MARSHALL UNIVERSITY
INFORMATION TECHNOLOGY
IT Project-List Instructions and Definitions

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DEFINITIONS
PROJECT
A temporary organization, with people and other assets required to achieve an objective or other outcome. Each Project has a lifecycle that typically includes initiation, planning, execution, closure etc. A project is a temporary endeavor undertaken to create a unique product, service, or result. The temporary nature of projects indicates a definite beginning and end.

A project differs from a ticket in the following areas:

- A project supports the institution's shared strategic commitments, while a service ticket is linked to a specific operational issue
- A project has not been done in the past and is unique; therefore it has a single combination of, resources, cost, schedule and objectives. A service ticket however is not unique and can be replicated in its description and solution
- Service tickets tend to focus on current, immediate needs, while projects include future needs, making new opportunities and innovations possible
- A project tends to have a large, well defined scope, while service tickets have reduced and specific objectives
- A project usually takes more than **40 person-hours** of work and coordination among multiple departments
- Service tickets may be a subset of projects. A project will never be a subset of a ticket

PROCESS
A structured set of activities designed to accomplish a specific objective. A Process takes one or more defined inputs and turns them into defined outputs. A Process may include any of the roles, responsibilities, tools and management controls required to reliably deliver the outputs. A Process may define Policies, Standards, Guidelines, Activities, and Work Instructions if they are needed.

FIELDS IN THE PROJECT LIST (definition and their entry)

PROJECT TITLE (REQUIRED)
Working name or title for this project
      Enter as free form text (short) must be unique.

BUSINESS CASE

Tie this project to the Institutions business drivers.

> Choose from list.

PROJECT SUMMARY

One paragraph summary of the Project including at least:
1. Major Goals
2. Major Benefits
3. Critical Success Factors
4. Scope (both In-Scope and Out-of-Scope items)
5. Key Deliverables
6. Stakeholders.

Enter as free form text.

GOALS AND OBJECTIVES (REQUIRED)

Match this project to the major IT Goal/Objectives

> Choose from list

SWOT

Does this project principally build on Strengths, lessen Weaknesses, improve/capitalize on Opportunities or decrease Threats?

> Choose from list.

PRIORITY

Agreed priority of this project

> Choose from list.

PROJECT DEPARTMENTS

The home department owning the project

> Choose from list (may be more than one).

PROJECT PHASE

What is the current phase of the entire project life cycle?

> Choose from list.

EXECUTIVE SPONSOR

The VP or Senior VP that is requesting, funding, and providing high level guidance/decisions for the project.

Enter names or email addresses for validation by Active Directory.

PROJECT MANAGER (REQUIRED)

The IT person responsible for the day to day management of the project.

Enter name or email address for validation by Active Directory.

PROJECT TEAM

The team responsible for project implementation. The main project team, can be outside of central IT.

Enter names or email addresses for validation by Active Directory.

TIME ESTIMATE (hrs.)

The best estimate of the person time (in hours) for the project.

Enter as a whole number.

FUNDING SOURCES

Agreed funding sources for project. Should include free form text and should include at least:

1. Acquisition costs of hardware/software/consulting and splits between budget entities
2. Contracted help
3. Commitment of personnel time by budget entities
4. On-going maintenance costs and their division between budget entities.

Enter as free form text.

PROJECT START DATE (REQUIRED)

Agreed-upon start date when given approval to execute.

Choose date from calendar.

CURRENT STATUS

What is the current project status from a pick list.

Choose from list.

PERCENT OF PROJECT COMPLETE (REQUIRED)

An estimate of the % completion of the execution phase of the project. A number as %.

Enter as a whole number representing the composite %age complete, taking into account effort, deliverables, and time.

EXPECTED DATE OF COMPLETION (REQUIRED)

Targeted completion date.

Choose date from calendar.

PROJECT UPDATE (REQUIRED)

Periodic entries summarizing project phases/stages, progress, issues, risks, changes, etc. Used as IT_Exec tactical update.

Enter free form text. It will be time stamped for you.

PROJECT DOCUMENT SITE

The URL and description of a Project Site that stores related documents, etc.

Enter the URL (and test) then a short description of the site. For smaller projects documents may be attached directly to this list item (click on EDIT tab and Attach File button)

PROJECT PUBLIC SITE

The URL and description of a Project website that is open to the public.

Enter the URL (and test) then a short description of the site.

ACTUAL COMPLETION DATE

Actual completion date when project closure process is complete.

Choose date from calendar.

TIME ACTUAL (hrs.)

Final time (in hours) for the length of the project.

Enter a number.

PROJECT HEALTH (REQUIRED)

Current health of the project expressed by descriptions:

Green: the project is progressing according to the plan... expecting to deliver on time/scope/budget.

Yellow: there are issues/risks that will impact the project if not addressed/removed… not expecting to deliver on time/scope/budget without intervention/assistance.

Red: there are issues/risks impacting upon the project and preventing it from being delivered on time/scope/budget without major intervention/assistance.

Choose from List.

RELATED PROJECTS

List of related/dependent projects.

Choose from List of current/past project titles.

IT-EXEC OWNER

This field is to contain the principal IT-EXEC member that is responsible for reporting on the project.

Choose from the list of IT-EXEC members

FOOTPRINTS TICKETS

Enter related FootPrint Tickets that are related to this project here.

BUDGET

Project Budget

ACTUAL

Project Actual Cost

ENTRY INSTRUCTIONS (SharePoint Online)

ENTRY OF NEW ITEM IN LIST:

Point browser to: IT Project Portfolio List

You should see something similar to:

Click on at the top of the list or:

You should then see the following:

Fill in all of the relevant fields and then click on the save button at the bottom.

EDIT AN EXISTING ITEM IN LIST
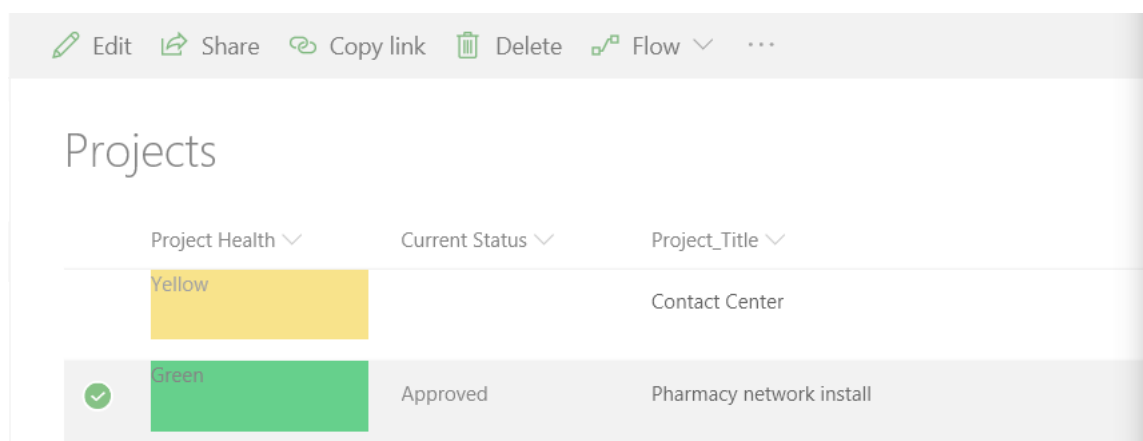
Point browser to: IT Project Portfolio List

You should see something similar to:

Click on the bobble next to the Project Health column on the list item you want to edit, select on the top.

You should then see something similar as below on the right.

💾 Save   ✕ Cancel   ⌘ Copy link   ✕

Pharmacy network install

Project_Title *

Pharmacy network install
_____
working name or title for this project

Business_Case

Enter value here
_____
Tie this project to the Institutions business drivers.

Project Summary

Purchase/installation of IT Infrastructure for the new Pharmacy facility.

_____
One paragraph summary of the Project including at least 1) Major Goals 2) Major Benefits; 3) Critical
Success Factors; 4) Scope - In-Scope, Out-of-Scope; 5)Key Deliverables; 6) Stakeholders.

Goals and Objectives

2018 Goal: Reliable Infrastructure (wired, wireless, voice, data, internet)   ⌄
_____
Match this project to the major IT Goal/Objectives.

SWOT

Strengths   ⌄
_____
Does this project principally build on Strengths, lessen Weaknesses, improve/capitalize on
Opportunities; or decrease Threats?

Make changes to the fields you want to modify then click the save button at the top.
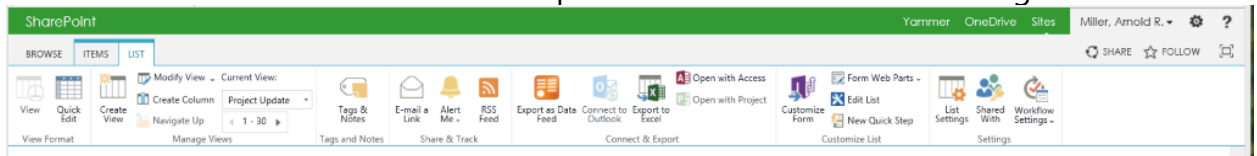
💾 Save   ✕ Cancel   ⌘ Copy link

QUICK-EDIT AN EXISTING ITEM IN LIST:

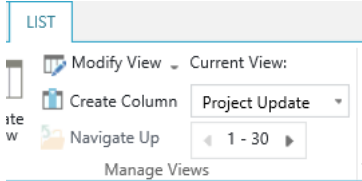Point browser to: IT Project Portfolio List
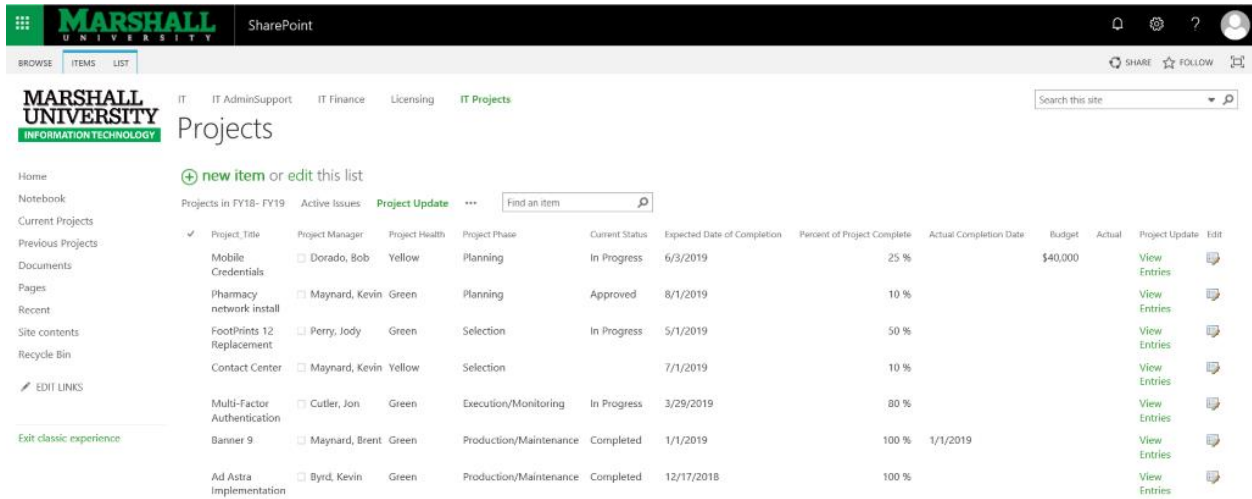You should see something similar to:

Click on the list tab [LIST] tab on the operations bar to see the following header bar:
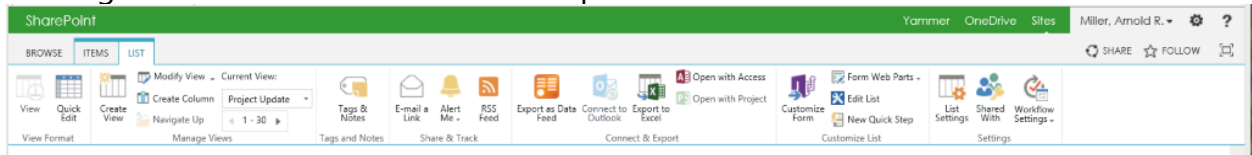

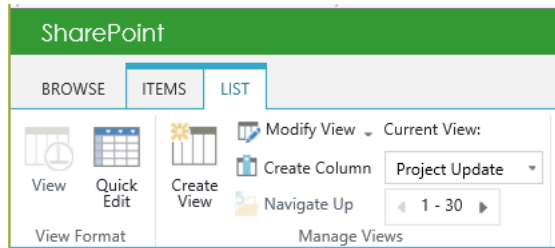From the Current View: selection field select Project Update from the drop-down list.

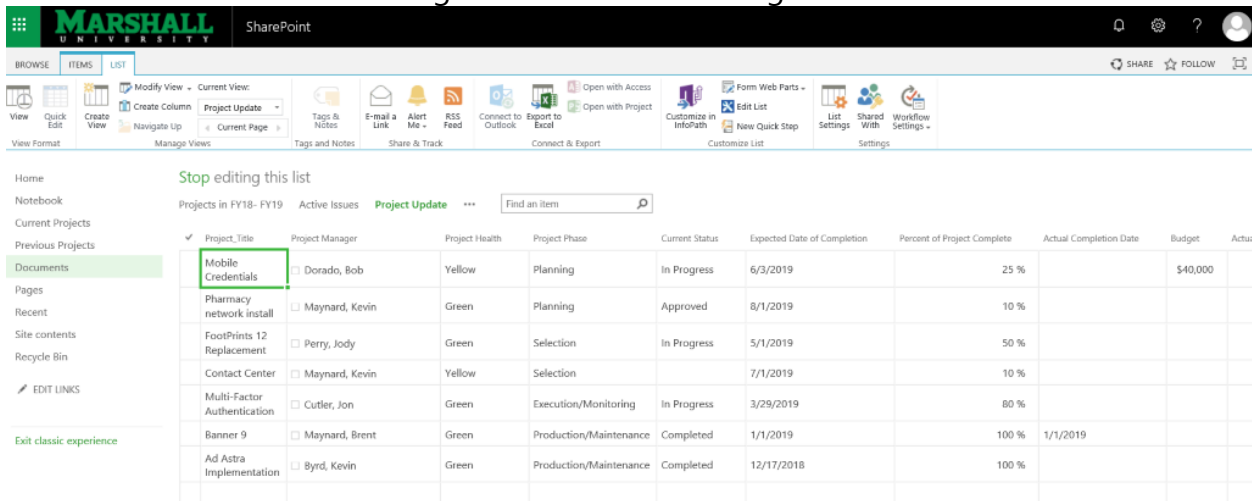You will then see something similar to the following:

Click again on the list tab [LIST] on the operations bar to reveal the List Header Bar:
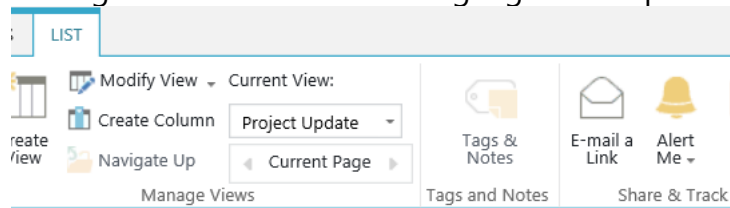

And choose Quick Edit

You should then see something similar to the following:

You are now in the quick edit mode and should be able to move from field to field as in a spreadsheet and edit most of the entries more quickly than going to the long form edit screen. Some types of fields will take you to the long form screen anyway to do the editing. Just exit that screen and you will be returned to the quick edit screen. To finish editing in this mode click the highlighted Stop editing this list text.