helping stakeholders understand its financial health.

7. **Resource Efficiency:** Efficient financial management can lead to cost savings, allowing resources to be used more efficiently and effectively.

8**. Investment Decision-Making:** Financial planning aids in making informed investment decisions, ensuring that capital is invested in projects or initiatives that offer a good return on investment.

9. **Sustainability:** A well-planned financial program can help ensure the long-term sustainability of the initiative by managing cash flow and reserves effectively.

10. **Stakeholder Communication:** Clear financial planning and reporting facilitate effective communication with stakeholders, including investors, donors, and partners.

11. **Compliance:** It ensures compliance with financial regulations and reporting requirements, reducing the risk of legal or regulatory issues.

12. **Adaptability:** Financial planning allows for adjustments as circumstances change, ensuring that the program can adapt to unexpected financial challenges.
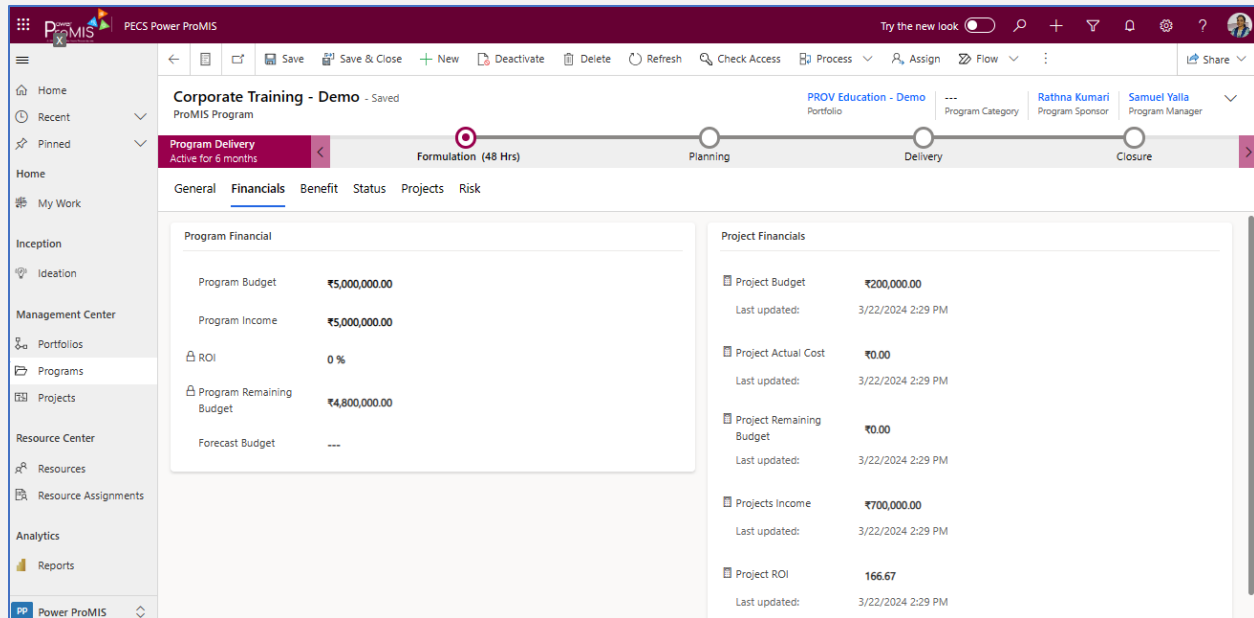

Figure 3.1(Financial)

Field Description:

Field	Description
Program budget	Manually enter the Program Budget
Program income	Manually enter the Program Income
ROI%	This is a Calculated field calculates from the Program Income
Program remaining budget	Calculated Field. It subtracts the actual budget from the planned budget
Forecast budget	Manually enter the estimates for future business revenue
Project budget	Calculated Field. Calculates from the Project.
Project actual cost	Calculated Field. Calculates from the Project
Project remaining	Calculated Field. Calculates from the Project
Project income	Calculated Field. Calculates from the Project
Project ROI	Calculated Field. Calculates from the Project

How to use:

1. Click on the Financial tab.
2. Give appropriate numbers in the Program Budget, Program Income & Forecast Budget Fields.
3. Click on Save and Exit.

PROGRAM BENEFITS

Definition: A benefit for a program refers to a clear and detailed explanation of the advantages, positive outcomes, or specific gains that individuals, organizations, or stakeholders can expect to achieve by participating in or supporting that program. This definition helps articulate the program's value and purpose.

Benefit:

1. **Objectives:** It outlines the specific goals and objectives the program aims to achieve, both short-term and long-term.

2. **Outcomes:** Describes the desired results and changes that participants or beneficiaries should experience because of the program.

3. **Value Proposition:** Highlights the unique and valuable aspects of the program, such as how it addresses a particular need, solves a problem, or provides a solution.

4. **Benefits to Stakeholders:** Specifies how different stakeholders, including participants, sponsors, and the wider community, will benefit from the program.

5. **Measurable Benefits:** Where applicable, it includes quantifiable metrics or key performance indicators (KPIs) to assess and track the program's success in delivering benefits.

6. **Time Frame:** Indicates when the benefits are expected to be realized, whether they are immediate or occur over a more extended period.
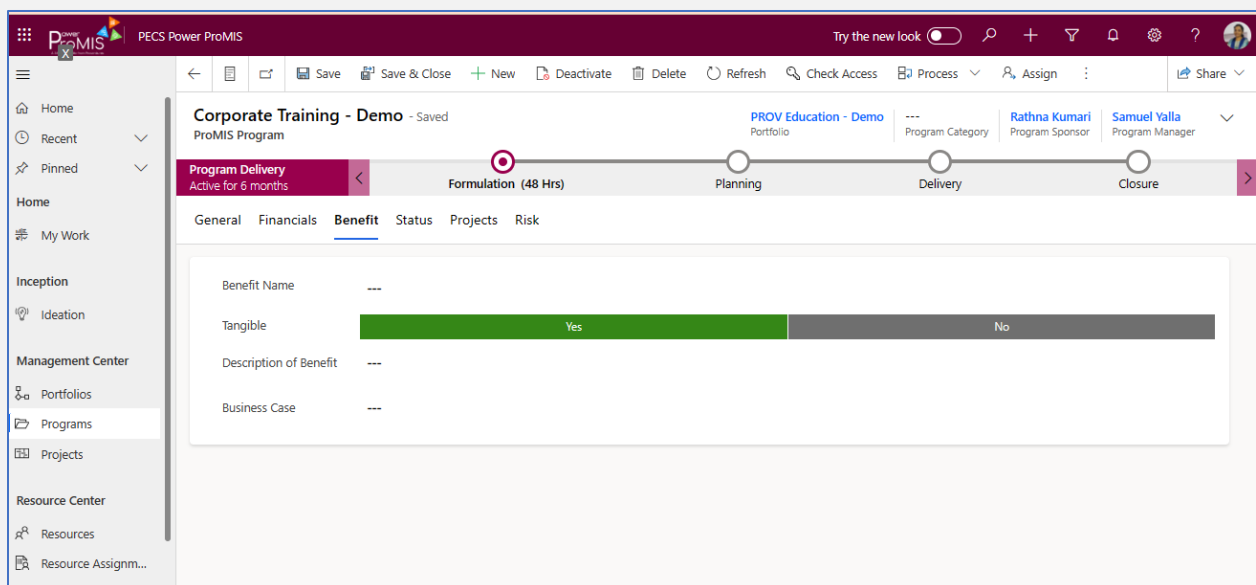

Figure4.1(Benefit)

Field Description:

Field	Description
Benefit name	Give the name of the benefit
Tangible	It is a multiple-choice field. Should either Yes or No
Description of benefit	Describe about the benefit
Business case	Justify the business case

How to use:

1. Click on the benefit tab.
2. Fill the fields with appropriate data.
3. Please save and close.

STATUS

Definition: The status of a program refers to its current condition or state of progress at a given point in time. It provides an overview of how well the program is advancing in terms of its goals and objectives. The status can be described in various ways: On Track, Behind Schedule, Completed, At Risk, On Hold, Canceled, In Planning, In Development, In Evaluation, In Transition, In Maintenance. The status of a program is often communicated through program reports, project management tools, or meetings to keep stakeholders informed about its progress and any necessary actions or decisions. It is a critical component of program management and helps ensure that objectives are met, issues are addressed, and resources are allocated appropriately.

Benefit:

1. Transparency: Status updates provide transparency regarding the program's progress, allowing stakeholders to have a clear understanding of where the program stands in terms of its goals and objectives.

2. Accountability: A clear status holds program managers and team members accountable for meeting milestones and delivering on objectives. It helps identify areas where action or adjustments are needed.

3. Early Issue Detection: Status reporting allows for the early detection of issues, risks, or challenges that may impede the program's success, enabling proactive problem-solving.

4. Effective Decision-Making: Program managers and stakeholders can make informed decisions based on the program's status. This includes decisions related to resource allocation, scope changes, or risk mitigation.

5. Resource Optimization: Knowing the status of the program helps in allocating resources more efficiently. If a program is running smoothly, resources can be allocated elsewhere, while underperforming areas can be addressed.

6. Alignment with Objectives: Status reports help ensure that the program remains aligned with its goals and objectives, as any deviations or setbacks can be identified and addressed promptly.

7. Stakeholder Communication: Regular status updates keep stakeholders informed and engaged, helping to manage expectations and build trust among program participants and supporters.

8. Risk Management: Status reports allow for the identification and management of risks that could affect the program's success, reducing the likelihood of negative impacts.

9. Success Celebration: When the program is on track or has successfully achieved its objectives, the status can be used to celebrate and acknowledge accomplishments, boosting team morale.

10. Efficiency Improvement: By monitoring status, program managers can identify areas where process improvements or optimizations are needed, which can lead to increased efficiency and productivity.

11. Performance Measurement: The status of a program provides data for performance measurement and evaluation, allowing for an assessment of how well the program is meeting its intended outcomes.

12. Adaptation to Changing Circumstances: Status reports help the program adapt to changing circumstances, such as market conditions, technological advancements, or evolving stakeholder needs.
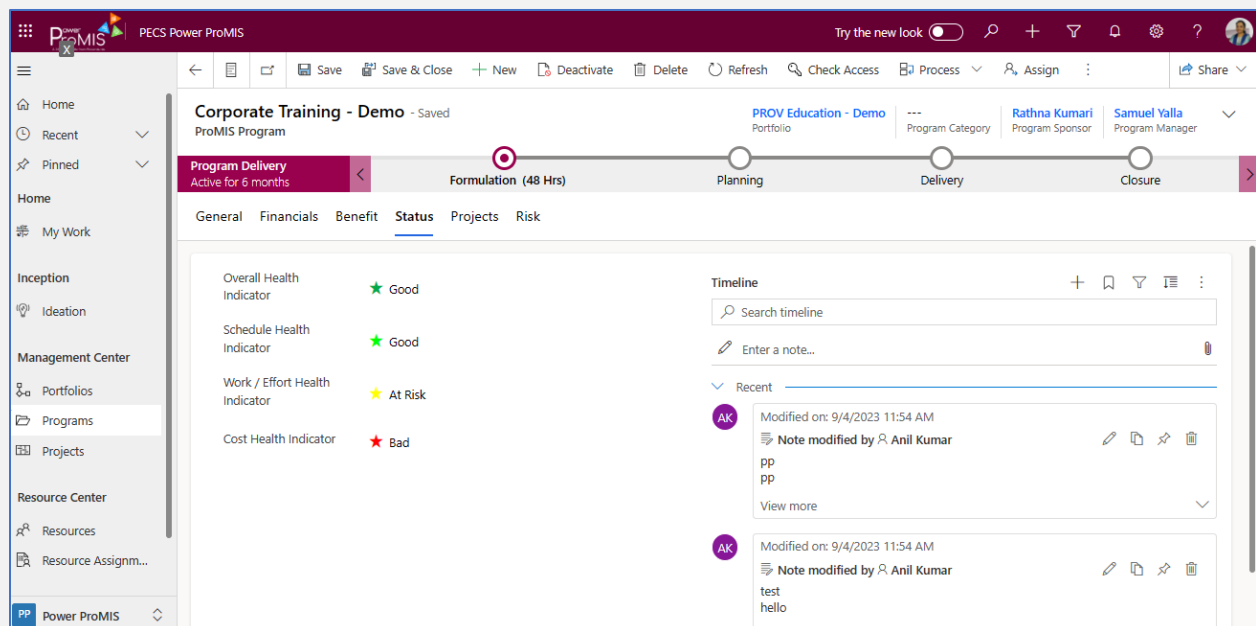

Figure5.1(Status)

Field Description:

Field	Description
Overall, Health Indicator	Manually we need to select the status Ex: (Good, At risk, Bad)
Schedule Health Indicator	Manually we need to select the status Ex: (Good, At risk, Bad)
Work/Effort Health Indicator	Manually we need to select the status Ex: (Good, At risk, Bad)
Cost Health Indicator	Manually we need to select the status Ex: (Good, At risk, Bad)
Timeline	Important Milestones or Notes will be maintained here

How to use:

1. Click on Status Tab.
2. Give the appropriate status for each field.
3. Save and close.

PROJECTS

Definition: Project within a program involves planning, executing, monitoring, and controlling the individual projects to ensure they align with the program's goals and objectives. It also includes managing resources, risks, and stakeholders within each project to meet its defined outcomes. In summary, a project in program management is a component or workstream within a broader program designed to achieve a specific part of the program's objectives.

Benefits: Projects within a program offer several benefits:

1. **Alignment with Program Goals**: Projects contribute to achieving the overarching goals of the program, ensuring that resources are used effectively.

2. **Specialization**: Each project can focus on specific tasks or deliverables, allowing for specialized teams and expertise.

3. **Risk Management**: Programs can spread risks across multiple projects, reducing the impact of a single project's failure.

4. **Resource Allocation**: Projects help allocate resources (human, financial, and technical) to various components of the program.

5. **Measurable Outcomes**: Projects provide clear milestones and deliverables, making it easier to measure progress and success.

6**. Flexibility**: Multiple projects can adapt to changes independently, enhancing the program's overall flexibility.

7. **Stakeholder Engagement**: Different projects can involve various stakeholders, ensuring their involvement and satisfaction.

8. **Continuous Improvement**: Each project can incorporate lessons learned, improving the program.

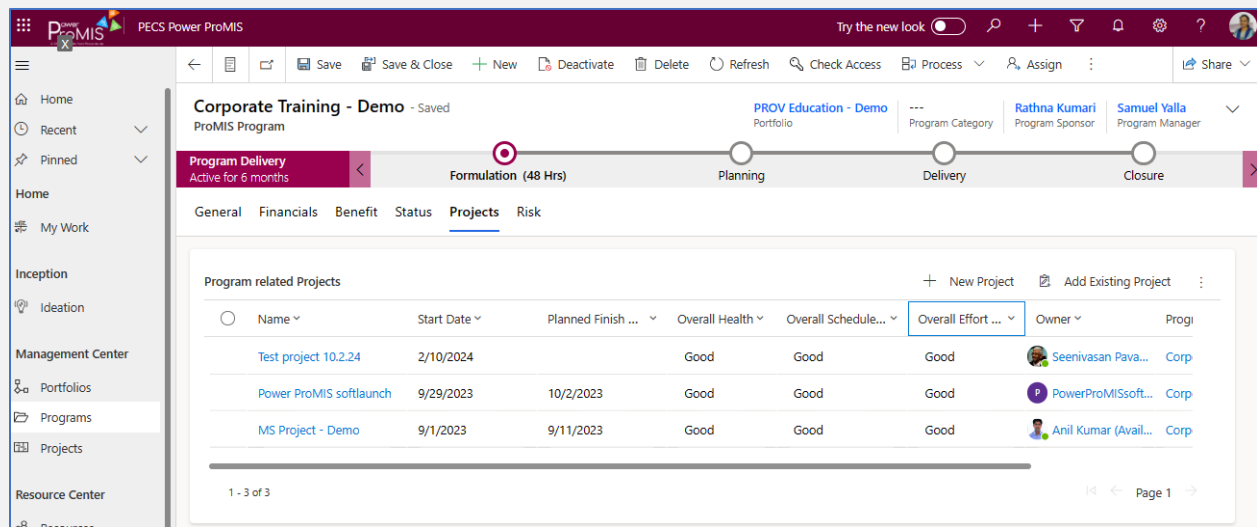9. **Efficiency**: Projects enable concurrent work, accelerating the achievement of program goals.

Figure6.1(Projects)

Field Description:

Field	Description
Name	Please enter the name of the project
Description	Mention the necessary Description
Calendar templet	create an appropriate calendar templet
Portfolio	Select the portfolio under which this project belongs to
Program	Select the program under which this project belongs to
Project Manager	Mention the project manager name
Calendar	Select the appropriate calendar as per the requirement
Project status	Select the status of the project (Proposed, Active)
Schedule mode	Automated field

Estimated start	Give the Start date of the project
Planned finish date	Automated field comes from scheduling tool
Expected finish	Give the end date of the project
Duration (Days)	Automated field comes from scheduling tool
Effort (Hours)	Automated field comes from scheduling tool
Timeline	Overall timeline of the project
Overall health	Manually we need to select the status Ex: (Good, At risk, Bad)
Overall schedule health	Manually we need to select the status Ex: (Good, At risk, Bad)
Overall cost health	Manually we need to select the status Ex: (Good, At risk, Bad)
Overall effort health	Manually we need to select the status Ex: (Good, At risk, Bad)
Overall issue health	Manually we need to select the status Ex: (Good, At risk, Bad)
Overall resource health	Manually we need to select the status Ex: (Good, At risk, Bad)
Effort completed (Hours)	Automated field comes from scheduling tool
Description	Mention the project description
Sponsor	Enter the name of the Sponsor
Portfolio	Select the portfolio under which this project belongs to
Program	Select the program under which this project belongs to
Objectives	Objective of the project should be given

Note: We can create the New Project here or we can select the Project that is already existing from the list.

RISK

Definition: Risk can be defined as the potential for an event or circumstance to have a negative impact on the program's objectives or outcomes. These risks can be associated with various factors such as technical issues, budget constraints, scope changes, or external factors like market conditions. Effective risk management involves identifying, assessing, and mitigating these potential risks to minimize their impact on the program's success.

Benefit: While risks in a program typically seen as potential sources of harm or disruption, they can also have some benefits:

1. **Innovation:** Risks can encourage teams to think creatively and find innovative solutions to overcome challenges. Facing risks often leads to the development of new technologies or methodologies.

2. **Learning and Growth**: Dealing with risks provides valuable learning experiences for team members. It can lead to skill development, increased knowledge, and improved problem-solving abilities.

3. **Opportunity for Improvement:** Risks may highlight weaknesses or inefficiencies in the program, which, when addressed, can lead to process improvements and increased efficiency.

4. **Competitive Advantage**: Successfully managing risks can position a program or organization as a leader in the industry. It demonstrates the ability to adapt and excel under challenging circumstances.

5. **Enhanced Preparedness**: The process of identifying and assessing risks ensures that the team is better prepared to handle unexpected issues when they arise.

6. **Stakeholder Confidence**: Effective risk management can build trust and confidence among stakeholders, as they see that the program is well-prepared to handle potential setbacks.

7. **Resource Allocation**: Identifying and mitigating risks can lead to more efficient allocation of resources and budget, avoiding unnecessary expenses and delays.

Risk Details:

Figure7.2 (Risk)

Field	Description
Risk name	Enter the name of the risk
Risk type	Select the type of risk (Opportunity, Threat)
Due date	Enter the due date of the risk
Risk owner	Enter the name of the owner
Status	Automated Field
Contingency	Enter the Planned actions
Probability	In a scale of 1-5 enter the probability
Impact	In a scale of 1-5 enter the Impact
Risk score	Probability and impact give Risk score

Risk Response:

Field	Description
Response Strategy	Select one of the options (Avoid, Mitigate, Transfer, Accept, Exploit, Enhance, Share)
Response Action	Describe the action
Response Owner	Name of the owner to be given

Post-Mitigation Analysis:

Field	Description
Post Response Probability	In a scale of 1-5 enter the probability
Post Response impact	In a scale of 1-5 enter the Impact
Post Response score	Probability and impact give Score

**Contingency Reserve:**

Field	Description
Contingency proposed	Enter the Contingency proposed amount
Contingency approved	Enter the amount approved
Contingency utilized	Enter the amount utilized
Contingency available	Calculated field. Calculates from approved, utilized.
Contingency plan	Describe the contingency plan.

PROGRAM PLANNING

Program planning is the process of defining the goals, objectives, strategies, and activities necessary to achieve a set of related outcomes or benefits within a program. It involves a structured approach to envisioning, organizing, and managing the components of a program to ensure its successful execution. Key aspects of program planning typically include:

1. **Goal Setting**: Clearly defining the overarching purpose or mission of the program, including the desired outcomes and benefits it aims to achieve.

2. **Objective Definition**: Breaking down the program's goals into specific, measurable, and time-bound objectives that provide a roadmap for implementation.

3. **Resource Allocation**: Identifying the required resources, including budget, personnel, technology, and materials, to support the program.

4. **Timeline Development**: Creating a detailed schedule or timeline that outlines when key activities and milestones will be accomplished.

5. **Stakeholder Engagement**: Involving relevant stakeholders, both internal and external, to gather input, ensure alignment with organizational goals, and secure support.

6. **Risk Assessment**: Identifying potential risks and challenges that may arise during program execution and planning how to mitigate or respond to them.

7. **Monitoring and Evaluation**: Establishing mechanisms to track and assess the progress and performance of the program against its objectives.

8. **Communication Plan**: Defining how information will be communicated within the program team and to external stakeholders.
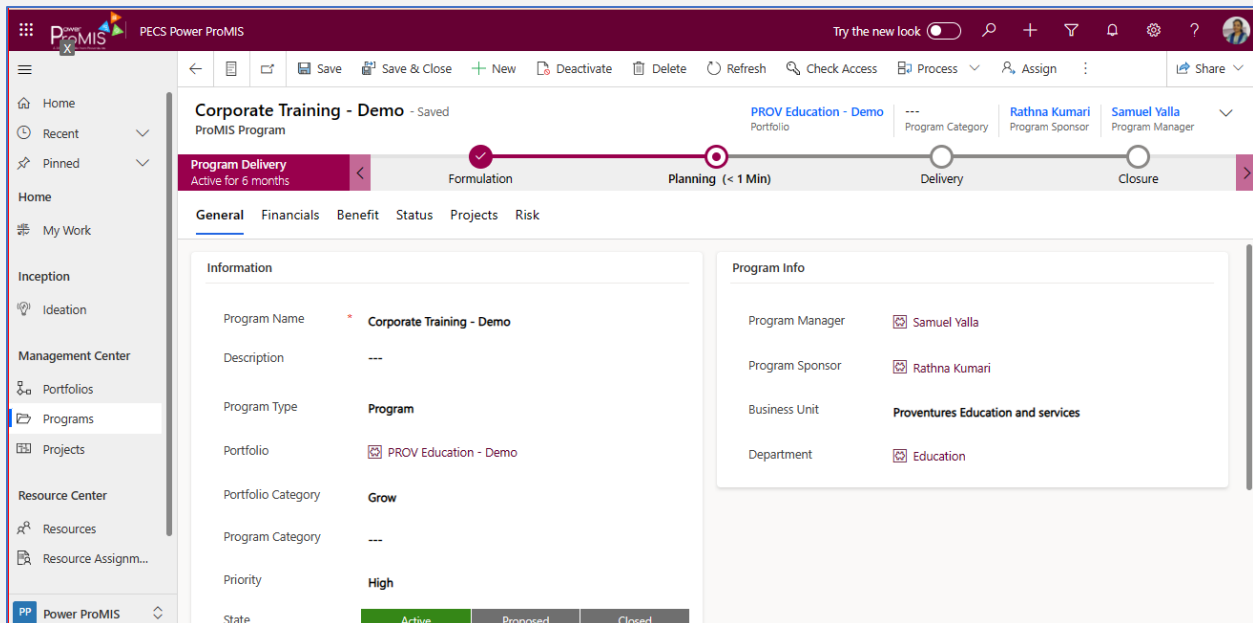
PROGRAM DELIVERY

Program delivery, in the context of project and program management, refers to the phase in which the planned activities, tasks, and components of a program are executed and implemented to achieve the defined goals and objectives. It involves putting the program plan into action and ensuring that all necessary resources are allocated and utilized effectively. Key elements of program delivery include:

1. **Execution of Activities**: Carrying out the specific tasks and activities outlined in the program plan to meet the defined objectives.

2. **Resource Management**: Proper allocation and utilization of resources, including budget, personnel, equipment, and materials, to support the execution of program activities.

3. **Quality Assurance**: Ensuring that the program's deliverables and outcomes meet the established quality standards and requirements.

4. **Timeline Management**: Adhering to the program's schedule and timeline to ensure that activities are completed on time.

5. **Stakeholder Engagement:** Engaging and communicating with relevant stakeholders throughout the delivery phase to keep them informed and address their needs and concerns.

6. **Monitoring and Control**: Continuously monitoring the progress of the program and implementing corrective actions as needed to address issues, mitigate risks, and keep the program on track.

7. **Documentation and Reporting**: Maintaining accurate records of program activities, achievements, challenges, and outcomes, and providing regular reports to stakeholders and management.
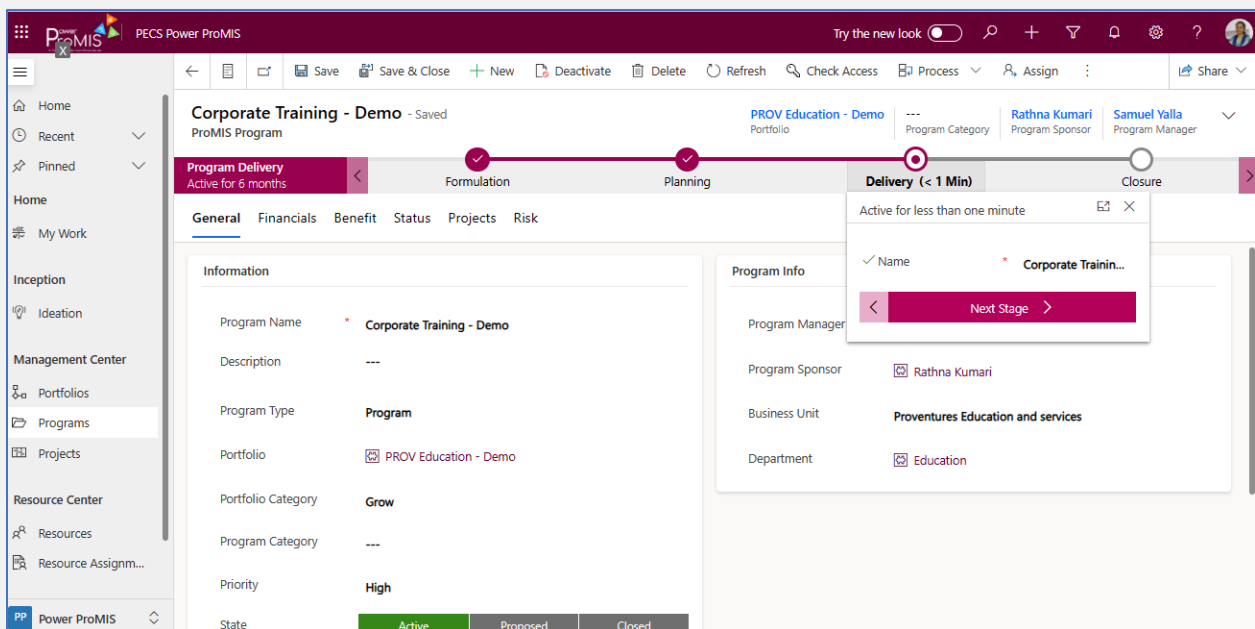
PROGRAM CLOSURE

Program closure, also known as program termination, refers to the final phase of a program's life cycle where the program is formally and systematically ended. This phase involves a series of activities and processes to conclude all program-related operations and ensure a smooth transition into a post-program state. Key elements of program closure include:

1. **Completion of Objectives**: Ensuring that all program objectives, goals, and deliverables have been met or completed as planned.

2. **Documentation**: Preparing and organizing all program-related documentation, reports, and records, including lessons learned, for future reference and auditing purposes.

3. **Financial Closure**: Reviewing and closing out all financial aspects of the program, including budget reconciliations, expense settlements, and financial reporting.

4. **Stakeholder Communication**: Informing all relevant stakeholders about the program's closure and its outcomes, including any changes that may affect them.

5. **Transition Planning**: Preparing for the transition of any ongoing work or responsibilities to other departments, teams, or individuals as needed.

6. **Evaluation and Lessons Learned**: Conducting a comprehensive evaluation of the program's performance, outcomes, and processes, and capturing lessons learned to inform future projects and programs.

7. **Resource Release**: Releasing program resources, including personnel, equipment, and facilities, for use elsewhere in the organization or project.

8. **Legal and Contractual Closure**: Addressing any legal or contractual obligations associated with the program, such as terminating contracts, resolving outstanding legal matters, and ensuring compliance with relevant regulations.

9. **Final Reporting**: Preparing a final program report that summarizes the program's achievements, challenges, and recommendations for improvement.
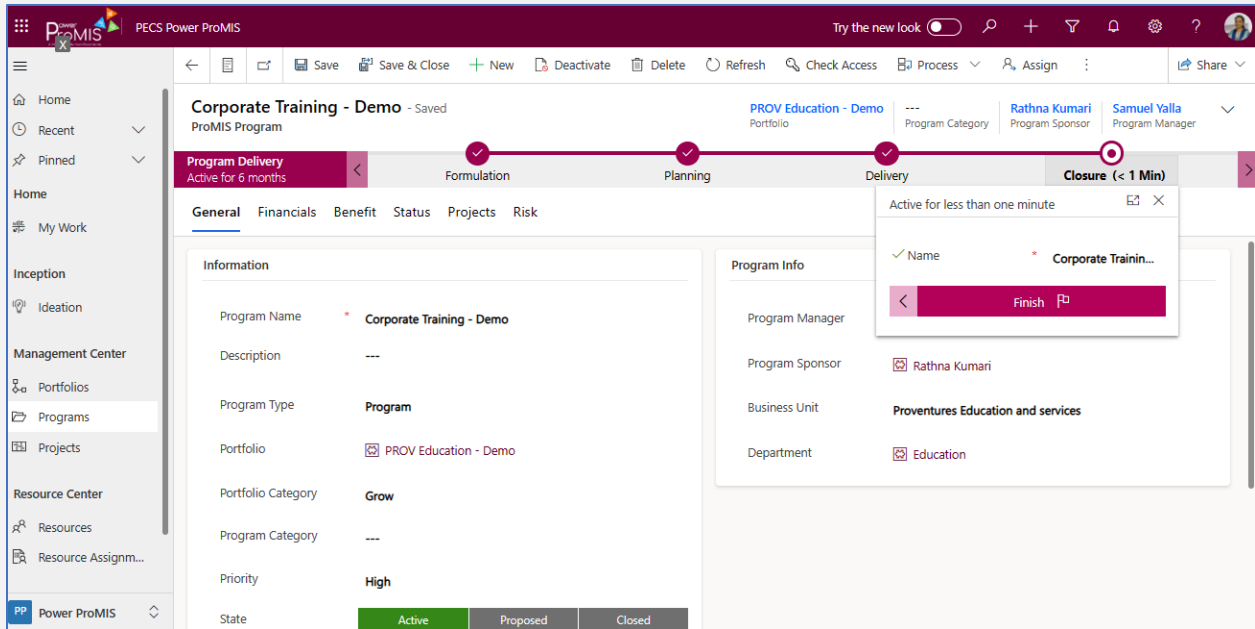
IDEATION

PROJECT REQUEST LIFE CYCLE

Submission	→	Analysis	→	Evaluation	→	Approval

IDEA SUBMISSION

Ideation: Ideation is the process of generating and collecting ideas and potential project concepts from various sources, team members, stakeholders. It's an essential step in project initiation and planning, where the primary objective is to identify potential projects that align with the organization's goals and objectives.

Figure1.1 -Ideation

Ideation benefits:

- Ideation helps identify and address problems by generating a wide range of potential solutions.
- Project teams can anticipate and mitigate potential risks and issues and reduce the risks associated with projects.
- Ideation promotes flexibility in project management. When teams are encouraged to generate and consider multiple ideas, they become more adaptable to changing circumstances.

How to use it:

Click on drop down and choose the option below.
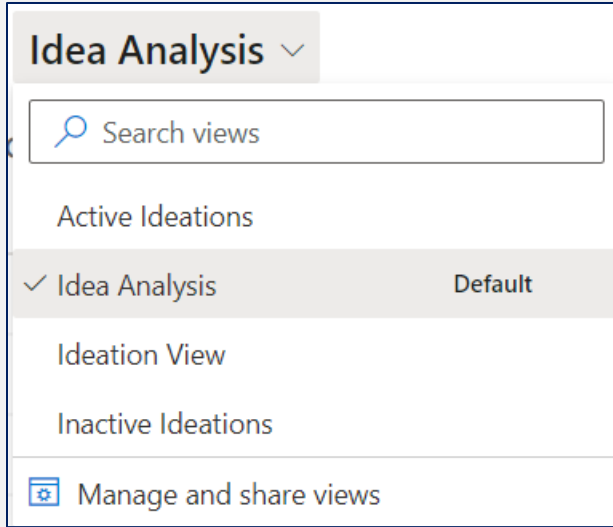
Idea submission: Idea submission is a process within organizations where individuals or teams propose new concepts, suggestions to address specific problems, capitalize on opportunities, or improve existing processes. The primary purpose of idea submission is to foster innovation, engage employees, and collect valuable inputs from various sources.

- Idea submission is a critical process because it encourages participation, creativity, and engagement among employees and stakeholders.
- Successful idea submission processes can lead to improved products, services, and operations.
- Idea submission begins with the generation of ideas. These ideas can originate from employees, customers, or stakeholders.
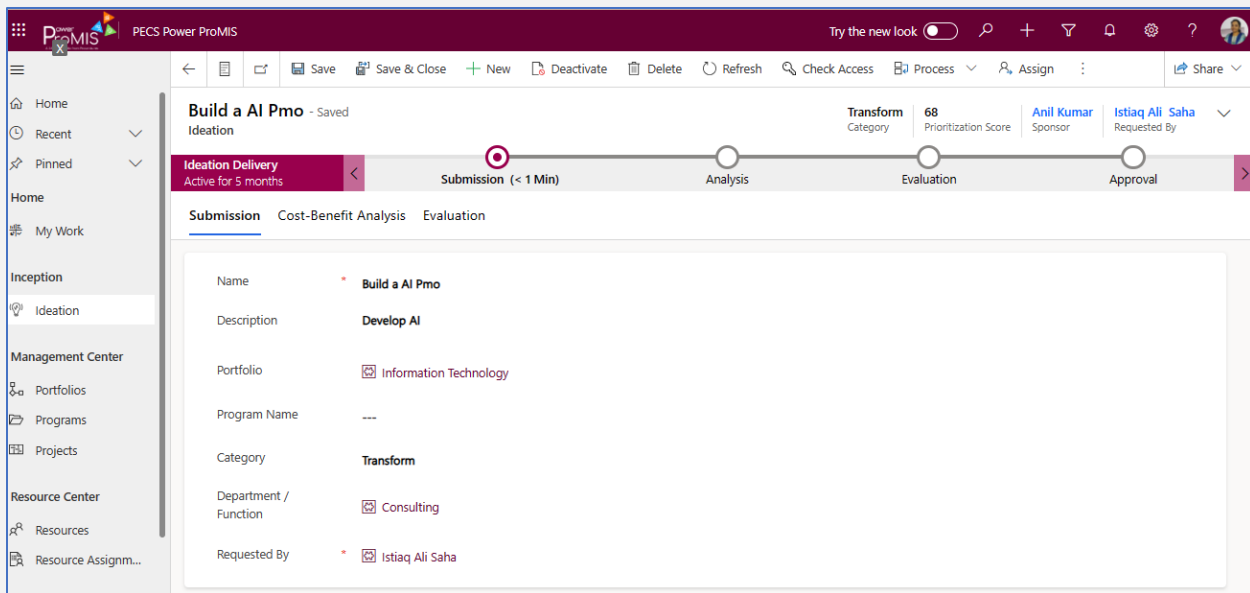

Figure: 1.2. Idea Submission

Field Name	Description
Name	Name of an idea
Description	Description of an idea
Portfolio	Name of Portfolio
Program Name	Name of Program
Category	**Transform**: In this initial phase, the organization focuses on generating new ideas and concepts. It involves brainstorming, creative thinking, and ideation. **Grow**: Once innovative ideas have been identified and developed in the transformation phase, the next step is to "grow" them. This phase involves taking those ideas and nurturing them to the point where they can be implemented on a larger scale. **Run**: The "run" phase is about executing and implementing the ideas that have been transformed and grown.
Department/ Function	Department Name
Benefit	Successful idea submission processes can lead to improved products, services, and operations.

IDEA ANALYSIS

Idea analysis refers to the process of evaluating and assessing project proposals or concepts before they are formally initiated into a project. This step is essential for selecting the most viable and valuable projects to pursue.

- The purpose of idea submission is to encourage the generation of potential project ideas.
- During idea submission, individuals or teams typically submit a written proposal or presentation outlining the project concept. This document may include a brief description of the project, its objectives, expected outcomes, potential benefits, and the problem it aims to solve.
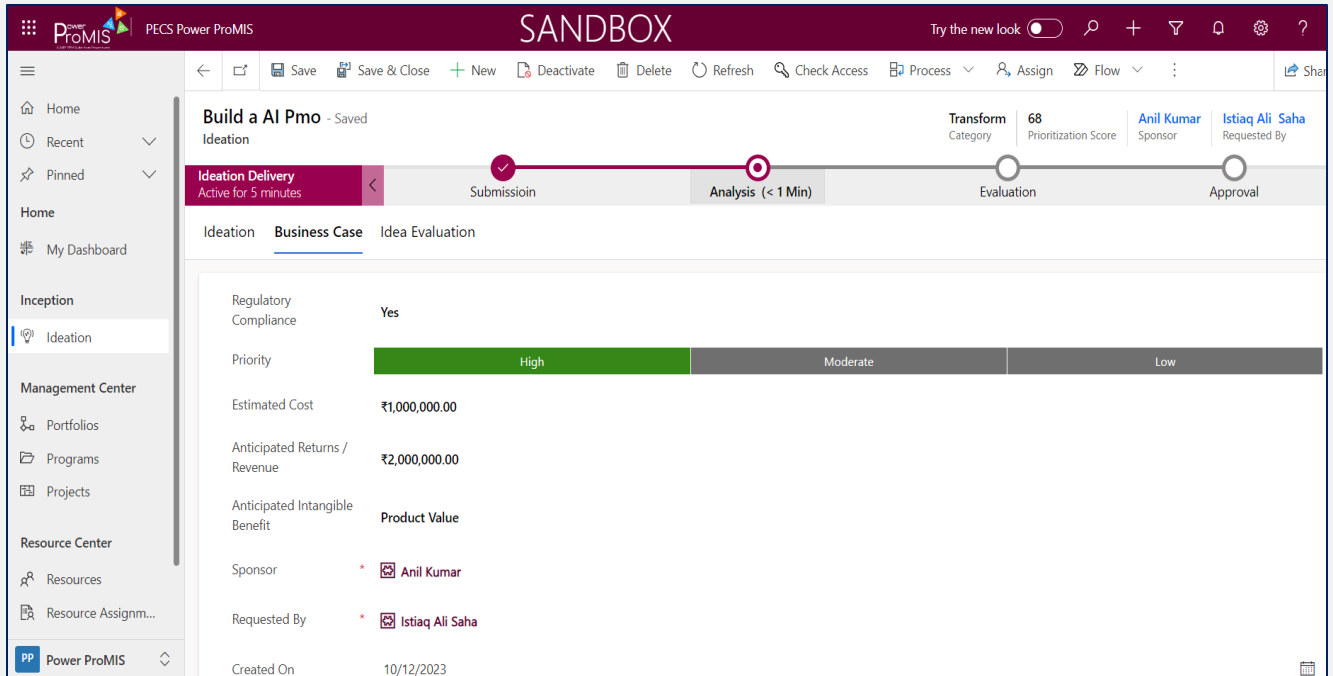
Figure: 1.3- Idea Analysis (Business case)

Business Case

Field Name	Description
Regulatory Compliance	Regulatory compliance refers to ensuring that a project's initial concepts and ideas consider and align with the relevant laws, regulations, and industry standards that apply to the project
Priority	It describes evaluating and ranking ideas based on specific criteria to determine which ones should be pursued, developed, or implemented first.
Estimated cost	Estimated cost for ideation
Anticipated returns/ Revenue	Anticipated returns for ideation
Anticipated Intangible Benefit	Anticipated intangible benefits are the good results or advantages that a project is expected to create, but these are things that are hard to measure in terms of money.
Sponsor	Name of Sponsor

Requested By	Requestor Name
Created On	Date of Creation

IDEA EVALUATION

Idea evaluation is where project proposals or concepts are systematically assessed to determine their viability, potential benefits, and alignment with organizational goals.

- The primary purpose of idea evaluation is to separate promising project proposals from those that are less viable.
- It aims to identify projects that are in alignment with the organization's strategic objectives and have the potential to deliver significant benefits.
- To evaluate project ideas effectively, organizations establish a set of evaluation criteria. These criteria can include factors like strategic alignment, feasibility, financial viability, potential return on investment (ROI), risks, and impact on existing operations.
- It involves a comprehensive analysis of each project idea, leading to informed decisions about project selection and prioritization.
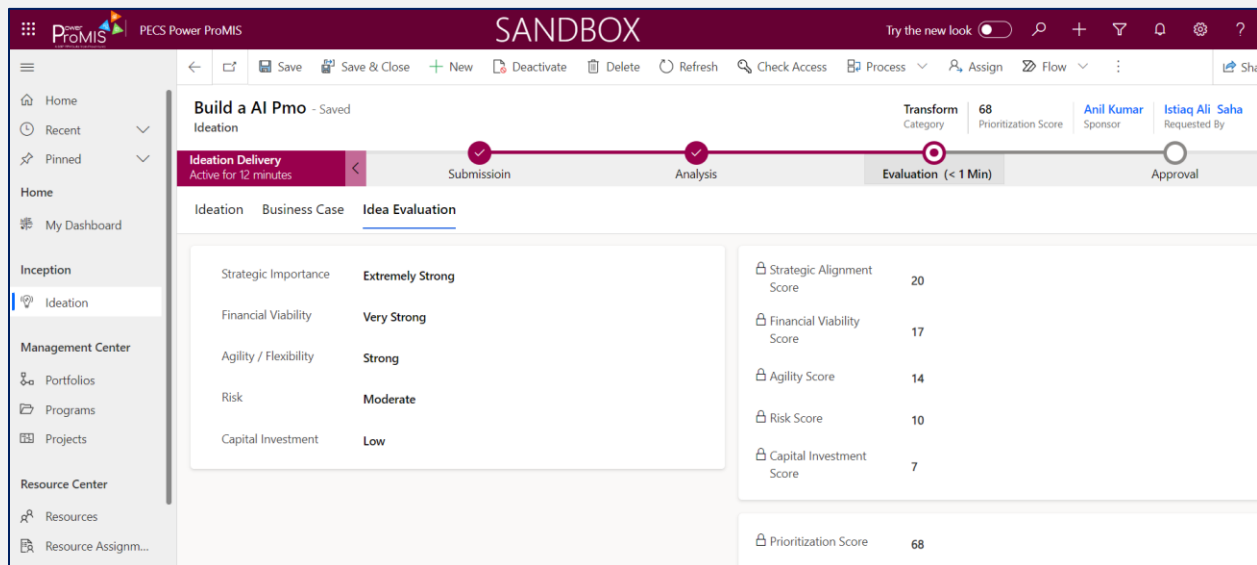

Figure: 1.4- Idea Evaluation

Fields	Description
Strategic Importance	The strategic importance is referring to the significance of the ideas and concepts generated during the ideation phase in aligning with an organization's overall strategic goals and objectives.
Financial viability	Financial viability in ideation involves assessing whether an idea is economically sustainable, considering costs, revenue potential, profitability, market demand, return on investment, budget constraints, and compliance with financial regulations.
Agility / Flexibility	Agility and flexibility in ideation mean being open to different ideas, quickly generating and refining concepts, adapting to change, and embracing feedback and learning. It enables organizations to respond to evolving conditions and create innovative solutions.
Risk	Risk refers to the potential challenges and uncertainties that can hinder the development of new ideas. These risks include idea rejection, lack of creativity, resource constraints, market viability, and more.
Capital Investment	Capital investment is the allocation of funds for long-term assets, such as equipment or buildings, with the expectation of generating returns over an extended period, and it plays a crucial role in a business's growth and development.
Strategic Alignment score	It is a calculated field
Financial viability score	It is a calculated field
Agility Score	It is a calculated field
Risk Score	It is a calculated field
Capital investment score	It is a calculated field
Prioritization score	It is a calculated field

IDEA APPROVAL & PROJECT CREATION

Idea approval is a formal and documented process. Once a project idea receives approval, it is often accompanied by the creation of a project charter or a similar document that outlines the project's scope, objectives, stakeholders, and initial plan.

- The approval decision is typically made by a group of individuals or a committee with the authority to make project-related decisions.
- A key consideration during the approval process is how well the project aligns with the organization's strategic goals.
- Idea approval is the formal approval of a project, indicating that it has met specific criteria and is in alignment with the organization's strategic objectives.
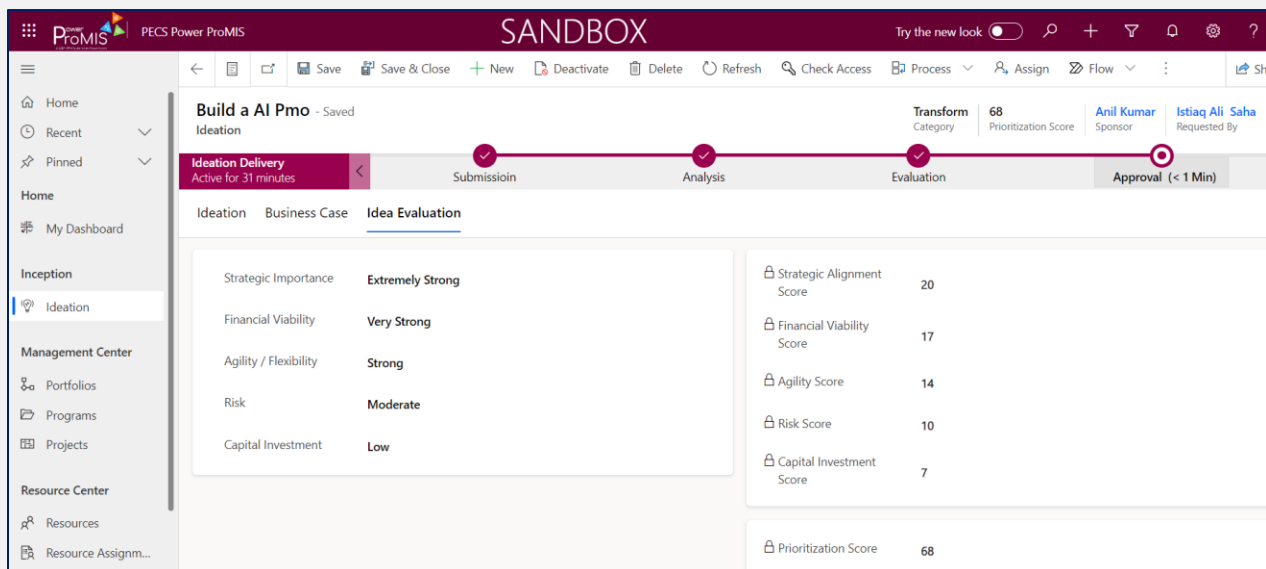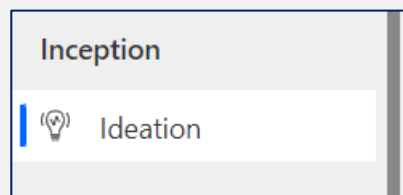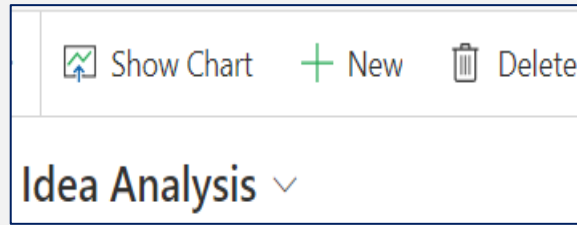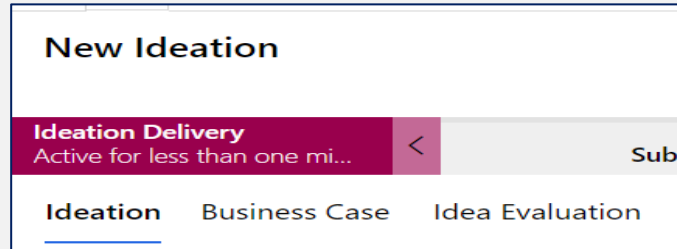

Figure: 1.5. Idea Approval

How to use it:

Step1: Click on Ideation

Step2: Click on new Idea.

Step3: New Ideation Page opens.


Step4: Fill the required fields.

PROJECT LIFE CYCLE

Proposed	→	Initiation	→	Planning	→	Execution	→	Closure
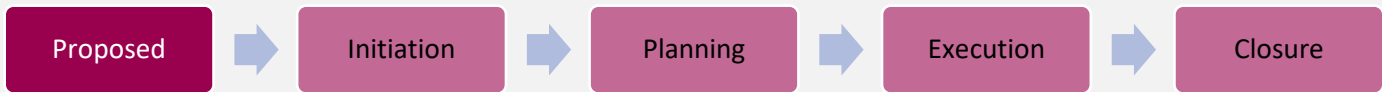
PROJECT CREATION (PROPOSED)

Description: In the Proposed phase (also called Project creation phase), a project is created in the system by providing high-level outcomes that a project aims to achieve and how it will be accomplished. It provides a roadmap for all the stakeholders that will be involved in a project.
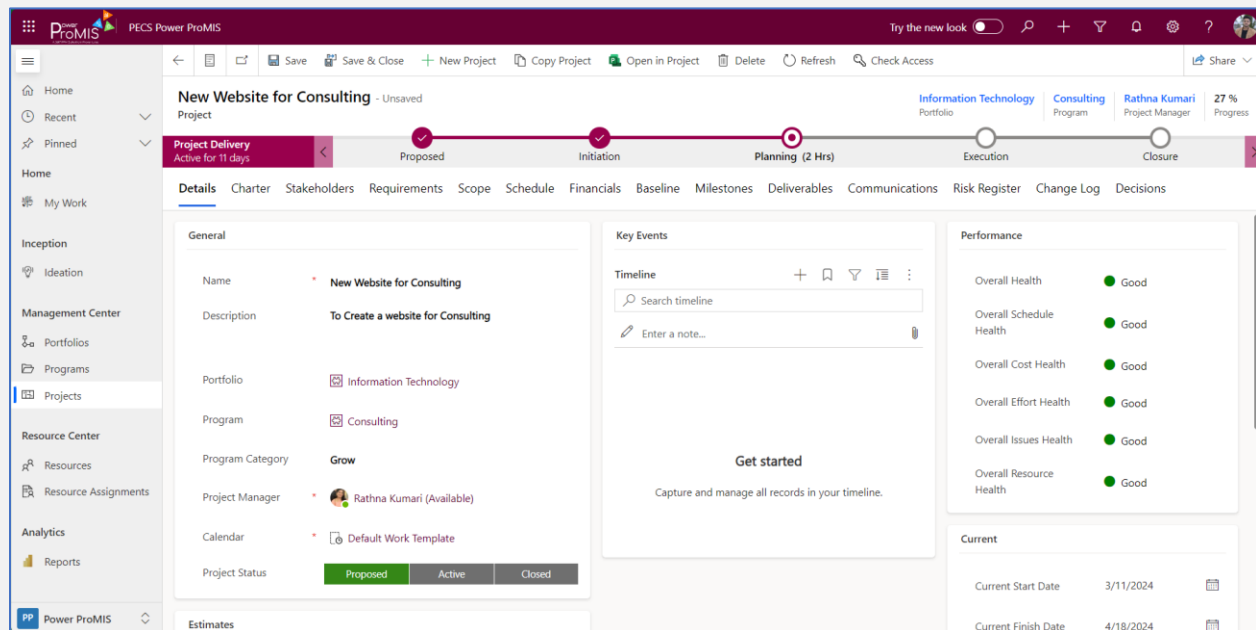
1.1. Project Proposed

PROJECT DETAILS: Project details tab provides specific information and elements that offer a comprehensive understanding of a project. It includes general information, estimates, timeline, actuals, and performance indicators.
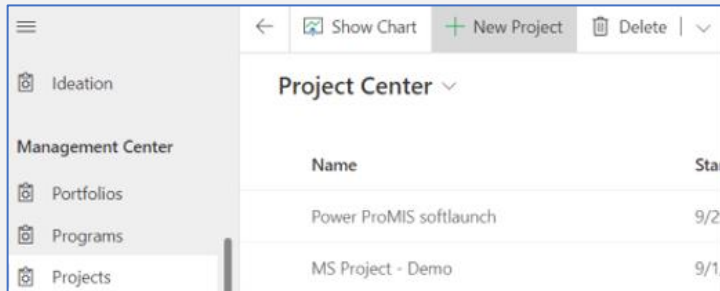
How to Use: Steps to create a new project
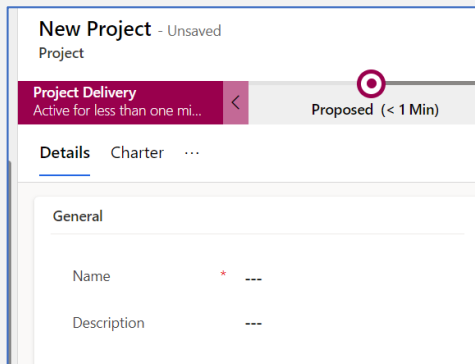
Step1: Click on Projects in the left Pane.

1.2   Project Center

Step2: Click on New Project

Step3: Click on project details.

Step 4: Enter new project details.

Enter Name, Description.

Select Portfolio, Program to be associated with the project.

Select Program Category (Run, Grow or Transform)

Select Project Manager

Select Calendar

Select Project Status (Proposed or Active)

* Marked fields are mandatory input fields

| Name	*	Power Promis
Description		---
Portfolio		Power Promis Training
Program		Power Promis Training
Program Category		---
Project Manager	*	Srinivas Pradeep (Away)
Calendar	*	Default Work Template
Project Status		Active

PROJECT EVALUATION

Purpose: The purpose of project evaluation is to assess progress, ensure accountability, and facilitate informed decision-making by identifying strengths, weaknesses, and opportunities for improvement. It serves to optimize resource allocation, foster learning, and enhance project outcomes through continuous monitoring and feedback.

Definition: Project evaluation is the systematic assessment of a project's progress, effectiveness, and outcomes against predetermined criteria or objectives. It involves gathering and analyzing data to determine whether the project is meeting its intended goals, staying within budget, and adhering to established timelines.

 Benefit of Project charter:

1. **Performance Improvement:** Identifies areas for enhancement, leading to increased efficiency and effectiveness.
2. **Accountability:** Ensures stakeholders are responsible for their roles and resources are utilized optimally.
3. **Informed Decision-Making:** Provides insights for informed decisions, maximizing project success and impact.
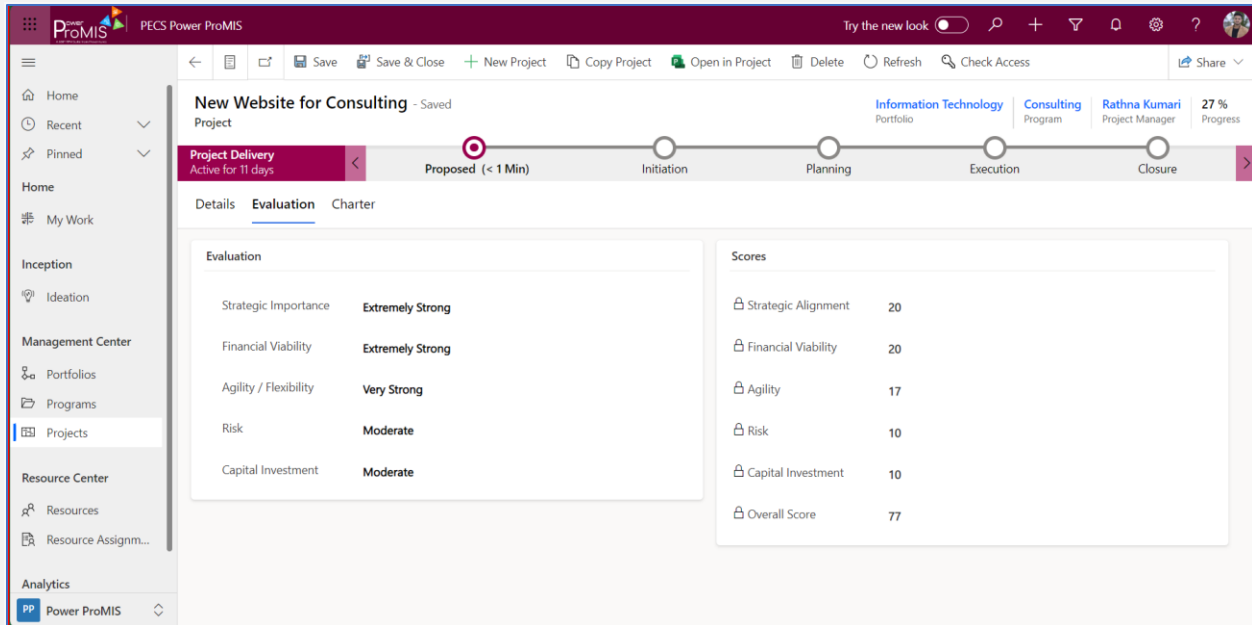
1.2 Project Evaluation

Field Description:

| Field Name	Description
Strategic Importance	This field refers strategically aligns project outcomes with organizational goals, optimizing resource allocation and fostering continuous improvement for long-term success.
Financial Viability	Financial viability assesses whether a project or business can generate sufficient returns to cover costs and remain economically sustainable
Agility/Flexibility	Agility and flexibility refer to the ability of a project or organization to quickly adapt to changing circumstances, requirements, or opportunities.
Risk	Risk refers to the potential for uncertain events or circumstances to have negative impacts on a project, organization, or objective, and it encompasses both threats and opportunities.
Capital Investment	Capital investment involves allocating funds into long-term assets with the aim of generating future returns.

How to use it: To create a Evaluation

Step1: Click on project center.
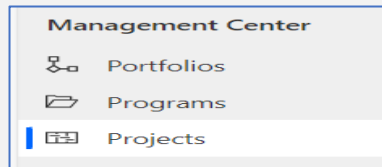
Management Center
- Portfolios
- Programs
- **Projects**

Step2: Select project.

Name	Start Date	Planned Finish Date
Power ProMIS softlaunch	9/29/2023	9/29/2023 10:22 AM
MS Project - Demo	9/1/2023	9/11/2023 10:45 AM
SLIC Test Idea	9/4/2023	9/4/2023 6:50 AM
Hindalco - Greenbelt Project - Demo Prep	9/1/2023	9/1/2023 5:00 PM
Softlaunch 2	9/29/2023	
Construction of a Corporate Hospital	10/1/2023	1/17/2025 5:00 PM

Step3: Click on Evaluation.

Project Delivery
Active for 11 days

Proposed (< 1 Min)

Details   **Evaluation**   Charter
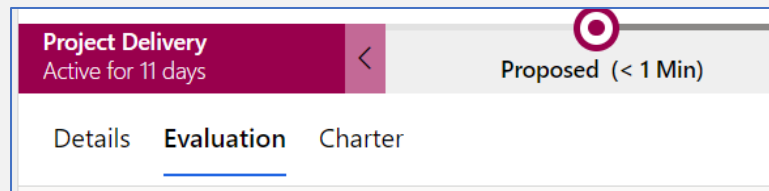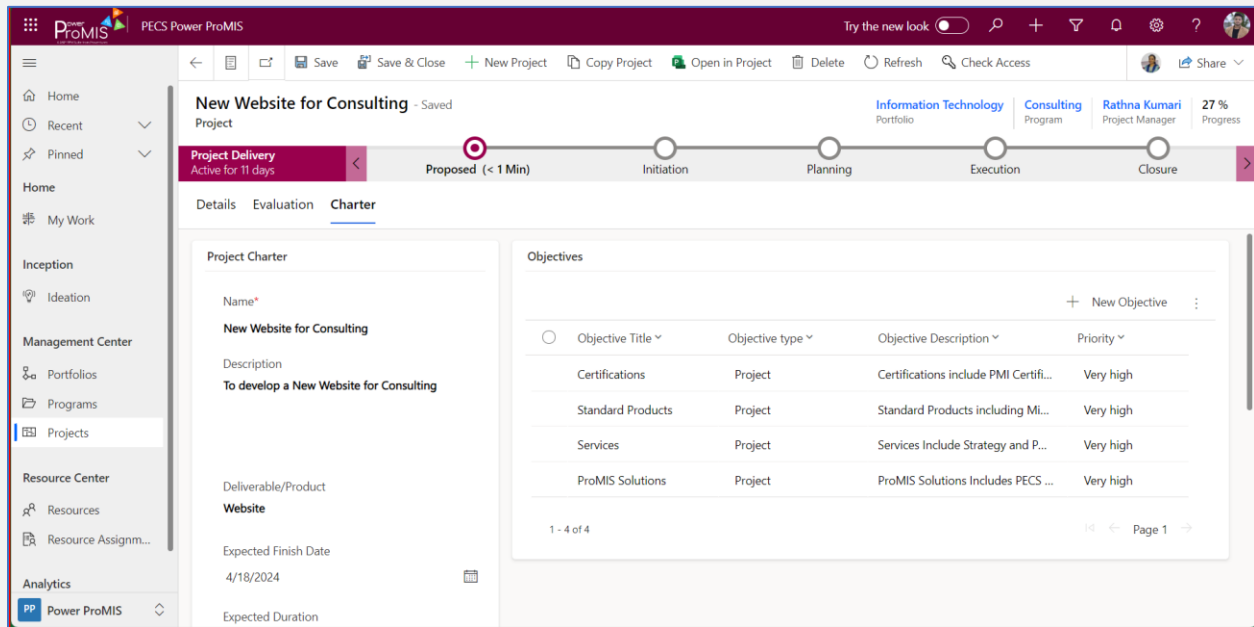

PROJECT CHARTER

Purpose: The purpose of a project charter is to define the project by outlining its objectives, high-level scope, schedule and providing high level information to guide the project's initiation and management.

Definition: A document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities.

Benefit of Project charter:

- Authorizes the project to start.
- Lists the high-level project requirements.
- Creates a shared understanding of the W5+.
- Identifies stakeholders.

- Describes how the project links to ongoing work and aligns with the organization's mission and goals.
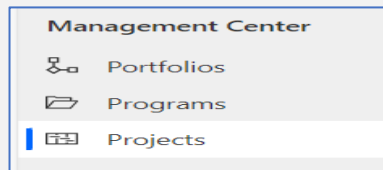

1.3 Project charter

Field Description:

Field Name	Description
Objective description	Objective description refers to a clear statement that outlines the primary purpose, goals, and objectives of the project.
Priority (Low /Medium/ High/ Very High)	Priorities help stakeholders to understand which aspects of the project are most important and guide decision-making throughout the project lifecycle. Factors to be considered for prioritization:
Objective type	Objective type describes categorizations of the various goals and outcomes that the project aims to achieve. There are 3 types. 1. Business objective: A business objective is a specific and measurable goal that an organization aims to achieve to advance its mission and strategy. 2. Project objective: A project objective is a clear, measurable goal that a project aims to achieve within a defined scope, time frame, and budget.

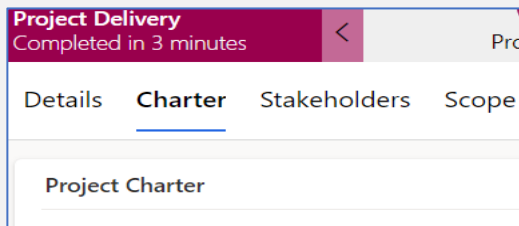|	
	3. Stakeholder objective: Stakeholder objectives are the specific goals that individuals, groups, or organizations involved in a project have and aims to achieve through their participation in that project.
Objective status	The objective status refers to the current condition or progress of the project's objectives.

How to use it: To create a Project Charter

Step1: Click on project center.

Step2: Select project.

Step3: Click on project charter.

The Project Description, Portfolio and Program will be auto populated.

Step 4: Click on new objective.
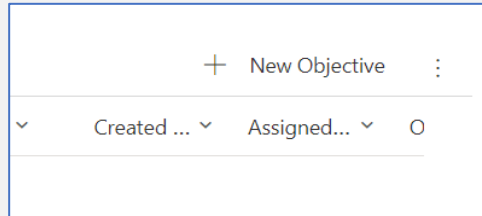
Step 5: Quick create form will open.

Quick Create: Objective

Objective Title	---
Objective Description	---
Created on	---
Priority	---

Objective Details

Objective type	Business	Project	Stakeh...
Objective status	Realized	Pending	Other
Assigned to	---
Owner	* Sirisha Paramkusham (Do not disturb)

Step 6: Fill in the required fields for the Project Charter.

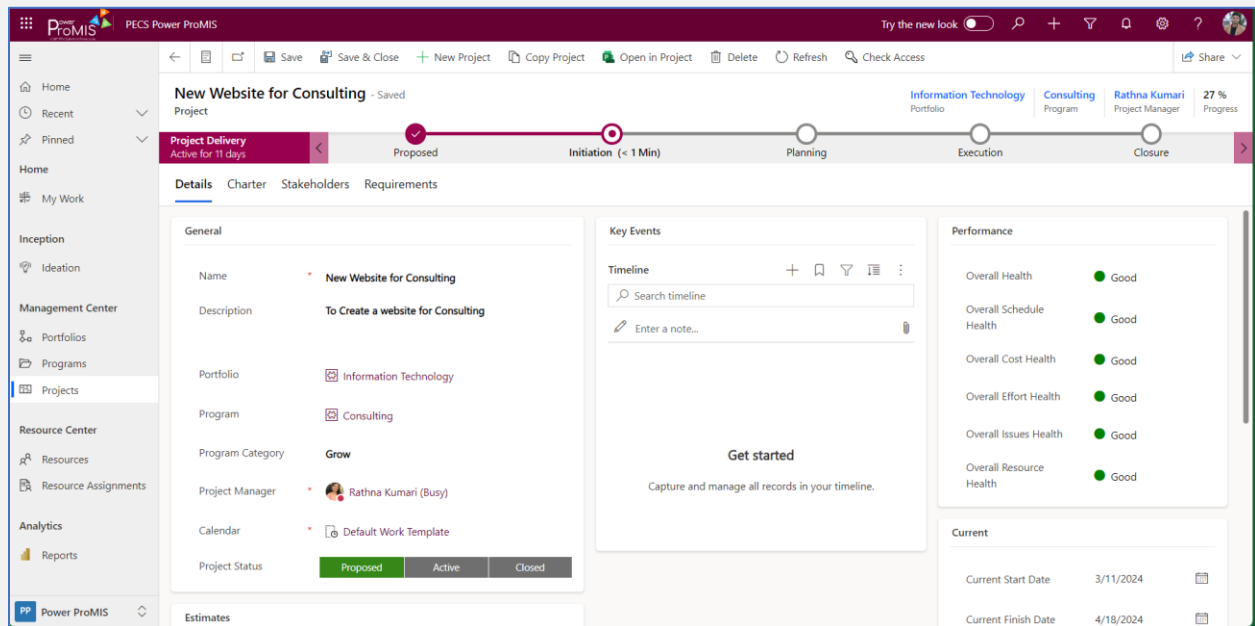## PROJECT INITIATION

Description of Project Initiation Phase: Project initiation is the first phase of a project's lifecycle, and it is a critical step in setting the stage for a successful project. During this phase, the primary goal is to define the project, its objectives, scope, stakeholders, and the overall strategy.

1.4 Project Initiation

STAKEHOLDER

Purpose: The purpose of the stakeholder register is to identify, analyze, and manage all stakeholders based on their level of interest and impact on a project.

Definition: Stakeholder register is a project management document that identifies and categorizes individual or group of stakeholders with an interest and impact on a project, while also providing key information for effective engagement and management.

Benefit of Stakeholder Register:

The key benefits of stakeholder Register are:

- Identification of stakeholders.
- Effective communication between stakeholders.
- Identifying and managing risks.
- Enhances the project success.
- Provides information about roles and responsibilities of stakeholder.
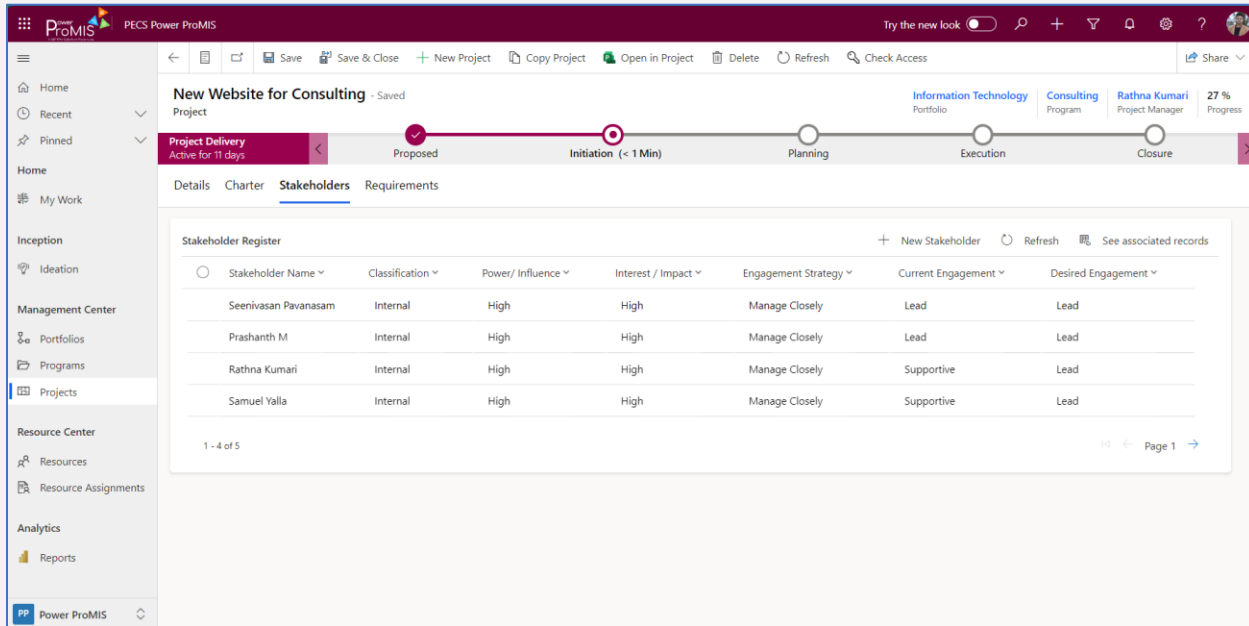
1.5 Stakeholder Register

How to use it:

Step1: Click on project center.
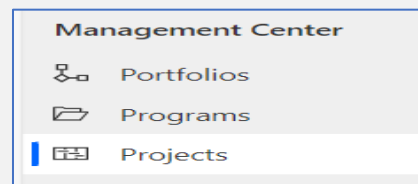
Step2: Select project.

Step3: Click on stakeholder register.

Step4: Click on new stakeholder.

Step5: Quick create form will open.

Step 6: Fill in the required fields.

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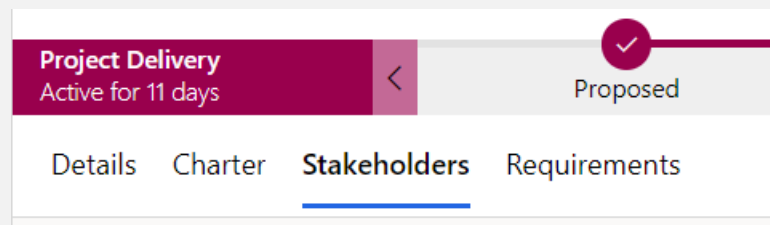| Field Name	Description
Stakeholder Name	Name of stakeholder
Classification	Stakeholders can be categorized based on their level of involvement in the project. There are 2 types of stakeholders. 1. Internal Stakeholders 2. External Stakeholders Internal stakeholders: Internal stakeholders are individuals or groups within an organization who have a direct interest or involvement in the project. External Stakeholders: External stakeholders are individuals, groups outside of an organization who have an interest or influence in the organization's activities, decisions, and project outcomes.
Power/ Influence (Low/ Medium / High)	Assess and categorize each stakeholder's level of power/ influence in the project.
Interest/ Impact (Low/ Medium / High)	Assess and categorize each stakeholder's level of interest in the project.
Engagement Strategy 	Engagement strategy describes the involvement of each project stakeholder based on needs, expectations, interests, and potential impact on the project. 1. Keep Satisfied: High power and low interest. 2. Manage Closely: High power and High Interest. 3. Monitor: Low power and Low Interest. 4. Keep Informed: Low power and High interest.
Current engagement	It describes the current level of interaction and involvement in project related activities of a particular stakeholder.
Desired engagement	It describes the desired level of interaction and involvement in project-related activities of a particular stakeholder. The levels of stakeholder engagements are unaware, resistant, neutral, supportive, leading.
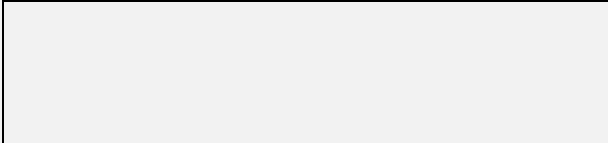
	Develop strategies to move them towards the desired level of engagement for the project's success.

REQUIREMENTS

Purpose: The purpose of requirements is to define the necessary criteria, functionalities, and features that a product, project must meet to fulfill stakeholder needs, guide development efforts, and ensure successful outcomes.

Definition: A requirement is a documented need or condition that must be fulfilled or satisfied by a product or project to achieve its objectives to meet stakeholder expectations.

Benefit of Requirements:

1. **Clarity:** Provides clear and concise guidelines for project goals and expectations.
2. **Alignment:** Ensures all stakeholders are on the same page regarding project objectives.
3. **Efficiency**: Streamlines development efforts by providing a structured roadmap.
4. **Risk Management:** Identifies potential risks early and enables proactive mitigation strategies.
5. **Change Control:** Establishes a baseline for managing changes throughout the project.
6. **Quality Assurance:** Serves as a basis for testing and validation, ensuring high-quality outcomes.

1.6 Requirement

How to use it:

Step1: Click on project center.
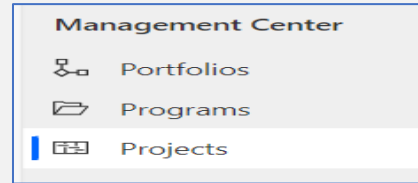
Step2: Select project.

Name	Start Date	Planned Finish Date
Power ProMIS softlaunch	9/29/2023	9/29/2023 10:22 AM
MS Project - Demo	9/1/2023	9/11/2023 10:45 AM
SLIC Test Idea	9/4/2023	9/4/2023 6:50 AM
Hindalco - Greenbelt Project - Demo Prep	9/1/2023	9/1/2023 5:00 PM
Softlaunch 2	9/29/2023	
Construction of a Corporate Hospital	10/1/2023	1/17/2025 5:00 PM

Step3: Click on Requirement.
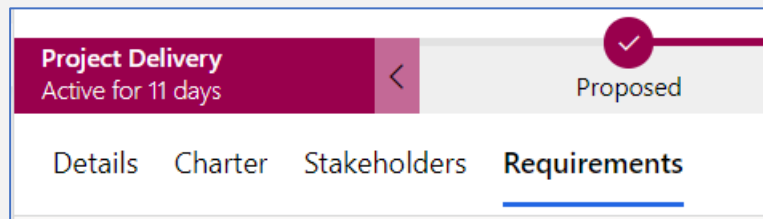
Step4: Click on new Requirements.
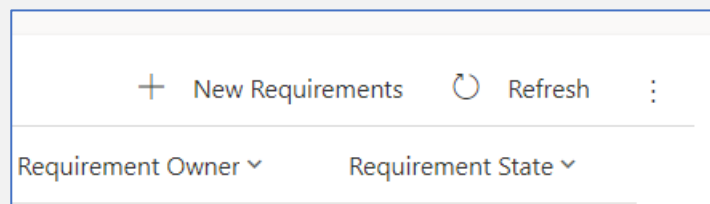
Step5: Quick create form will open.

Quick Create: Requirements   ✕

Requirement Details

Requirement Name	*	---
Requirement Description		---
Requirement Origin		---
Requirement Type		---
Acceptance Criteria		---
Requirement Owner	*	Istiaq Ali Saha (Do not disturb)
Requirement State		---

Save and Close ⌄   Cancel

Step 6: Fill in the required fields.

Field Name	Description
Requirement Name	Name of Requirement
Requirement Description	A requirement description in a project outlines the specific functionalities, features, constraints, and conditions that must be met by the project deliverables to satisfy the needs and expectations of stakeholders.
Requirement Origin	"Requirement origin" typically refers to the source or origin of a requirement within a project or system
Requirement Type	"requirement type" refers to the categorization or classification of requirements based on their characteristics or nature within a project
Acceptance Criteria	Acceptance criteria in a project refer to specific conditions or criteria that a product, service, or deliverable must meet to be accepted by the customer, stakeholder, or end user.
Requirement Owner	A requirement owner in a project is typically an individual or a group responsible for managing and prioritizing the requirements for the project.
Requirement State	Requirement state refers to the set of conditions or criteria that must be satisfied for a particular requirement to be considered complete or fulfilled.

PROJECT PLANNING

Project planning is a comprehensive and systematic process that entails defining the objectives, scope, and deliverables of a project, along with identifying and allocating resources, setting timelines, and establishing strategies for risk management and quality assurance. It involves breaking down the project into manageable tasks, sequencing them logically, estimating their durations and costs, and creating a detailed project schedule and budget. Furthermore, project planning encompasses stakeholder identification and communication planning to ensure alignment and engagement. By providing a structured roadmap, project planning lays the foundation for successful project execution, monitoring, and control, enabling organizations to achieve their goals efficiently and effectively while minimizing risks and optimizing resource utilization.
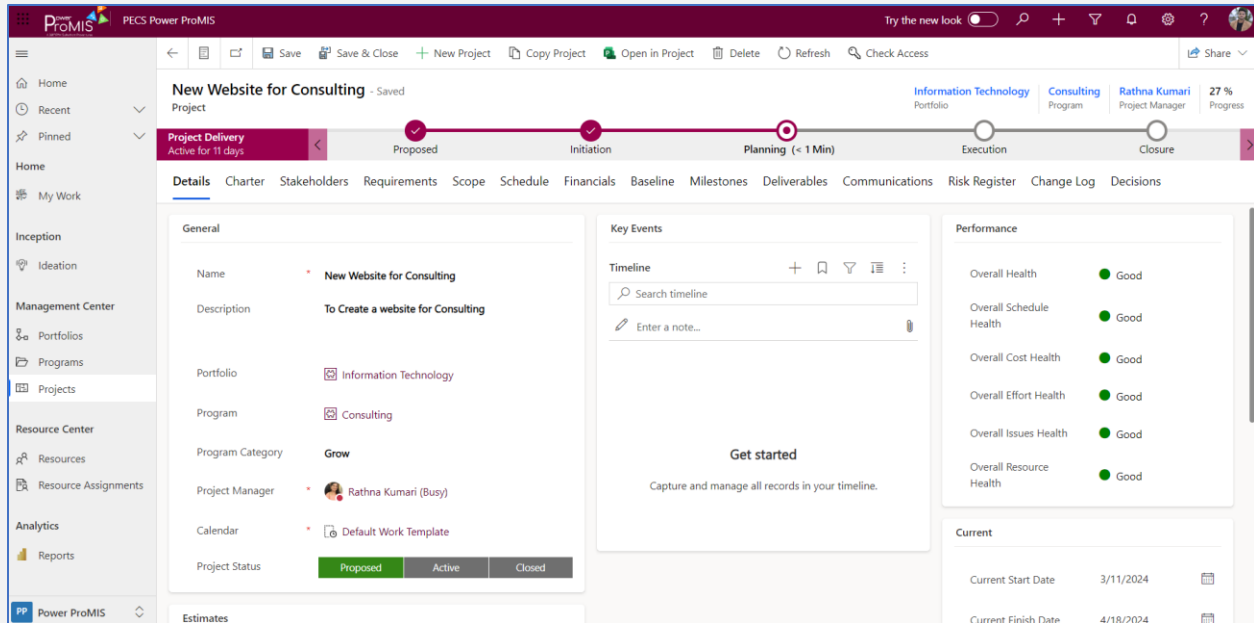
Figure 1.7 Project Planning

SCOPE

Purpose: In project management, the project scope defines the boundaries, objectives, deliverables, and constraints of a project. Its purpose is to clearly outline what the project will accomplish and what it will not. This helps in preventing scope creep (uncontrolled changes or additions to the project) and ensures that the project stays on track.

Definition: Scope is a critical aspect of project planning, and it defines the boundaries and objectives of a project. Properly defining the scope is essential for project success because it helps in setting expectations, managing resources, and ensuring that the project stays on track.

Benefits:

Defining and managing the scope of a project offers numerous benefits throughout the project lifecycle.

1. A well-defined scope provides a clear and concise statement of the project's objectives and what needs to be achieved.
2. With a clear scope, project managers can develop accurate project plans, including schedules, resource allocation, and budgeting.
3. Scope definition helps in identifying the resources (personnel, equipment, materials) required for the project.
4. A well-defined scope allows for better identification and management of project risks. By knowing the project boundaries, teams can focus on potential risks within those boundaries.

5. Scope definition serves as a reference point for managing change requests. It helps evaluate whether requested changes are within the project's original scope or require additional approval.
6. Scope definition includes the quality standards and requirements for project deliverables. This ensures that the project maintains the desired level of quality.
7. improved project planning, reduced risks, better resource management, enhanced communication, and greater control over project outcomes. It contributes to the overall success of a project by ensuring that it stays on track and delivers the intended results within the agreed-upon constraints.

Figure 1.8 Scope

Scope Statement:

Scope Statement

Product Description	Implemented MVP solution Training of the end users
Project Description	Feasibility, Acquire and configur user licences, Customization, Implementation, Training and Project Migration
Project Exclusions	Custom development Migrating past, completed projects
Acceptance Criteria	5 Key Projects moved in to the new system,

Product Description: A product description is a detailed explanation of a product's features, specifications, benefits, and other relevant information.

Project Description: The project description outlines the project's purpose, objectives, scope, deliverables, stakeholders, schedule, budget, and other essential elements.

Project exclusions: Project exclusions, often documented in a project's scope statement or project charter, outline the specific boundaries and limitations of the project. They identify what is explicitly excluded from the project's scope and objectives.

Acceptance criteria: specific conditions and criteria that must be met for a deliverable or feature to be considered complete and accepted by the stakeholders.

Assumptions Log   + New Assumptions

○	Assumption Na... ∨	Descripti... ∨	Category ∨	Owner ∨	Created ... ∨	Rating ∨	Next Review Da... ∨	S
	Receipt of PO be...		Project	Seenivas...	8/22/2023...	Uncert...		

1 - 1 of 1 |◁ ← Page 1 →

Field name	Description
Assumption Name:	Name of the assumption.
Description:	Description of the assumption.
Category:	Category of the assumption that is comes under (project, Product, Resource, Vender….)
Rating:	Rating given to the assumption according to the certainty.
Status:	Assumption status to be given whether it is active or inactive.
Status Reason:	If it is active or inactive reason should be given according to the status.

Field Name	Description
Constraints Name	Name of the factor that can affect project planning and execution.
Description	Description of the constraint.
Due date	The "due date" in the context of project constraints is used to specify or document the date by which a particular constraint or project requirement must be met or satisfied.
Resolution Date	A particular constraint is expected to be resolved, mitigated, or no longer applicable.
Status	Constraint status to be given whether it is active or inactive.
Status Reason	If it is active or inactive, a reason should be given according to the status.

Quick Create: Assumptions

Assumption Name	---
Description	---
Category	---
Owner *	Pragna Pamidimalla (Away)
Rating	---
Next Review Date	---
Status Reason	Active
Project Name	Power ProMIS softlaunch

Save and Close | ∨   Cancel

Quick Create: Constraints

Constraint Name	---
Description	---
Due Date	---
Owner *	Pragna Pamidimalla (Away)
Resolution Date	---
Status Reason	Active

Save and Close | ∨   Cancel

How to use: Scope is a part of project planning, so we need to fill all the details of scope. We need to fill the scope statement as well as assumptions and constraints log.

Note: To give the details of assumptions and constraints we need to click on New Assumption and New constraints then only we can see quick create forms. Then we need to give all the details on the form.

SCHEDULE

Purpose: The purpose of a project schedule is to facilitate effective planning, execution, and control of a project by managing time, resources, and tasks.

Definition: A project schedule is a documented, time-based plan that specifies the start and finish dates of project activities, the dependencies between these activities, the resources assigned to each activity, and any constraints or milestones that must be met. It provides a roadmap for the project team, stakeholders, and management, enabling them to understand the project's timeline, allocate resources efficiently, identify critical path activities, and monitor progress throughout the project's lifecycle.

Benefits: Time Management: A schedule helps teams manage time effectively by providing a clear timeline for when tasks and activities should start and finish. This prevents wasted time and ensures that work progresses efficiently.

1. Schedules provide a structured timeline for project activities, helping teams allocate time effectively and ensure that tasks are completed on schedule.

2. Schedules define the order and dependencies of project tasks, ensuring that activities are executed in the correct sequence to minimize delays and bottlenecks.

3. Schedules help project managers allocate resources, including personnel, equipment, and materials, efficiently to meet project deadlines.

4. Schedules set clear expectations for project timelines, allowing stakeholders to understand when key deliverables will be completed.

5. Schedules serve as a baseline for tracking progress, enabling project managers to compare planned progress to actual progress and take corrective actions as needed.

6. Schedules help identify and manage project risks related to time delays or resource constraints, allowing for proactive risk mitigation.

7. Schedules provide a mechanism for setting and adhering to project deadlines, improving the likelihood of on-time project completion.

8. Efficient scheduling can reduce project duration, save costs, and optimize resource utilization, contributing to project efficiency.

Schedules are essential tools in project management that contribute to better planning, execution, monitoring, and control of projects. They help project teams stay organized, meet deadlines, and deliver successful outcomes.
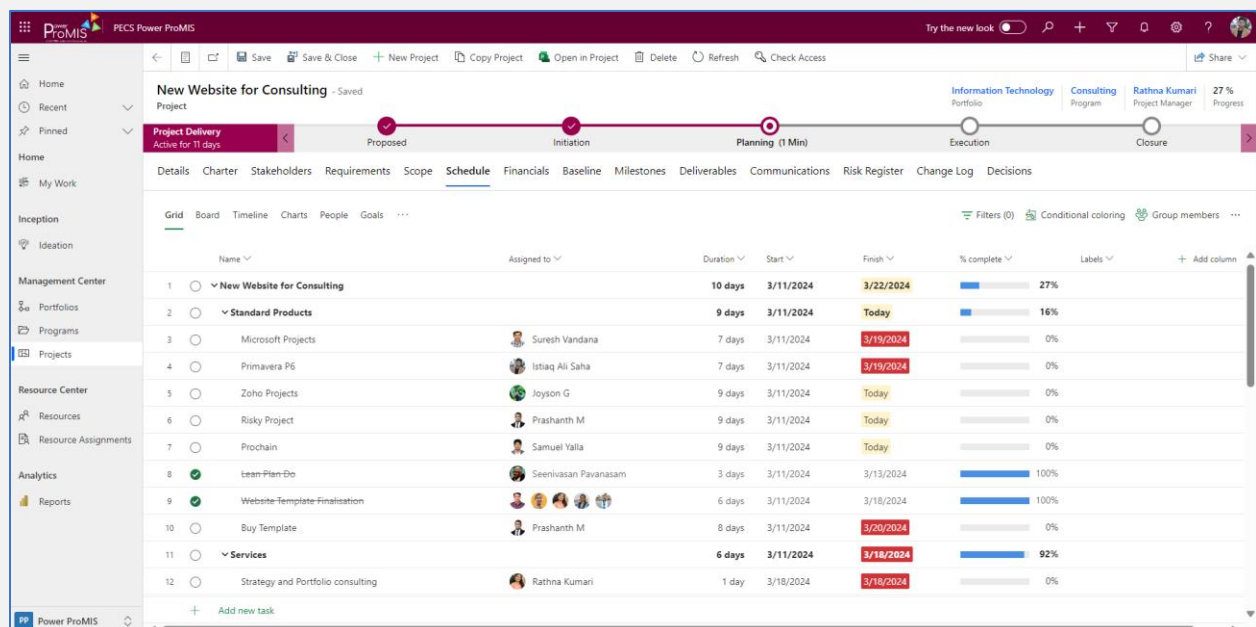
Figure 1.9 Schedule

Field Name	Description
Name	Activity name
Assigned To	Work that is assigned to the resource. (Name of the resource working on a particular task.)
Duration	The amount of time it takes to complete a specific task, activity, or phase within a project schedule.
Effort Remaining	The estimated amount of work or effort that still needs to be completed to finish a specific task, activity, or phase in the project.
Depends on	Logical relationship between tasks or activities within a project. Dependencies describe the sequence in which tasks must be executed or the conditions that must be met for one task to start or finish before another can begin.
%Complete	A metric used to measure and represent the progress made on a task, activity, or project.
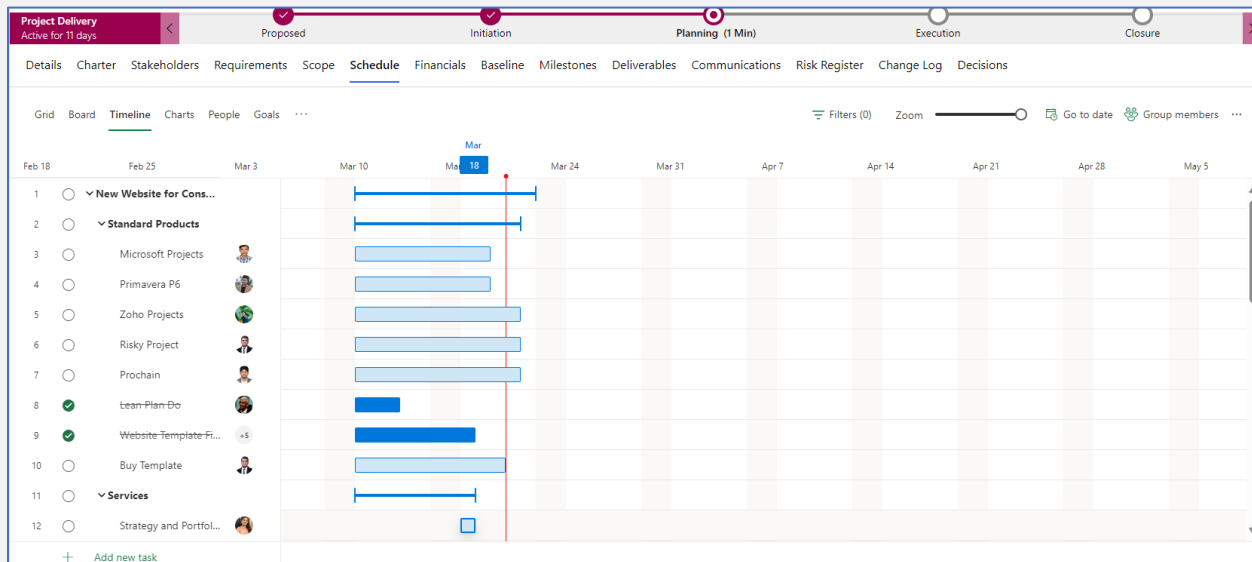
1.10 Schedule timeline

How to use: Schedule consists of list of activities, deliverables and milestones within a project. a planned start, finish date, duration and resources are assigned to each activity.

FINANCIALS

Purpose: Financials in project management refer to the financial aspects and considerations associated with planning, executing, and controlling a project.

Definition: The amount of funds allotted for a project is called project financials. In other words, the total amount of funds you can use to successfully deliver your project is referred to as project financials.

Benefits: Financial management is a crucial aspect of project management, and there are several benefits associated with effectively managing financials in projects:

1. **Resource Allocation**: Financial management helps organizations allocate their resources (e.g., funds, personnel, materials) efficiently and effectively to meet strategic goals and objectives.
2. **Budgeting and Planning**: Financial planning and budgeting enable organizations to set clear financial objectives, allocate funds accordingly, and plan for future expenses, projects, and growth initiatives.
3. **Cost Control**: Financial management helps control and minimize costs by identifying areas where expenses can be reduced or eliminated.
4. **Risk Management**: Financial analysis and reporting allow organizations to identify financial risks and develop strategies to mitigate them. This includes managing cash flow, debt, and financial contingencies.

Effective financial management is a fundamental aspect of organizational success. It supports decision-making, resource allocation, risk management, and the achievement of strategic objectives. By maintaining healthy finances, organizations are better equipped to adapt, grow, and thrive in a dynamic business environment.
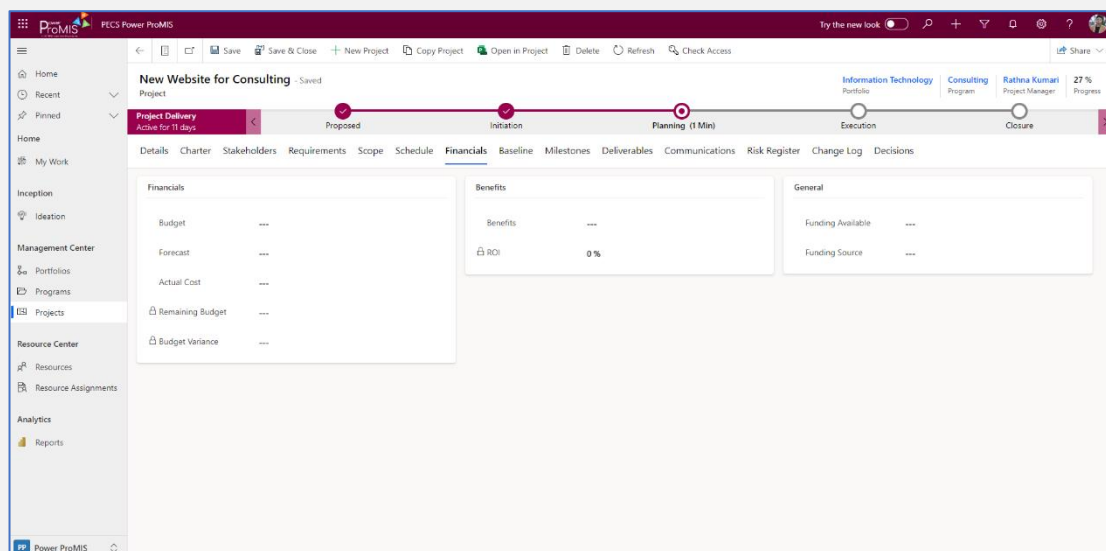
Figure 1.11 Financial

Field Name	Description
Financials	Financial considerations should be integrated into the overall project management process to achieve project objectives and meet organizational goals**.
Budget	A "budget" is a financial plan that outlines the estimated costs required to complete a specific project.
Forecast	Prediction or estimate of future financial performance based on historical data, current trends, and assumptions.
Actual Cost	The real, incurred expenses associated with a project, operation, or any financial activity.
Remaining Budget	A portion of a budget that has not yet been spent or allocated for specific expenses or projects.
Budget variance	The difference between the actual financial performance and the budgeted or planned financial performance for a specific period.
Benefits	Financial Benefit – Profit Amount
ROI%	Percentage of return on investment.
Funding Available	Available funds to be spent on the project.
Funding Source	Should be given as internal/external.

How to use: Financial management is a critical aspect of project management, as it helps ensure that a project is completed within its budget and financial constraints. It includes budget development, cost estimation, resource allocation, cost control, cash flow, financial forecasting and financial reporting.

MILESTONES

Purpose: Milestones in a project serve as critical checkpoints and reference points for measuring progress, managing risks, ensuring alignment with goals, and facilitating effective communication. They play a fundamental role in project planning and control, helping to ensure that the project is completed successfully and within the established constraints of time, budget, and scope.

Definition: A milestone in project management is a predefined, specific event, deliverable, or accomplishment that represents a critical point in a project's timeline or development. Milestones are used to track progress, measure project performance, and provide clear reference points for assessing whether the project is on track to meet its objectives.

Benefits: milestones provide structure, measurement, and accountability in project management, offering numerous benefits that contribute to project success, effective communication, and efficient resource management. They are essential tools for managing and delivering projects on time, within budget, and to the desired quality standards.
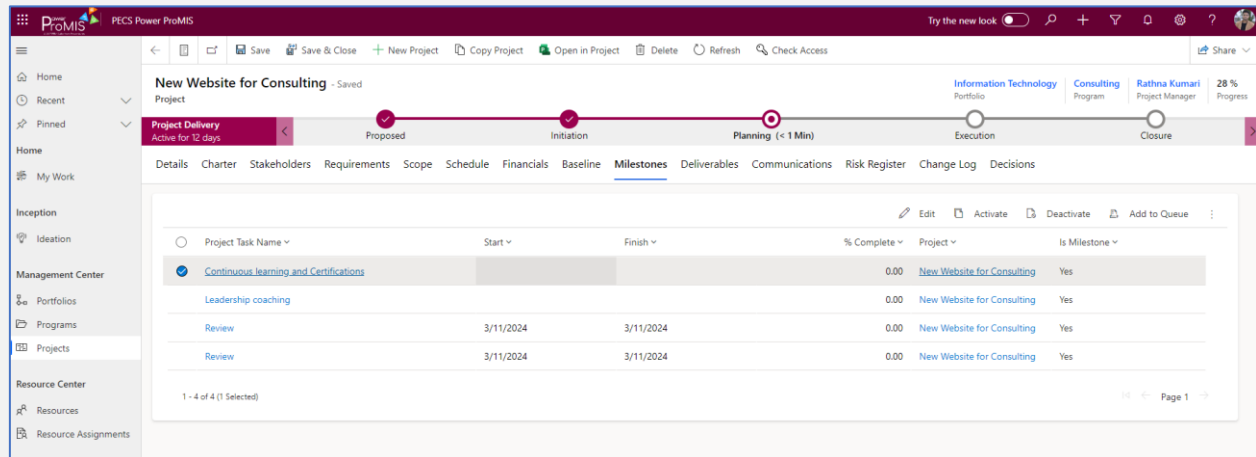
Figure 1.3 Milestones

Field name	Description
Project task name	Name of the task which is considered as milestone.
%Complete	Percentage of completion of a task.
Project	States that the name of a project milestone belongs to.

How to use: Milestone list is visible in the milestone tab so that we can see every project milestone here. Milestone lists provide a structured approach to project tracking and help ensure that a project stay aligned with its goals and objectives.

BASELINE

Purpose: In project management, a baseline serves as a fundamental reference point and a critical tool for managing and controlling a project. The primary purpose of establishing a baseline is to provide a stable and consistent framework for measuring, monitoring, and comparing project performance over time.

Definition: a baseline refers to a specific and predefined set of project information or data that serves as the foundation or reference point for measuring and comparing the project's actual performance and progress. Baselines are established during the project planning phase and are used to assess whether the project is proceeding according to its original plan.

Benefit: A baseline is a reference point that represents the initial project plan, including key parameters such as scope, schedule, and budget.

1. **Performance Measurement**: A baseline serves as a benchmark against which project performance can be measured.
2. **Scope Management**: With a baseline, the project's scope is well-defined and documented. Any changes to the scope can be measured against the baseline, making it easier to manage scope creep and ensure that changes are properly evaluated and approved.
3. **Schedule Control**: The baseline schedule defines the planned timeline for the project. By comparing it to the actual schedule, project managers can identify delays, assess their impact, and take corrective actions to keep the project on schedule.
4. **Cost Control**: The baseline budget outlines the planned expenditures for the project. Monitoring actual costs against the baseline helps in controlling project expenses, preventing cost overruns, and ensuring financial sustainability.
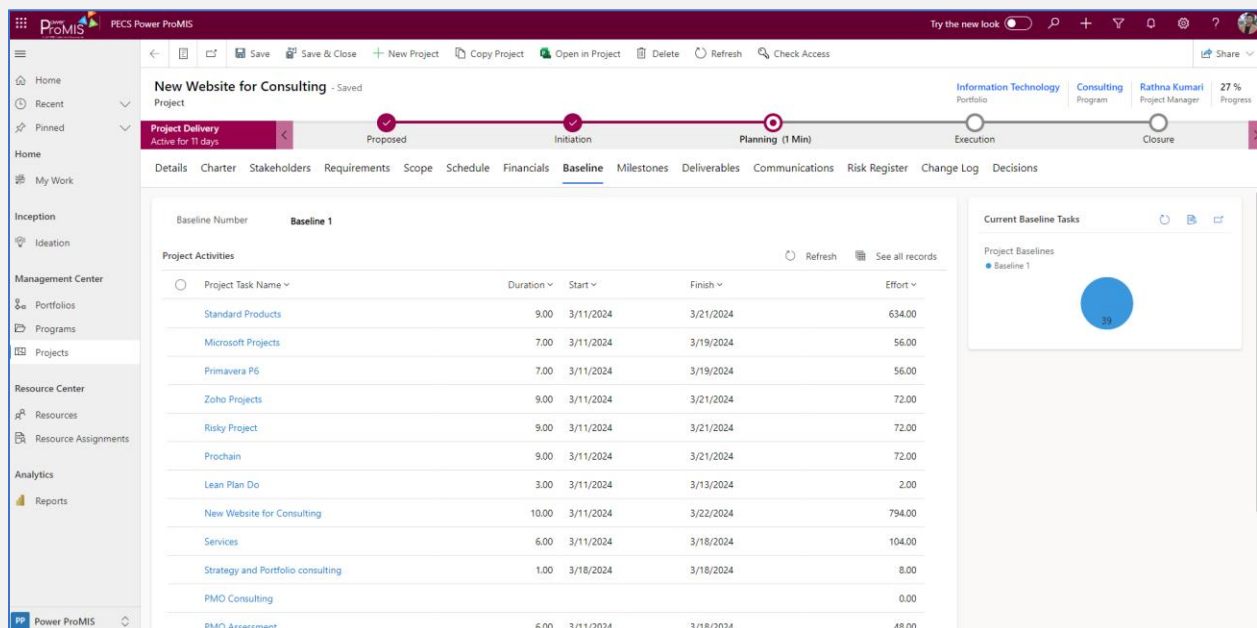
How to use: Obtain formal approval from project stakeholders, including the project sponsor and key team members, for the baselines. This signifies their commitment to the project plan.

1. To re-baseline the project we should click on the baseline tab.
2. Select the baseline number (we can see more than 10 baseline options for a project.)
3. We can see all the records of baselines also.
4. We need fill up all the required fields like task name, duration, start, finish and effort.

DELIVERABLES

Purpose: The purpose of deliverables in a project or business context is to provide tangible results or outputs that fulfill specific objectives, requirements, or expectations.

Definition: Deliverables are specific, tangible, and verifiable items or results that are expected to be produced or achieved as part of a project, task, or contractual agreement. They serve as the primary outcomes or outputs that stakeholders can use to assess the success and completion of the project or assignment. Deliverables are crucial for establishing clear expectations, managing project progress, and ensuring that everyone involved understands what needs to be accomplished.

Benefits: defining and delivering on project deliverables offers a wide range of benefits, from managing expectations and resources to ensuring quality and client satisfaction. It is an essential aspect of successful project management.

1. Clearly defined deliverables help set clear expectations for both the project team and the client or stakeholders.
2. Deliverables provide measurable objectives or milestones for tracking progress.
3. Assigning specific deliverables to individuals or teams creates accountability.
4. By specifying the quality and standards expected for each deliverable, you ensure that work is done to the required level of quality and reduces the likelihood of subpar results.
5. Identifying and listing deliverables allows for the identification of potential risks or obstacles early in the project.
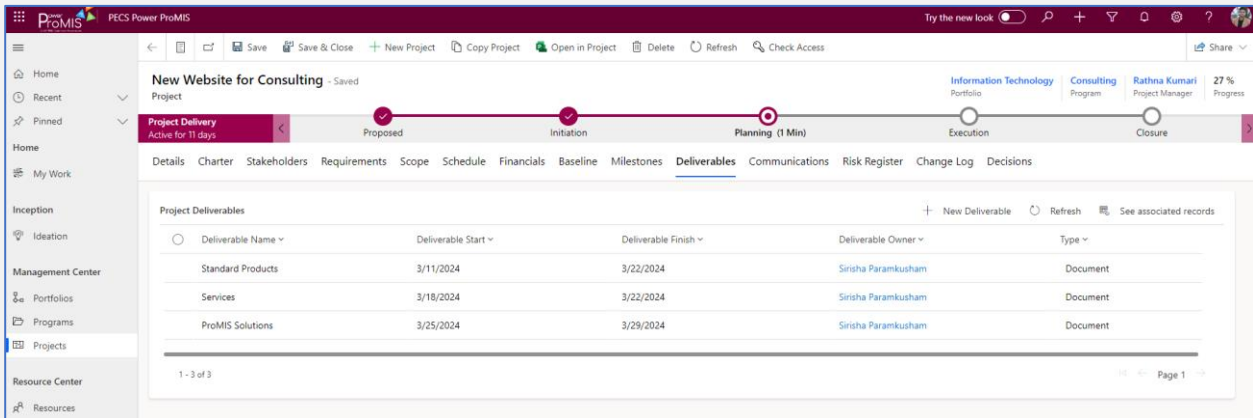
1.6 Deliverables

Field Name	Descriptions
Deliverable Name	Name of the Deliverable
Deliverable Type	We must select the deliverable type whether it is quality, product, regulatory, safety, document and specifications.

Quick Create: Deliverable ✕

Deliverable Name	*	---
Deliverable Type		---
Deliverable Start		--- 📅
Deliverable Finish		--- 📅
Deliverable Owner		---

1.6.1 Quick create deliverables.

How to use: Deliverables are tangible or intangible items, results, or outputs produced as part of a project. We should enter the details of deliverables like deliverable name, type, owner, start and finish in the quick create form by clicking the new deliverable tab.

Note: Effectively managing and using project deliverables is essential for ensuring that a project meets its objectives and delivers value to stakeholders. Clear definitions, proper planning, quality control, and communication are key factors in achieving successful project deliverables.

COMMUNICATIONS

Purpose: Communication plays a fundamental role in various aspects of human interaction, including business, personal relationships, education, and more.

Definition: In project management, "communications" refers to the processes and activities involved in planning, creating, distributing, managing, and monitoring information related to a project. Effective communication is a critical component of successful project management because it ensures that all stakeholders have the necessary information to understand the project's status, objectives, risks, and progress.

Benefits:

1. Communication ensures that project stakeholders, including team members and clients, have a clear understanding of the project's objectives, scope, and goals.
2. Effective communication engages stakeholders throughout the project, keeping them informed, involved, and invested in the project's success.
3. Clear communication helps in defining and controlling project scope, minimizing scope creep, and ensuring that project deliverables remain aligned with expectations.
4. Open communication encourages team members to identify and report project risks and issues promptly. This allows for timely risk mitigation and problem resolution.
5. Communication helps in identifying and resolving conflicts and disagreements among team members or stakeholders, preventing disruptions to the project.
6. Open communication channels enable the identification and management of project issues and change requests in a systematic manner.
7. Effective communication ensures that quality standards and requirements are understood and followed, leading to high-quality project deliverables.
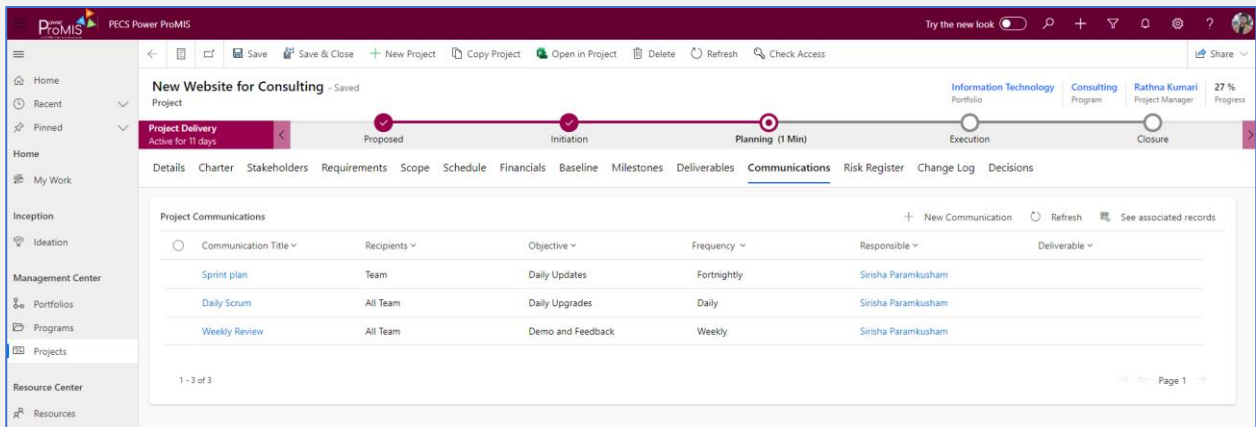
1.7 Communications

Field Name	Descriptions
Communication Title:	The purpose and content of the communication.
Recipients:	recipients refer to the individuals, groups, or entities who receive and are intended to engage with a particular message or information
Objective:	It outlines what we want to accomplish, convey, or influence when interacting with your audience.
Frequency:	How often do we engage in communication activities, whether it's sending messages, holding meetings, or providing updates? (Daily, weekly, monthly, quarterly …. etc.)

Responsible:	Depending on the context and the nature of the communication, different roles may be responsible for various aspects of the communication process.
Deliverable:	Deliverables in communication serve as tangible evidence of the planning, execution, and results of communication efforts. (Communication plan, content assets, press releases, meeting minutes…. etc.)

1.7.1 Communications

How to use:

1. We need to click on the new communication tab, we need to fill in all the details of given fields like title of the communication, created on, objective of the communication, frequency and deliverable.
2. After this we need to give responsibility for the communication by giving the details of recipients and responsibility.

3. So, the mail will appear for the person who is responsible and other recipients that are given in the fields.

Note: Effective communication is a skill that can significantly impact project success. It promotes collaboration, reduces misunderstandings, and helps keep stakeholders informed and engaged.

RISK REGISTER

Purpose: The purpose of the risk register is to identify, assess, monitor, and manage risks that may affect a project.

Definition: A risk register is a document that systematically identifies, assesses, and manage potential risks and uncertainties in a project.

Benefits of Risk register:

The key benefits of risk register are:

- Identification of risks.
- Assess the probability and impact of the risk.
- Prioritization of risks based on their severity.
- Plan risk responses.
- Creates historical record for learning.

1.6. Risk Register

Field Name	Description

Risk Name	Name of the Risk
Risk types	Risks are 2 types. 1. Opportunities 2. Threats Opportunities: Opportunities are called as positive risks which shows positive impact on a project. Threats: Threats are called negative risks which shows negative impact on a project.
Probability	Probability is a measure of the likelihood of a risk or event to occur. Risks cannot be predicted with total certainty. We can predict only the chance of a risk occurring i.e., how likely they are going to happen.
Impact	If the risk takes place, how seriously will it impact your project.
Risk score	The risk score is calculated by multiplying probability with its impact.
Response strategy	Planning risk responses consists of developing options, selecting strategies, and agreeing on actions to address overall project risk exposure, as well as to treat individual project risks. Positive risk responses: Escalate, Exploit, Enhance, Share, Accept. ➢ Escalate: Escalate risk response strategy can be used when risk cannot manage because lack of authority resources, or knowledge. Those kind risks can be escalated to the higher authority. ➢ Exploit: Eliminate the uncertainty associated with the risk to ensure it occurs. ➢ Enhance: Increases the probability or the positive impacts of an opportunity. ➢ Share: Risk sharing is a strategy that involves transferring or sharing some or all the risk with another party. ➢ Accept: Risk acceptance occurs when a business or individual accepts that the potential loss from a risk is not great enough to warrant spending money to avoid it. Negative risk responses: Escalate, Avoid, Transfer, Mitigate, Accept.

	➢ Escalate: Escalate risk response strategy can be used when risk cannot manage because lack of authority resources, or knowledge. Those kind risks can be escalated to the higher authority. ➢ Avoid: Risk avoidance means eliminating any potential impact that might harm the organization, its assets, or its stakeholders; and removing the chance that the risk might become a reality. ➢ Transfer: Risk transfer involves transferring pure risk from one party to another. ➢ Accept: Risk acceptance occurs when a business or individual accepts that the potential loss from a risk is not great enough to warrant spending money to avoid it.
Response Actions	It describes the actions to take against the risk.
Post response probability	It describes the probability of risk occurrence after the actions taken against the risk.
Post response impact	It describes the impact of risk occurrence after the actions taken against the risk.
Post response score	Post response score is calculated by multiplying probability with its impact.

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Quick Create: Risk

Risk Details

Risk Name	*	---
Risk Type		Opportunity / Threat
Due Date		---
Owner	*	Sirisha Paramkusham (Available)
Status		Active

Pre-Mitigation Analysis

Probability   1

Impact   1

Risk Response

1.6.2. Quick create form.

How to use:

Step 1: Click on project center.
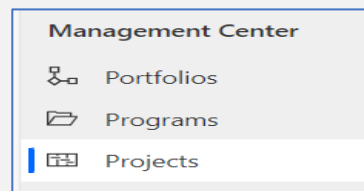
Management Center
- Portfolios
- Programs
- Projects

Step2: Select project.

Name	Start Date	Planned Finish Date
Power ProMIS softlaunch	9/29/2023	9/29/2023 10:22 AM
MS Project - Demo	9/1/2023	9/11/2023 10:45 AM
SLIC Test Idea	9/4/2023	9/4/2023 6:50 AM
Hindalco - Greenbelt Project - Demo Prep	9/1/2023	9/1/2023 5:00 PM
Softlaunch 2	9/29/2023	
Construction of a Corporate Hospital	10/1/2023	1/17/2025 5:00 PM

Step3: Click on Risk register.

Meetings   Risk Register   ...

Step4: Click on new risk.

+ New Risk   :

Response Acti... ∨   Res
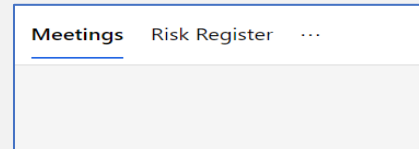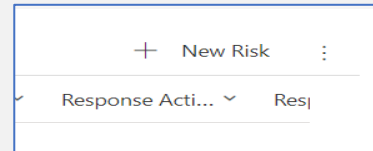
Step5: Quick create form will open.

Quick Create: Risk   ✕

Risk Details

Risk Name	*	---
Risk Type		Opportunity Threat
Due Date		--- 📅
Owner	*	Sirisha Paramkusham (Do not disturb
Status		Active

Pre-Mitigation Analysis

Probability | 1 |●————————

Impact | 1 |●————————

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Step6: Fill in the required fields.

Risk Heat Map: A risk map (risk heat map) is a data visualization tool for communicating specific risks an organization faces. A risk map helps to identify and prioritize the risks.
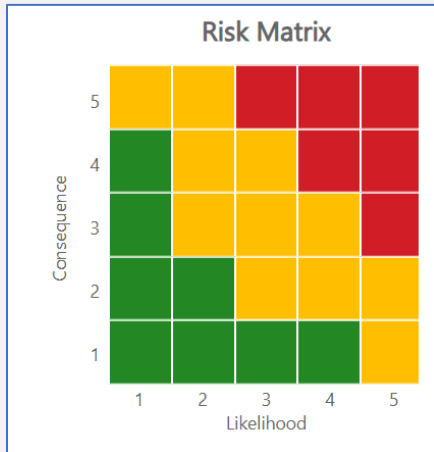
Identified risks that fall in the high-likelihood and high-severity section are typically risks that demand attention.

Green indicates low risk.

Yellow indicates medium risk.

Red indicates high risk.

PROJECT EXECUTION

Project Execution is the phase in project management where the plans and strategies developed during the project planning phase are put into action. It involves coordinating people, resources, and tasks to complete the project objectives within the defined scope, timeline, and budget. Key activities during project execution include assigning tasks, managing stakeholders, monitoring progress, addressing issues and risk, and ensuring that the project stays on track to achieve its goals. Effective project execution is crucial for the successful completion of any project.

CHANGE LOG

Purpose / Definition & Benefit

Definition: Change logs are crucial for developers, project managers, and users to understand the evolution of a product or system and to identify specific changes that may have introduced issues or improvements.

Benefits of Change Log:

1. Transparency: A change log provides transparency to users, customers, and other stakeholders about what changes have been made to a product. This transparency builds trust and helps users understand the evolution of the product.

2. Communication: It serves as a communication tool between developers, product managers, and end-users. It allows developers to convey what they've been working on and how it impacts users.

3. Documentation: It serves as documentation for historical reference. Developers can look back at previous releases to understand why certain changes were made, and users can refer to it for information on the latest features and improvements.

4. User Engagement: Sharing what's new in each update can engage users and encourage them to explore the product further. This can be especially important in marketing new features or improvements.

5. Quality Assurance: It can be a tool for quality assurance. By documenting changes, it's easier to identify when a specific issue or feature was introduced, making it easier to trace problems back to their source.

Figure 1.1 (Change Log)

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Figure 1.2 (Change Log)

Field descriptions:

Field Name	Description
Change Name	Name of the factor that you need to change or make modifications.
Project Name	You must first select the project for which you want to make modifications.
Description	Please provide a description of the change.
Re-baseline	If you wish to reset the baseline, please choose either yes or no.
Requestor	Please provide the name of the person making this request.

Approver	Please specify the person from whom you require approval.
Priority	Within the priority field, you should choose from the following options: Low, medium, high or very high.
Impact	Within the impact field, you should choose from the following options: Low, medium, high or very high.
Cascading Impact	
Benefit	The Benefit of a change log is to provide a record of all modifications made.
Comment	Please add a comment to the change log.
Assigned to	Please add the name of the person to whom you are assigning.

How to use:

1. To create a change log, we need to click on 'New Change Log' as shown in above figure 1.1.
2. After selecting a new change log, a quick creation pop-up will appear where you can fill in the necessary   information as it is shown in figure 1.2.
3. After feeling the information click on save & close.

ISSUE LOG

Purpose / Definition & Benefit

Definition: An issue log, also known as an issue tracking log or issues register, is a document or a digital tool used in project management and various business processes to systematically record and manage problems, challenges, or concerns that arise during a project or other work activities.

Benefit:

1   Problem Identification: An issue log allows you to systematically identify and document problems, concerns, or challenges as they arise. This ensures that issues are not overlooked or forgotten.

2. Accountability: Assigning issues to specific individuals or teams creates accountability for problem resolution. This helps ensure that issues are addressed in a timely manner.

3. Prioritization: Issue logs enable you to prioritize problems based on their severity and impact. This helps you allocate resources efficiently and focus on the most critical issues first.

4. Communication: Issue logs promote transparent communication within a team or organization. They provide a centralized location for team members to discuss and update the status of issues.
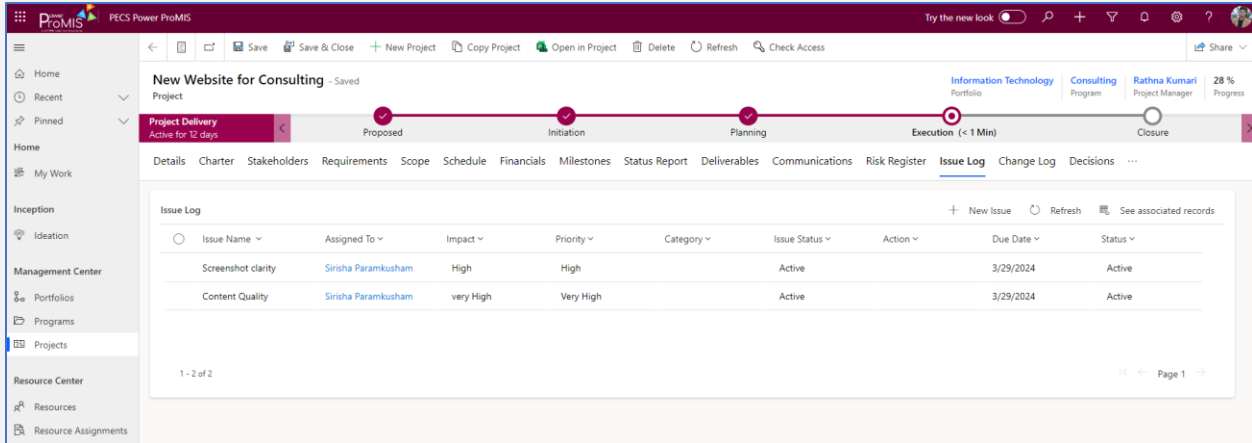

Figure 2.1 (Issue Log)

Figure 2.2 (Issue Log)

Field description

Field Name	Description
Issue Name	Please input the name of the issue.
Description	Please provide a description of the issue log.
Assigned to	Please add the name of the person to whom you are assigning.
Category	Please specify the category for the issue log.
Status	Issue log status to be given whether it is active, closed or in progress.
Priority	Within the priority field, you should choose from the following options: Low, medium, high or very high.
Impact	Within the impact field, you should choose from the following options: Low, medium, high or very high.
Action	Please mention what action should be taken for the issue log.
Due date:	The "due date" in the context of project issue log is used to specify or document the date by which a particular issue log or project requirement must be met or satisfied.

How to use:

1. To create an Issue log, we need to click on 'Issue Log' as shown in above figure 2.1.
2. After selecting the new issue Log, a quick creation pop-up will appear where you can fill in the necessary information as it is shown in figure 22.
3. After feeling the information click on save & close.

DECISIONS

Purpose / Definition & Benefit

Definition: Decisions in a PMO context are the resolutions or determinations made by project stakeholders, often in response to specific issues, challenges, or opportunities. These decisions are typically documented, communicated, and serve as a basis for future actions and project progress.

Benefit:

1. Project Direction: Decisions help establish the overall direction of the project. They define the project's scope, objectives, and priorities, which are essential for keeping the team aligned and on track.

2. Resource Allocation: Decisions about resource allocation (e.g., budget, personnel, materials) ensure that the project has the necessary resources to meet its goals. Efficient resource allocation prevents waste and delays.

3. Risk Management: Identifying and addressing risks through decisions can help mitigate potential issues that could threaten the project's success. Decisions regarding risk assessment, contingency planning, and risk responses are vital.

4. Quality Assurance: Decisions related to quality standards and control measures ensure that the project's deliverables meet the required quality criteria. This helps prevent rework and customer dissatisfaction.

5. Time Management: Effective decisions regarding project scheduling and task prioritization are essential for meeting deadlines and milestones. Poor decisions in this area can lead to project delays.

6   Progress Monitoring: Decisions about key performance indicators (KPIs) and metrics to track progress help project managers assess the project's status. This information informs future decisions to keep the project on track.

10. Continuous Improvement: After the project is completed, decisions regarding lessons learned and post-project evaluations help gather insights and best practices for future projects. This continuous improvement process is valuable for the organization.
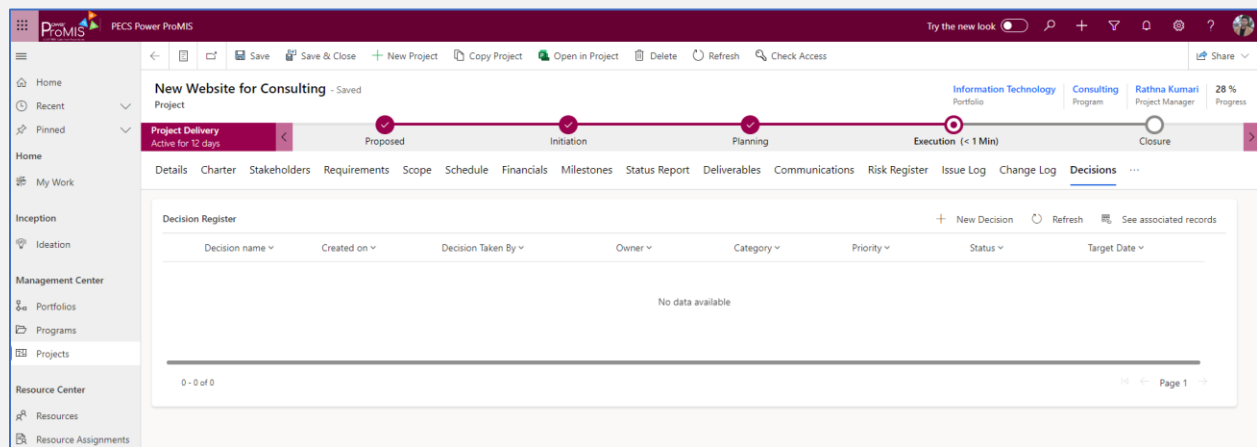
Figure 3.1 (Decision)

Figure 3.2(Decision)

Field description

Field Name	Description
Decision Name	Provide a name for the decision.
Created On	Please enter the creation date.
Decision Taken By	Provide the name of the person who made the decision.
Owner	Provide the name of the owner.

Category	Within the category field, you should choose from the following options: Scope, requirement, reserve, time, budget.
Priority	Within the priority field, you should choose from the following options: Low, medium, high or very high.
Status	Decision status to be given whether it is Implemented, Pending.
Target Date	Please input the target date by which you need to complete the task.

How to use:

1. To create a Decision, we need to click on 'Decisions' as shown in above figure 3.1.
2. After selecting New Decisions, a quick creation pop-up will appear where you can fill in the necessary information as it is shown in figure 3.2.
3. After feeling the information click on save & close.

PROGRESS UPDATE

Purpose / Definition & Benefit

Definition: A "progress update" typically refers to a report or communication that provides information about the status or advancement of a particular project, task, or goal. Progress updates are commonly used in various contexts, including business, education, and personal projects, to keep stakeholders, team members, or supervisors informed about how well a project or task is proceeding.

1. Transparency: Progress updates keep all relevant parties informed about the current status of a project or task. This transparency can help build trust among team members and stakeholders.

2. Accountability: Regular updates hold individuals and teams accountable for their tasks and deadlines. When progress is tracked and reported, it's easier to identify areas where improvements are needed.

3. Early Issue Identification: By reporting progress regularly, any issues or obstacles can be identified and addressed early. This can prevent small problems from becoming large, costly ones.

4. Course Correction: Progress updates provide an opportunity to assess the current trajectory and make necessary adjustments to ensure that goals are met. If you notice that things are not progressing as planned, you can take corrective action.

6. Communication: Regular updates promote better communication within a team. Team members can share information, provide feedback, and collaborate more effectively.

7. Stakeholder Involvement: In business and project management, stakeholders often need to be kept informed of progress. Regular updates can help keep stakeholders engaged and satisfied.
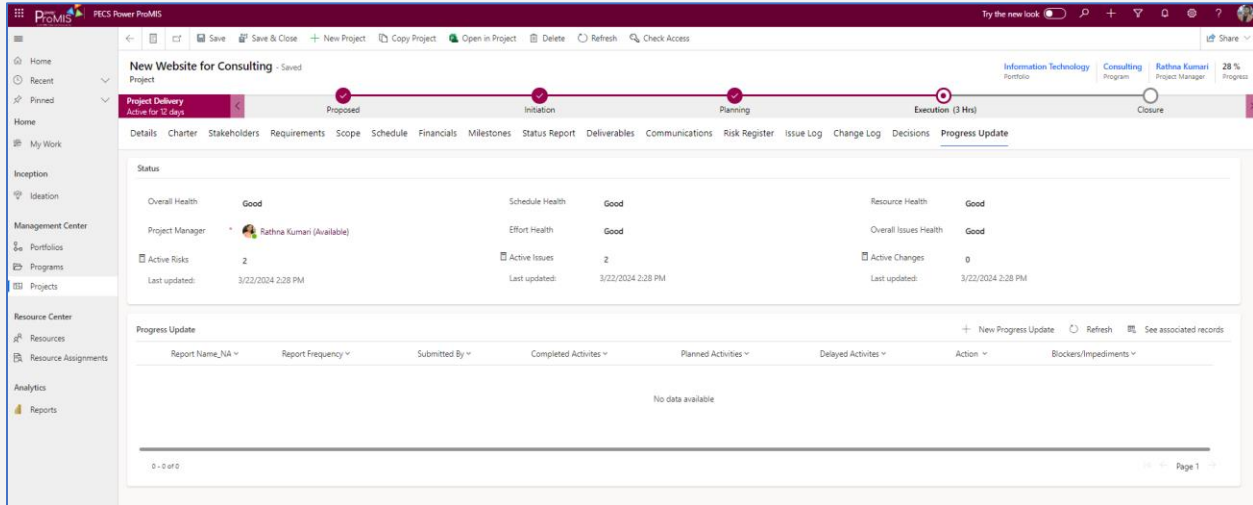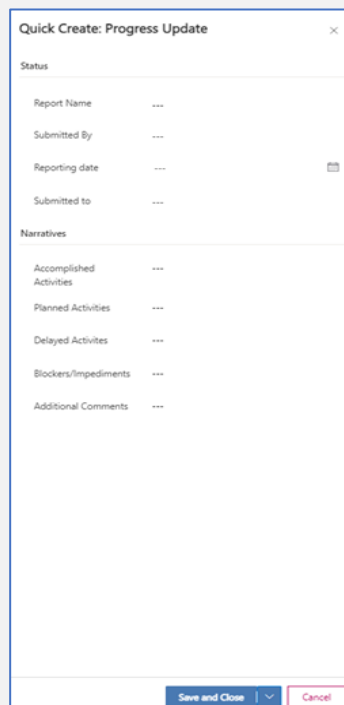

Figure 4.1(Progress Update)

Field Descriptions:

Field Name	Description
Report Name	Please input the name of the report
Submitted By	Mention the name of the person who has submitted the report
Reporting Date	Mention the reporting date
Submitted to	Please specify the person to whom you have submitted it.
Accomplished Activities	Please mention the task or the activities that have been successfully completed or finished as part of a project.
Planned Activities	Mention the task or activities that you are going to plan for the next sprint.
Delayed Activities	Mention the task or activities that got delayed.
Blockers/Impediments	Please identify the task that is expected to impede or delay the project.
Additional Comments	• If you have any additional comments, please write it here.

How to use:
1. To create a Progress Update, we need to click on 'Progress Update' as shown in above figure 4.1.
2. After selecting New Progress Update, a quick creation pop-up will appear where you can fill in the necessary information as it is shown in figure 4.2.
3. After feeling the information click on save & close.
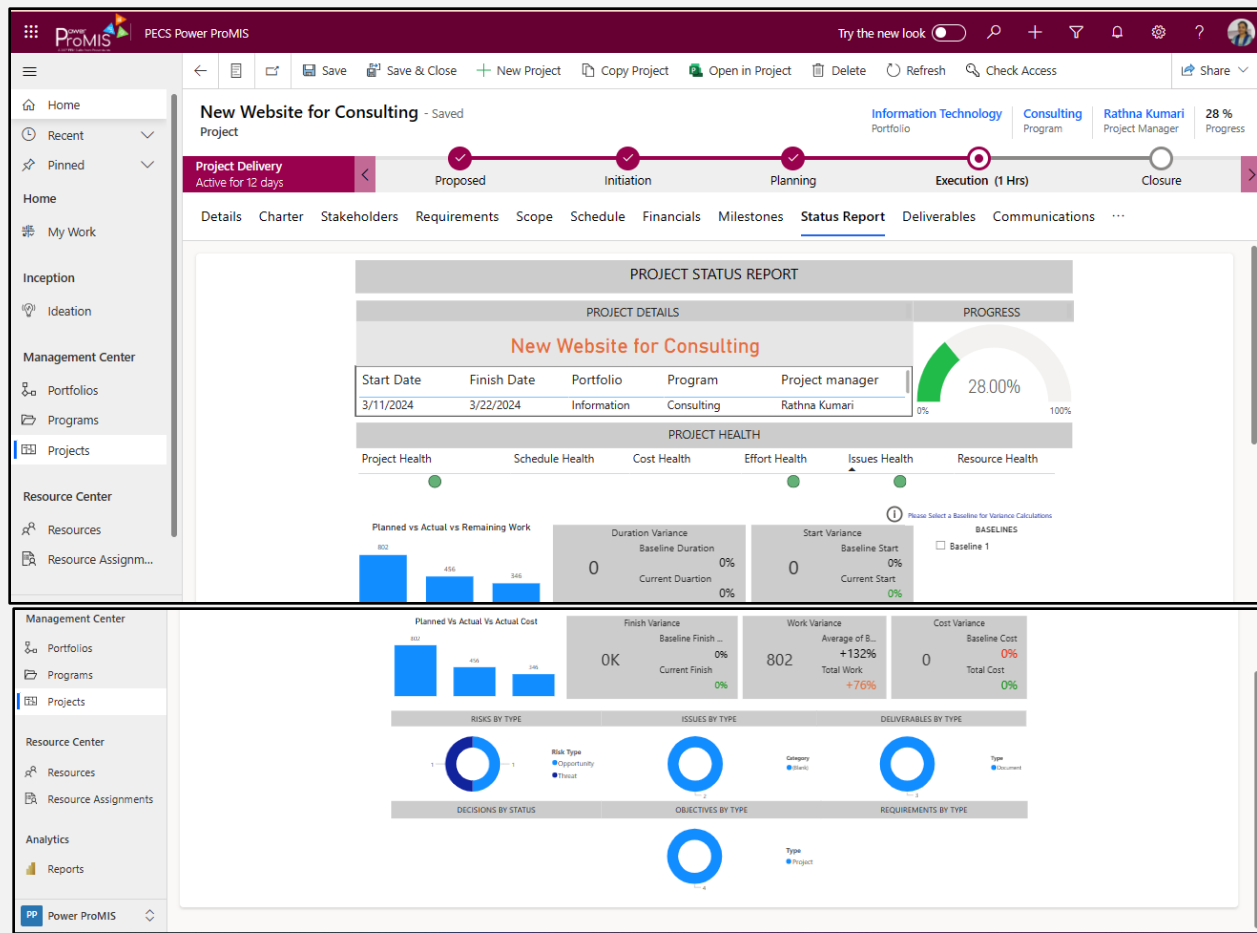
STATUS REPORT

Definition & Benefit

Definition: A status report is a document or presentation that provides an update on the progress, status, and key developments of a project, task, or initiative. It typically includes information about accomplishments, challenges, upcoming milestones, timelines, resource allocation, and any issues or risks that may impact the project's success. Status reports are essential for keeping stakeholders informed and ensuring alignment with project goals and objectives.

Benefits of Status Report:

1. Transparency: They provide stakeholders with a clear view of project progress, helping to build trust and accountability.

2. Communication: They facilitate communication by summarizing key information in a concise format, ensuring that all stakeholders are on the same page.

3. Problem Identification: Status reports highlight any issues or risks that may arise, allowing for early intervention and problem-solving.

4. Decision Making: They provide stakeholders with the necessary information to make informed decisions about project direction, resource allocation, and priorities.

5. Accountability: By documenting progress and commitments, status reports hold team members accountable for their responsibilities and deadlines.

6. Alignment: Status reports help ensure that everyone involved in the project is aligned with its goals, objectives, and timelines.

7. Documentation: They serve as a valuable record of project history, documenting achievements, challenges, and decisions made throughout the project lifecycle.

Figure 4.1(Status Report)

Field Descriptions:

Field Name	Description
Project Details	Project details to be shown
Start date	Project start date shown here
Finish date	Project expected finish date shown here
Portfolio	Name of the portfolio for which project is belong to
Program	Name of the program for which project is belong to
Project manager	Name of the project manager.
Progress	Progress of the project will be visible here.
Project Health	Response will be shown here whether it is good, bad or it is Risk
Schedule Health	Response will be shown here whether it is good, bad or it is Risk
Cost Health	Response will be shown here whether it is good, bad or it is Risk
Effort Health	Response will be shown here whether it is good, bad or it is Risk
Issues Health	Response will be shown here whether it is good, bad or it is Risk
Resource Health	Response will be shown here whether it is good, bad or it is Risk
Planned vs Actual vs Remaining work	Automatically update here
Duration variance	Automatically update here
Start variance	Automatically update here
Baselines	No of baselines approved will be shown
Finish variance	Automatically update here
Work variance	Automatically update here
Cost variance	Automatically update here
Risk by type	Automatically update here
Issues by type	Automatically update here
Deliverables by type	Automatically update here
Objectives by type	Automatically update here
Requirements by type	Automatically update here
Decisions by Status	Automatically update here

Use of the Status report: status reports are essential tools for effective project management, enabling stakeholders to stay informed, engaged, and proactive in driving project success. They provide a

structured mechanism for communication, transparency, accountability, and decision-making throughout the project lifecycle.

PROJECT CLOSURE

Project closure, also known as project closeout, is the final phase of a project management process that occurs after a project has been completed, delivered, and its objectives have been achieved. The primary purpose of project closure is to ensure that all aspects of the project are wrapped up efficiently and effectively.

LESSONS LEARNT

Purpose / Definition & Benefit

Definition: A structured process of documenting and sharing knowledge and experiences, especially in the aftermath of a project, initiative, or significant event. This documentation is intended to benefit future projects or endeavors by ensuring that past mistakes are not repeated and that successful strategies are applied. It may involve analyzing what went well and what went wrong, identifying root causes, and making recommendations for improvement.

Benefit:

1. Improved Decision-Making: Lessons learned help individuals and organizations make more informed decisions in the future. By understanding what went right and what went wrong in previous situations, they can make better choices and avoid repeating past mistakes.

2. Enhanced Problem-Solving: Lessons learned provide insights into how to address challenges and problems more effectively. It allows individuals to identify and implement solutions that have worked in similar situations.

3. Risk Mitigation: Recognizing lessons learned can help in identifying potential risks and developing strategies to mitigate them. This proactive approach can save time and resources by preventing issues from escalating.

4. Increased Efficiency: By understanding what processes or approaches were successful and which were not, individuals and organizations can streamline their operations. This can lead to increased efficiency and cost savings.

5. Continuous Improvement: Lessons learned contribute to a culture of continuous improvement. When people actively seek out and apply lessons from their experiences, they can continually refine their practices and achieve better results over time.
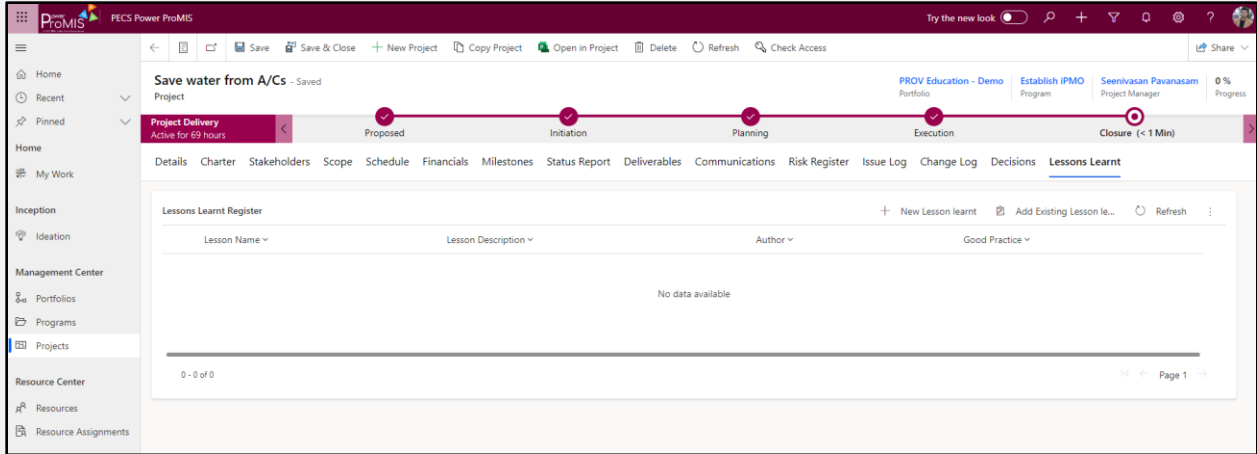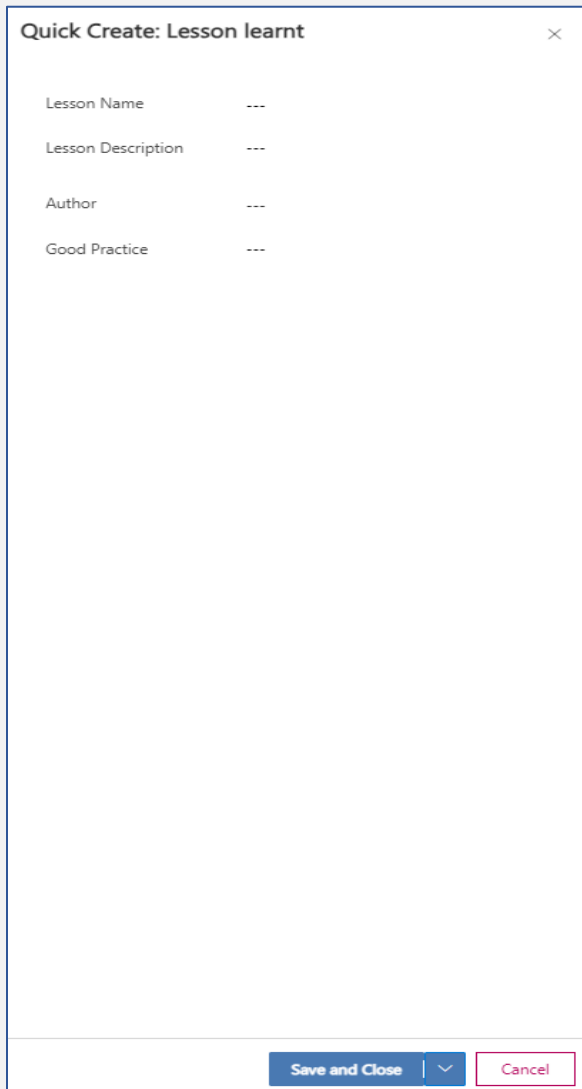
Figure 5.1(Lessons Learnt)

Figure 5.2(Lessons Learnt)

Field Descriptions:

Field Name	Description
Lesson Name	Provide the name for the lesson learnt
Lesson Description	Kindly provide a description of the lesson you learned for the mistake or any notable achievement in this project
Author	A person who writes or created the lesson learnt.
Good Practice	It refers to encompassing a range of techniques, methodologies and approaches that contribute to successful project execution.

How to use:

1. To create Lessons Learnt, we need to click on 'Lessons Learnt' as shown in above figure 5.1.
2. After selecting New Lessons Learnt, a quick creation pop-up will appear where you can fill in the necessary information as it is shown in figure 5.2.
3. After feeling the information click on save & close.