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Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Fonda Logston	Reviewing Unit:	PMO
Title:	Project Management Methodology Standard		
Description:	This document is the standard for project management methodology.		

Project Management Methodology Standard

1. General Statement of Purpose
 - 1.1. The purpose of this document is to document the State of Oklahoma IT Project Management Methodology Standard.
2. Scope
 - 2.1. This standard applies to anyone who serves as an IT Project Manager.
3. Discipline
 - 3.1. Program Management Standards
4. Terms and Definitions
 - 4.1. HP Project and Portfolio Management Tool (PPM) – An online tool for tracking IT project information.
 - 4.2. Phase – An identifier that highlights the progression of a project.
 - 4.3. Deliverable – a tangible or intangible object produced as a result of a project that is intended to be delivered to a customer (either internal or external). A deliverable could be a report, a document, a server upgrade or any other building block of an overall project.
 - 4.4. High Level Plan – A broad overview of what a project will entail. It includes the Business Case, Cost Benefit Analysis, Risk Identification, and the High Level Milestone Plan. The deliverables will be based on a +/- 50% accuracy.
 - 4.5. Detail Level Plan – A detailed overview of what a project will entail. It includes the Business Case, Cost Benefit Analysis, Risk Identification, and the High Level Milestone Plan. The deliverables will be based on a +/- 10% accuracy.
 - 4.6. Work Plan – A list of ordered tasks required for the scope of a project.
 - 4.7. Staffing Profile – A list of staffing needs by role needed to complete a project.
 - 4.8. Financial Summary – A list of actual and forecast costs associated with a project.
5. Instructions
 - 5.1. There are six phases of a project: Concept, Initiation, Planning, Execution, Execution-Close and Close. Each phase has deliverables needed for an IT project.
 - 5.1.1. **Concept** – Every project starts off as a proposal. All proposals are in the Concept phase. This is where new project ideas are proposed. They define preliminary description, benefits, and scope.
 - 5.1.2. **Initiation** – When a proposal goes into Initiation, it becomes a project. It is in this phase when work begins on the initial cost estimates, the time schedule, and resource commitments. The High Level Plan and Risk and Value Assessment are mandatory deliverables that are developed in Initiation as well. The High Level Plan consists of a Work Plan, a Staffing Profile, and a Financial Summary. A Business Case and Cost Benefit Analysis (CBA) are also created during Initiation, if needed.

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5.1.3. **Planning** – It is during this phase when work begins on the Detail Level Plan, which involves updating the Work Plan, Staffing Profile, and Financial Summary, as well as the Business Case and CBA, if necessary. The updated Detail Level Plan is a mandatory deliverable in the Planning Phase.

5.1.4. **Execution** – During Execution, resources perform the work to create and deploy the project deliverables, outlined in the Detail Work Plan. The Work Plan is updated with completed tasks and actual hours. The Financial Summary is updated with actuals and invoice amounts.

5.1.5. **Execution-Close** – This phase is when all the work for the project has been completed, but the Project Manager is waiting on final invoices and actuals to post before closing the project.

5.1.6. **Close** – During this phase, the work plan, financial summary, and staffing profile will all be closed. The actual complete date, actual costs, and project closing statements should all be completed.

5.1.6.1. The Project Manager must request a project to be closed, but only the PMO can “close” a project.

5.1.6.2. There are two buttons the Project Manager must select in the project to request closure.

5.1.6.2.1. **Request Closure** button – Selecting this button will prompt the Project Manager to make sure all the required information is keyed in.

5.1.6.2.2. **Ready for Audit** button – Selecting this button will send the project to the PMO for closure. After this button has been pressed, the project cannot be edited.

5.2. After the Project Manager has pressed the **Ready for Audit** button, the project will be sent to the PMO. The PMO will perform an audit to make sure certain requirements have been met. It is required that all projects have a documented Work Plan, Staffing Profile, Forecast Costs, and Actual Costs.

6. Roles and Responsibilities

6.1. Project Manager – Create and update the project in the PPM Tool.

6.2. Project Management Office (PMO) – Perform the audit process before closing the project.

7. Limitation or Implementation Notes

7.1. This procedure will require the user to have access to the PPM Tool.

7.2. Project Managers must request an audit on their project before it can be closed.

7.3. Only the PMO can close an IT project.

8. References

8.1. Additional information for project deliverables can be located on the ISD Process Library (eclipse.omes.ok.gov).