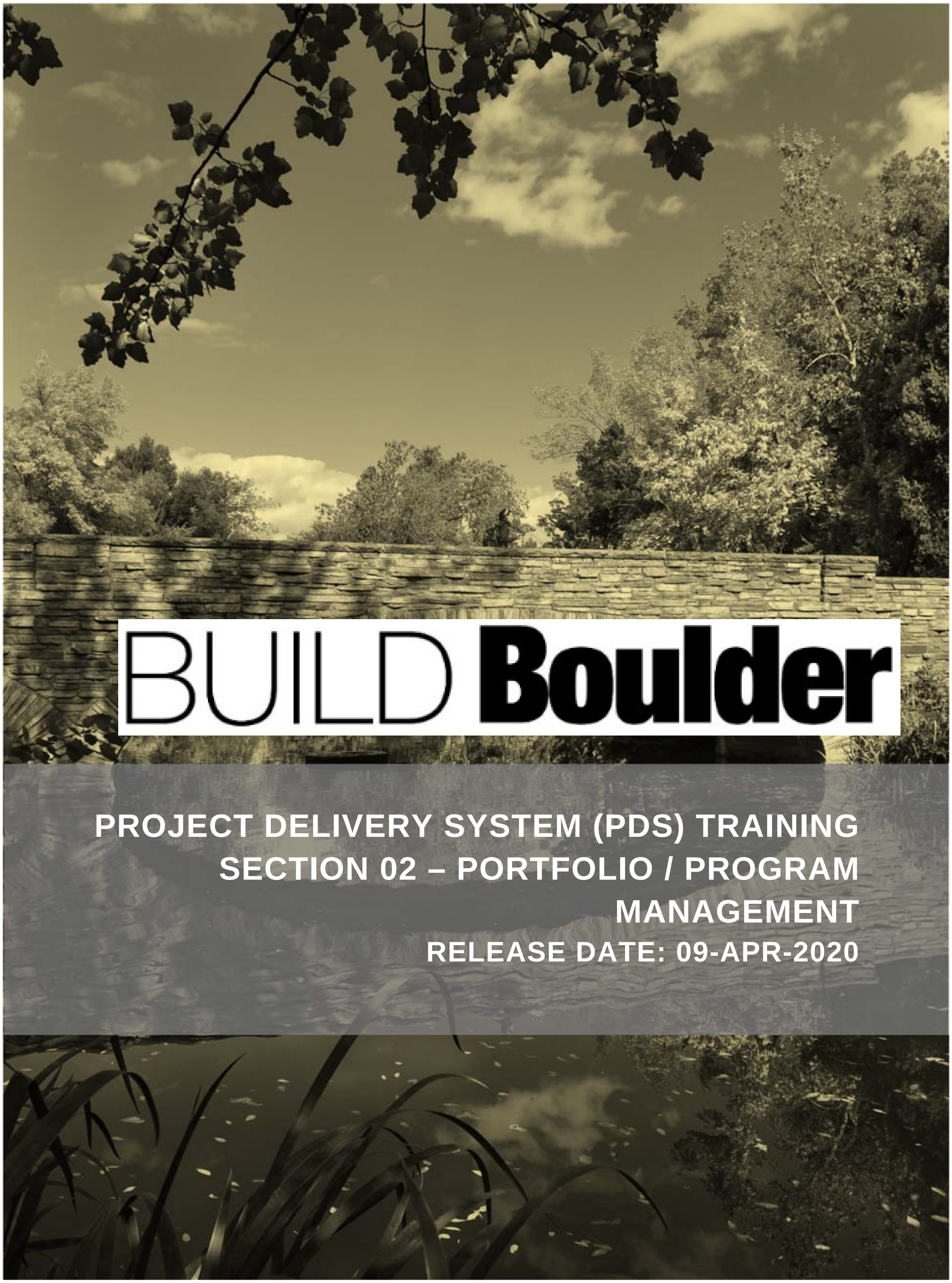

BUILD Boulder

PROJECT DELIVERY SYSTEM (PDS) TRAINING
SECTION 02 – PORTFOLIO / PROGRAM MANAGEMENT

RELEASE DATE: 09-APR-2020

REVISION TRACKING

Revision	Author(s)	Approved By	Issue Date	Reason
v3-0	Sage Method		03/12/20	Unifier Mar 2020 Go Live
v3-1	Sage Method	K Dunklau	4/3/2020	Updates
v3-2	Sage Method	K Dunklau	4/9/2020	Final for distribution

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2.0 PORTFOLIO / PROGRAM MANAGEMENT INTRODUCTION

2.0.1 INTRODUCTION

Portfolio and program management focus on the ability to use standardized information across projects in a rollup as well as being able to see how projects are doing at a summary level.

Programs are part of phase 2 and will be rolled out in the future.

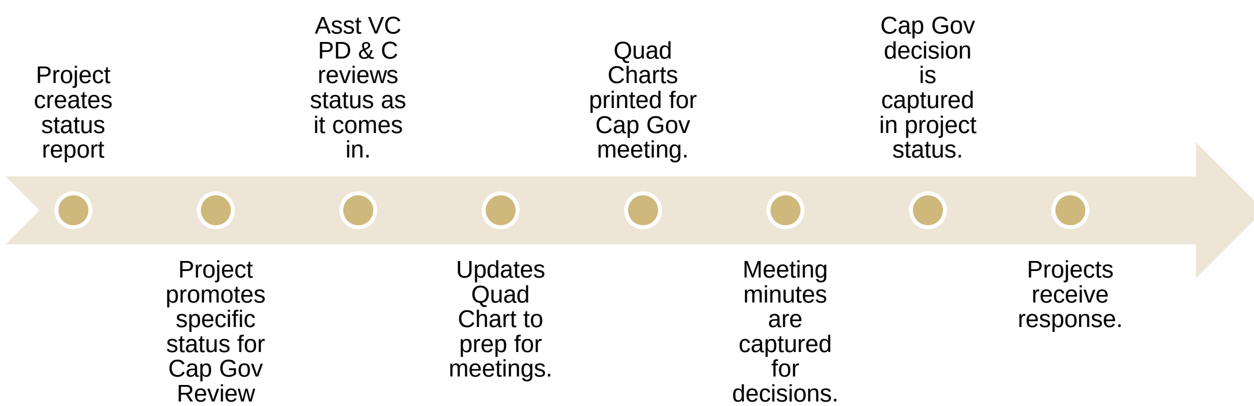
2.1 GOVERNANCE

2.1.0 INTRODUCTION (UPDATED: 2/24/2020)

Governance exists at both a portfolio/ program level as well as the project level. This includes the ability to manage overall project data and how it will interact with the portfolio of works.

The Request Application initiates the project in the Unifier system.

The Capital Governance process allows for projects to be reviewed at a “roll-up” level at key review periods. The high-level process for review is:



2.1.1 SUBMITTING A REQUEST APPLICATION (UPDATED: 2/20/2020)

Goals How to formally request creation and assignment of a Project.

Navigation Company Workspace>Request Applications

Action By Project Coordinators

Pre-requisites Identified Funding for the Project. Any relating to earlier communications with requesting Department.

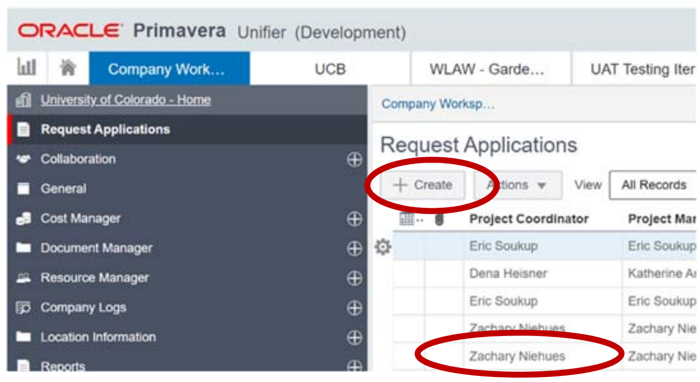
Related Files

Action By: Project Coordinators	Example

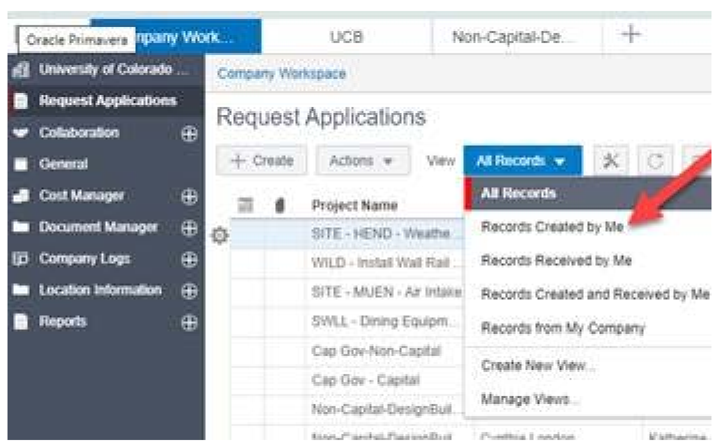
1. **Receive** the request to create a new project.

   Note: The trigger to create a new project can come in from the Service Request or internally.

2. **Create** the PR number in FAMIS prior to the Request Application in Unifier.
3. **Navigate** to Company Workspace> Request Applications.



4. Optionally, **select** the “View” drop down at the top of the screen and change to Records Created by Me.



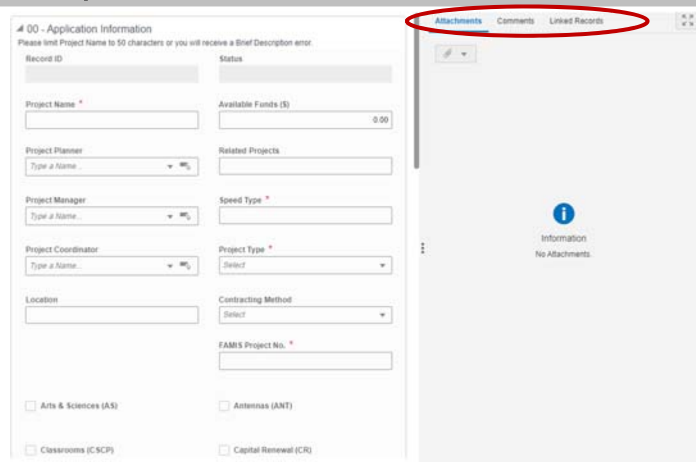
Action By: Project Coordinators	Example

5. **Select** “Create”.
6. **Enter** all currently known information.
   a. Note red asterisked fields are required.
   b. Add any Attachments, Comments or Linked Records.
7. **Select** all Project Attributes that apply.
8. **Enter** delivery type if known. If not known, leave blank.

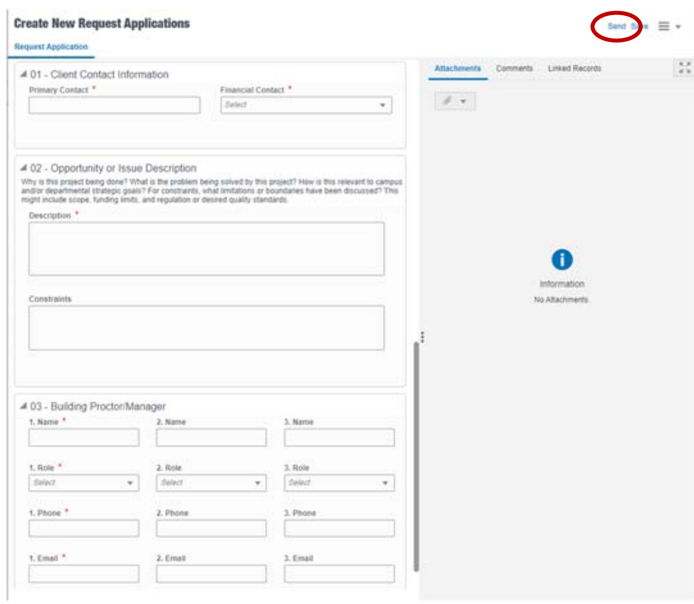
   Note: Project Name must be less than 50 characters. An error message will occur if the limit is exceeded.

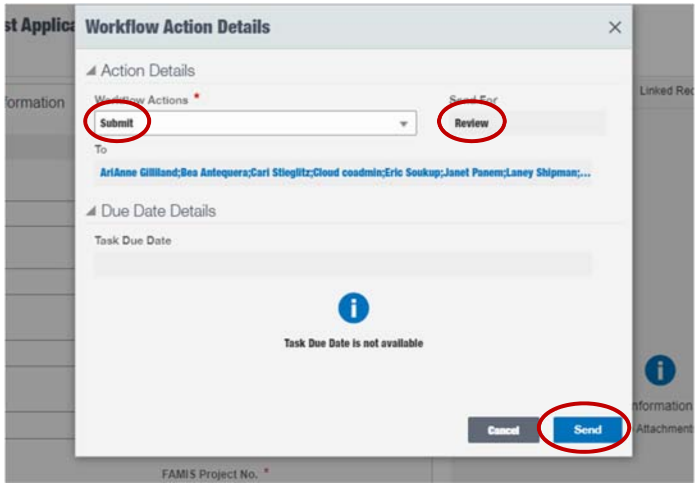
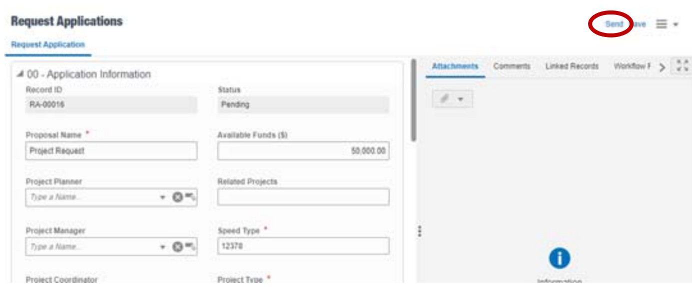
   Note: Project Name cannot contain any special characters e.g. #,?, /.

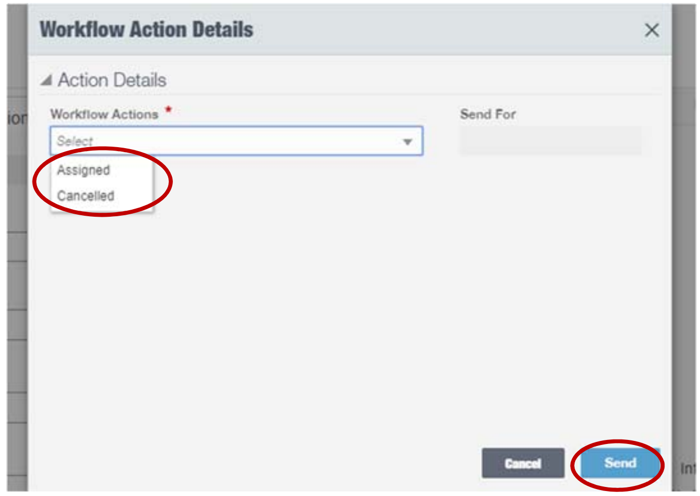
   Note: Enter delivery type if known. If not known, leave blank.



9. In 02 - Opportunity or Issue description, **enter** the problem or issue you are trying to solve and any known constraints or issues.
10. In 03- Building Proctor/Manager, **enter** the main contact as the red asterisked contact.
    a. Optionally **add** additional contacts.
11. **Select** “Send” to open the Workflow Action Details screen and initiate the workflow.



Action By: Project Coordinators	Example
12. In the Workflow Action Details screen, **note** “Submit” is pre-selected as the only Workflow Action available. 13. **Note** that you will be reviewing the request application in the next step. This is your chance to review the data prior to project creation. 14. **Select** “Send”.	
15. **Open** the record (by double-clicking) and select “Accept” to start editing.	
16. **Review** information entered. Validate: a. Project name is the same as FAMIS. b. All other information is correct. 17. **Select** “Send” to open Workflow Action Details screen.	

Action By: Project Coordinators	Example
18. In the Workflow Action Details screen **select** "Assigned". Note: This is a terminal step for the request. Terminal means it cannot be changed or altered after this point. Note: At this point FM-IT receives notification to create the project shell. a. Optionally, **select** "Cancelled". This is also a terminal step for the request Note: "Cancelled" is used if the Request Application will not be moved into workflow or was entered in error. 19. **Select** "Send". 20. **Wait** 1-2 days to validate the project was created. If not created, contact FMIS.	

END TASK

2.1.2 PREPARING PROJECT STATUS FOR CAP GOV (UPDATED: 3/10/2020)

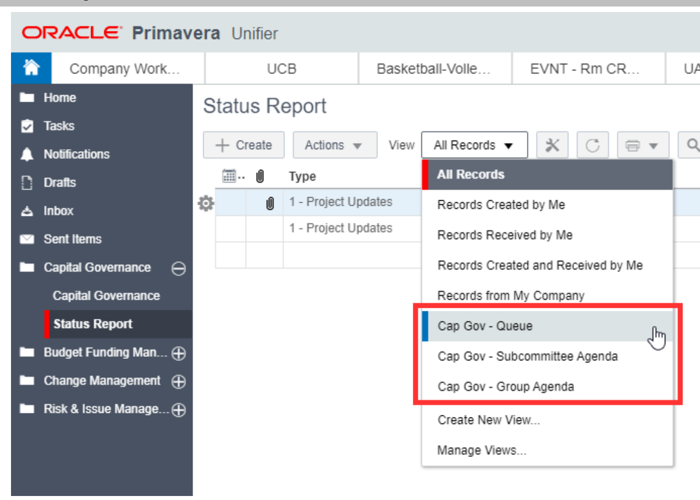
Goals	How to prepare project status updates in preparation for a Capital Governance review meeting.
Navigation	Home>Capital Governance>Status Report
Action By	Asst VC PD&C
Pre-requisites	Status Report reviews sent for review by the individual projects. Task is received.
Related Files	2.1.3 Completing Capital Governance Review Meetings 3.10.5 Preparing Project Status Updates

Action By: Asst VC PD&C

1. **Navigate** to the Home screen and select Capital Governance>Status Report.
2. **Select** the appropriate view from the View pull-down.
   a. Cap Gov-Queue: These are Status Reports that are in the queue to review to be promoted to the agenda for the next meeting, sent back for revision, for put on hold for a future meeting.
   b. Cap Gov-Subcommittee Agenda: Updates that have been promoted to the agenda for the Subcommittee Agenda to be updated with the decision from the Subcommittee Agenda.
   c. Cap Gov-Group Agenda: Updates that have been promoted to the agenda for the Group Agenda to be updated with the decision from the Group Agenda.
3. **Note** the available items that have been promoted for Cap Gov Review are sorted by Type (Project Update, Space Optimization, etc.), Phase, then Name.

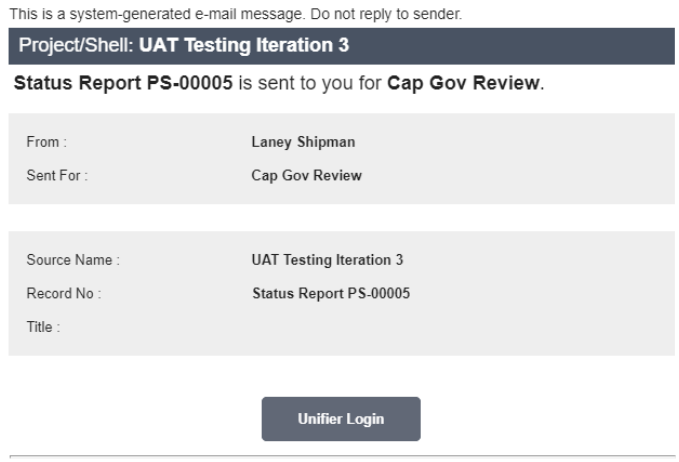
Note: Asst VC will manage the queue and update the decision from the Capital Governance meetings.

Example



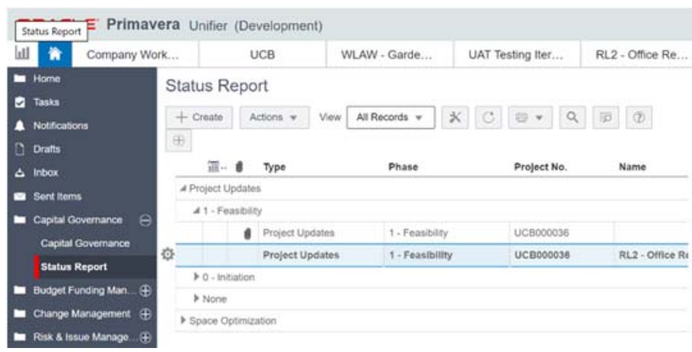
Action By: Asst VC PD&C	Example

4. Optionally, the Asst VC PD&C will **receive** an email notification when a Status Report record is sent for "Cap Gov Review" and can start updating via the email.

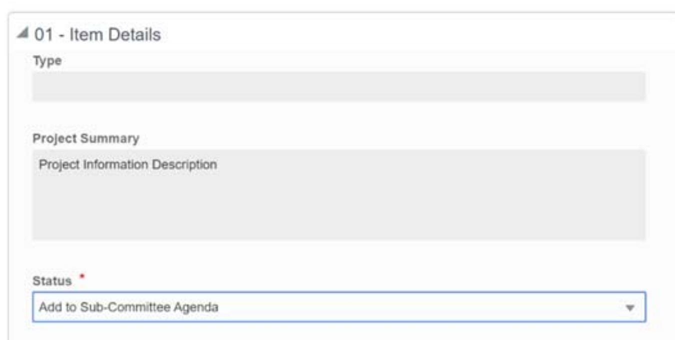


5. **Locate and open** the project status report record that needs to be reviewed. (either from the view or from the email)
6. **Select** "Accept" to start reviewing and editing the content.

   Note: Only accept the task if you are going to act on the record. The record can be viewed without accepting.

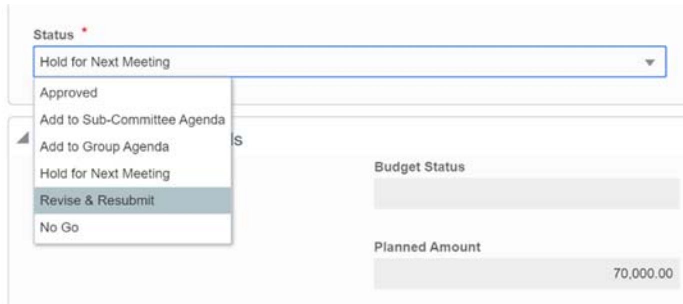


7. In 01 – Item Details, **note** that a decision on this status being included in the next Capital Governance meeting is needed.
   a. If unsure of decision, complete the remaining steps and then return to this screen for a final decision.

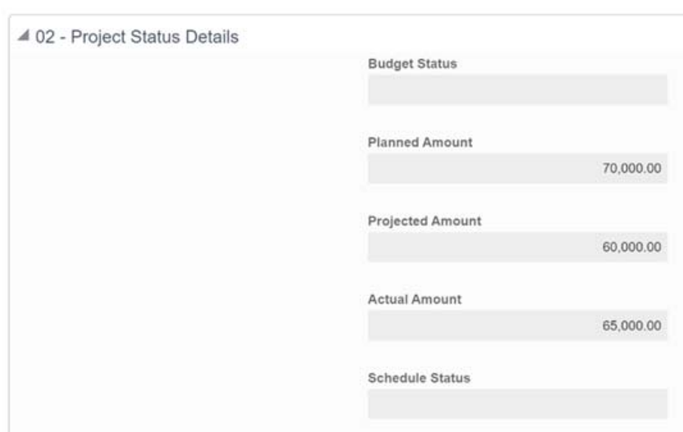


Action By: Asst VC PD&C	Example

8. Select the Status:
    a. “Approved” will route it to End with an action of Approved but will not include in a Cap Gov Review.
    b. “Add to Sub-Committee Agenda” will route back to Cap Gov Review with an action of Hold for Update. The record now appears in Sub-Committee Agenda view.
    c. “Add to Group Agenda” will route back to Cap Gov Review with an action of Hold for Update. The record now appears in Group Agenda view.
    d. “Hold for Next Meeting” will not include it in this agenda. The Project team will not be able to make updates to the record.
    e. “Revise & Resubmit” will route it to Revisions, where Project Manager, Project Coordinator, and Planner will accept the task and choose to Resubmit or Cancel the record.
    f. “No Go” will route it to End with an action of No Go.

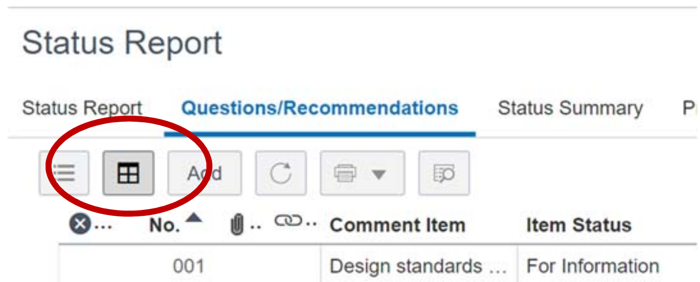


9. **Review** the project status and budget set by the project team.



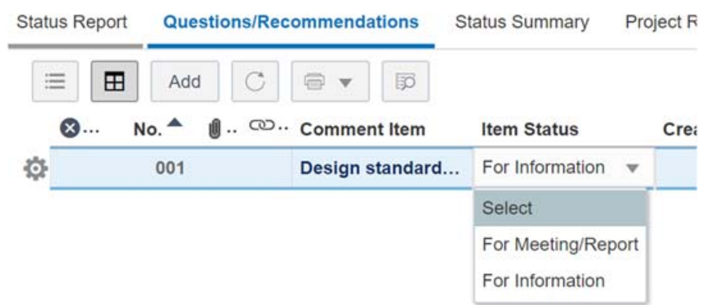
Action By: Asst VC PD&C	**Example**

10. **Select** the “Questions / Recommendations” tab from the top.
11. **Pick** the “Grid View” icon to switch to grid view.



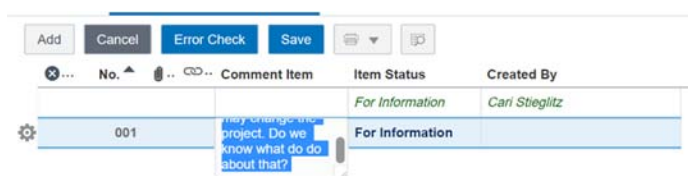
12. **Review** the item that was entered by the project team.
13. **Double-click** on the item to open it for editing.
    a. If no changes, change the Item Status from “For Information” to “For Meeting/Report”.

    Note: Terminology that includes for report means this item should show up on a report.

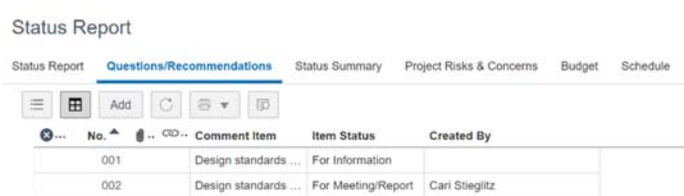


14. If changes are needed, do not modify the line item from the project team except to change the status to “For Information”. This will remove it from the Cap Gov report.
15. **Select** “Add” and copy the text from the first item into the new item and edit.

    Note: DO NOT choose “Copy”. This will show the line item as being created by the project team.

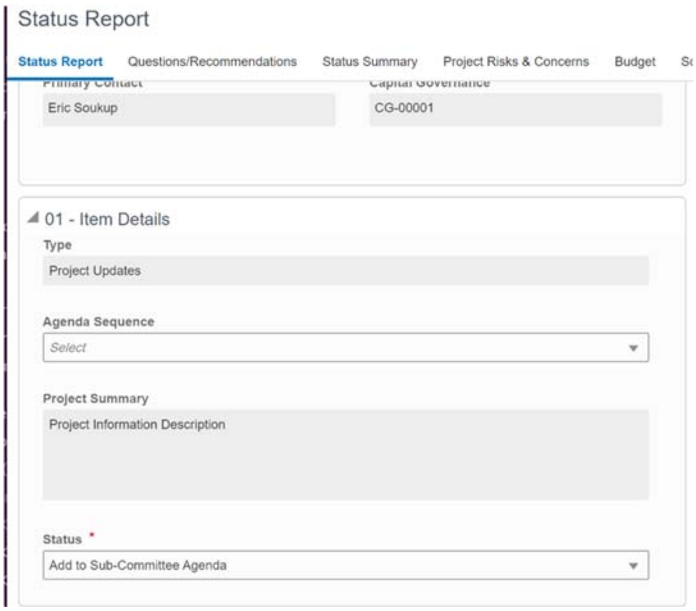


16. **Edit** and **add** remaining line items for each of the tabs along the top:
    a. Questions / Recommendations
    b. Status Summary
    c. Project Risks & Concerns
    d. Budget
    e. Schedule

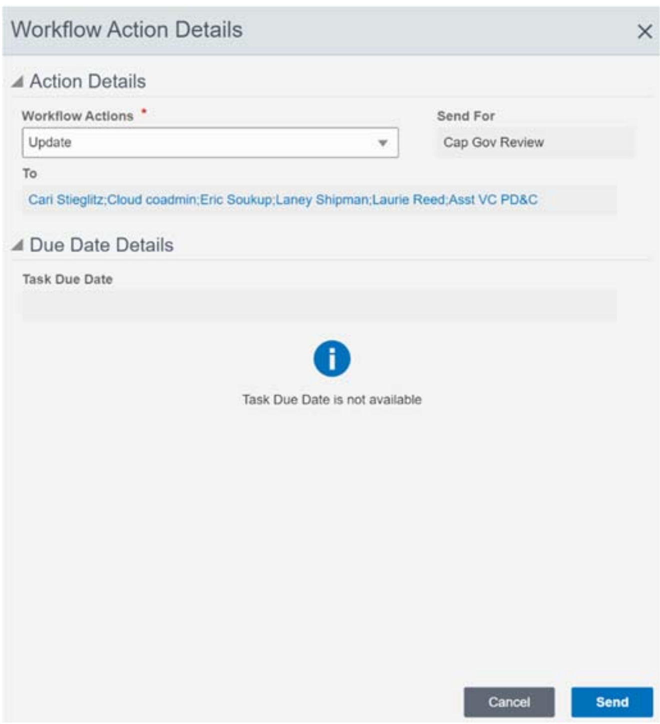


Action By: Asst VC PD&C	Example

17. If needed, **edit** your response under Status Report > 01 – Item Details to change how this status is routed.
18. **Select** “Send” to open the Workflow Action Details screen.



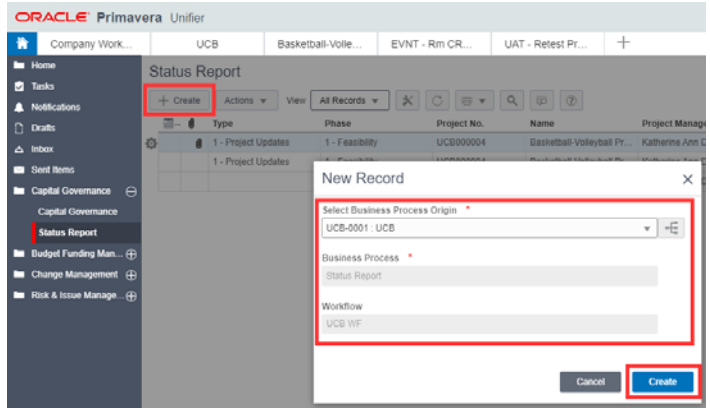
19. In the Workflow Action Details screen, note the next step is automatically selected based on the Status in the step above.
20. **Select** “Send”.



21. **Continue** updates to the status as the project gains results and outcomes from meetings.

Action By: Asst VC PD&C | **Example**

22. To add other agenda items to an agenda, such as Space Optimization or Real Estate Services, **select** “Create”.
23. **Validate** that the Business Process Origin is UCB, then **select** “Create”. (See 3.10.5 Preparing Project Status Updates for more information if needed.)



END TASK

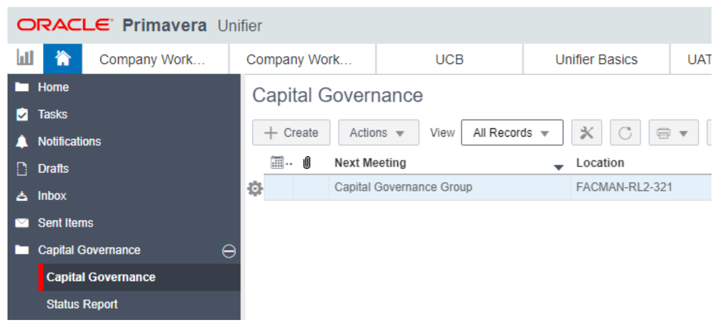
2.1.3 COMPLETING CAPITAL GOVERNANCE REVIEW MEETINGS (UPDATED: 3/10/2020)

Goals	How to create the agenda and document results from the cap gov review meeting.
Navigation	Home>Capital Governance>Capital Governance
Action By	Asst VC PD&C
Pre-requisites	Project status is reviewed and clarified prior to the meeting.
Related Files	3.5.1 Creating Agenda and Meeting Minutes 3.10.5 Preparing Project Status Updates

Action By: Asst VC PD&C	Example

1. **Navigate** to Home>Capital Governance>Capital Governance.
2. **Complete** all open tasks for project status workflows prior to the review meeting (See 2.1.2 Preparing Project Status for Cap Gov if needed).
3. **Review** the list of all Status Report records sent to the agenda.
    a. If additional items needed for non-Project Updates**, create** additional items under Home>Capital Governance>Status Report.
4. **Open** the record and select “Accept” to update information.

    Note: There will only be one Capital Governance record.



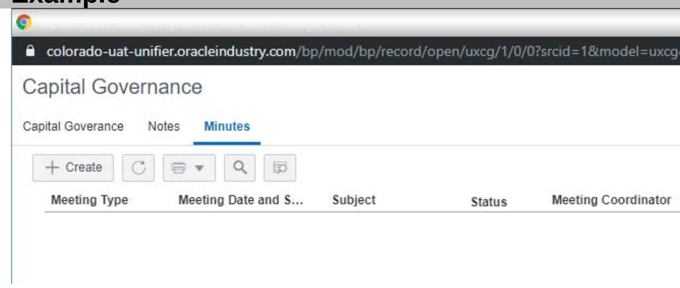
5. In 01 – Next Meeting Information, **update** data for scheduled meeting:
    a. Type: What is the type of the meeting scheduled next?
    b. Location: Where will the meeting be held?
    c. Date / Time: When will the meeting be held.
    d. Comments: Any notes or comments for what should be covered at the next meeting generically, note that you can include additional items on the next step.

Action By: Asst VC PD&C	Example

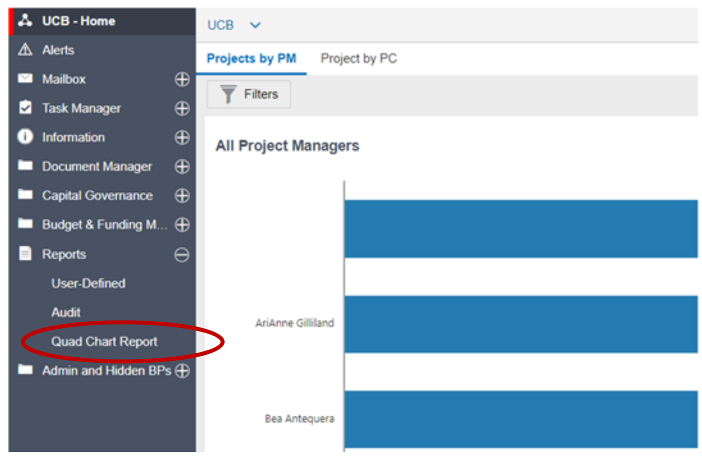
6. **Select** the "Minutes" tab. Use this to create and record meeting minutes for the Subcommittee or Group Meeting.

   Note: If minutes are captured outside of Unifier, they can be entered here after the fact. **(See** Section 03, 3.5.1 Creating Meeting Agenda and Minutes for more information if needed.)

   i. **Select** "Create" if an agenda for this meeting has not already been started.



7. **Navigate** to UCB>Reports>Quad Chart Report and open the report.

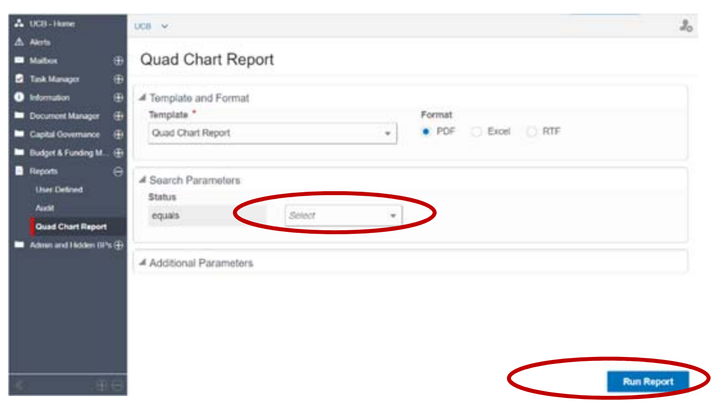


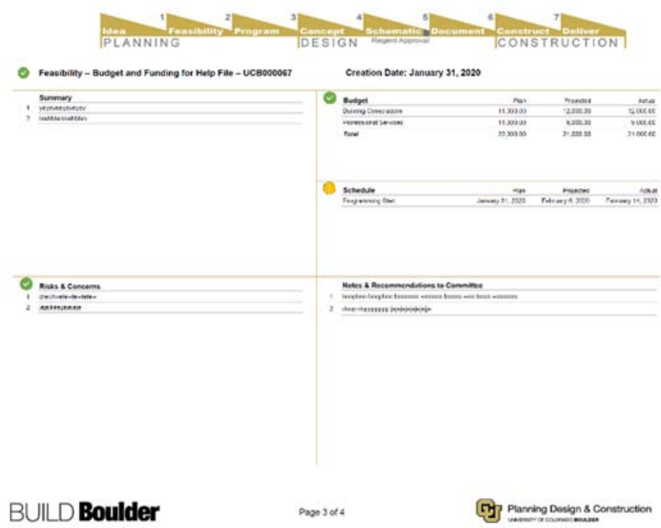
8. **Select** the meeting purpose to filter quad charts for the specific meeting.

   a. **Ensure** PDF is selected as the output format.

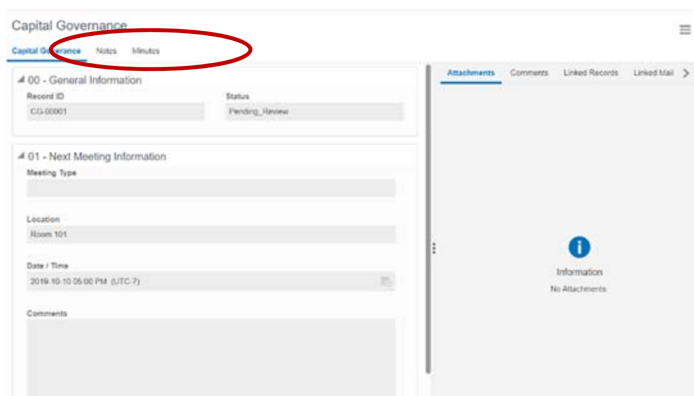
   b. **Select** "Run Report".

   c. **Print** Quad charts for inclusion in meeting.



Action By: Asst VC PD&C	Example
9. **Proof** the Quad Chart PDF to ensure all projects are ready for review.	

10. **During** meeting, use agenda and reports to capture notes on results.
11. **Select** the “Minutes” tab and open the Meeting Minutes record previously created.
12. **Accept** the task and update as needed. (See Section 03, 3.5.1 Creating Meeting Agenda and Minutes for more information if needed.)



13. **After** the meeting, captures key decisions, action items and issues.
14. **Returns** to individual project status reports to document decisions. **(See** 2.1.4 Recording Decisions of Cap Gov Meetings for more information if needed.)
15. **Repeat** process for each upcoming meeting.

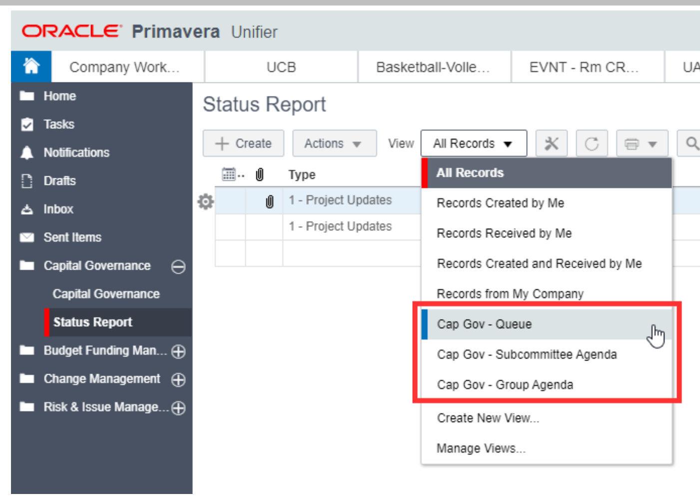
END TASK

2.1.4 RECORDING DECISIONS OF CAP GOV MEETINGS (UPDATED: 2/24/2020)

Goals	How to capture the decisions made for each project as an output from the Cap Gov meeting.
Navigation	Home>Capital Governance>Status Report
Action By	Asst VC PD&C
Pre-requisites	Project was reviewed as part of the Cap Gov meeting.
Related Files	2.1.3 Completing Capital Governance Review Meetings

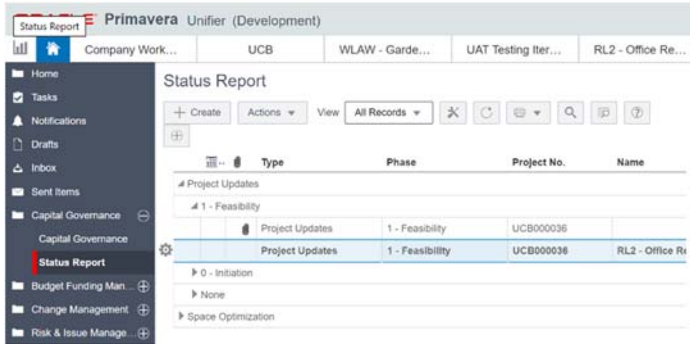
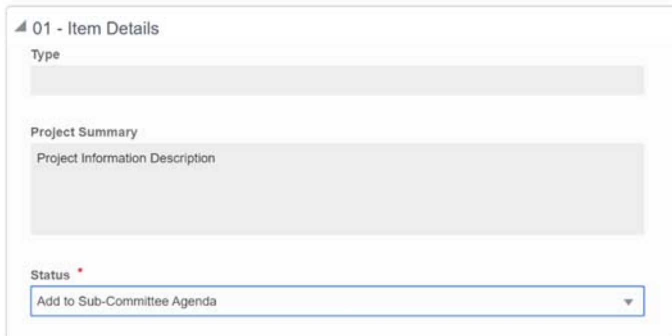
Action By: Asst VC PD&C | **Example**

1. **Navigate** to the Home screen and select Capital Governance>Status Report.



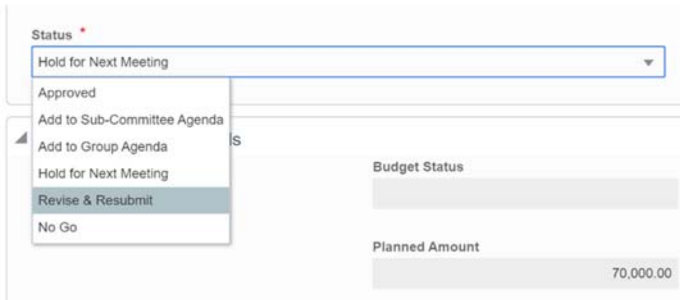
2. **Select** the appropriate view from the View pull-down based on the meeting that was just completed.
    a. <u>Cap Gov-Queue</u>: These are Status Reports that are in the queue to review to be promoted to the agenda for the next meeting, sent back for revision, for put on hold for a future meeting.
    b. <u>Cap Gov-Subcommittee Agenda</u>: Updates that have been promoted to the agenda for the Subcommittee Agenda to be updated with the decision from the Subcommittee Agenda.
    c. <u>Cap Gov-Group Agenda</u>: Updates that have been promoted to the agenda for the Group Agenda to be updated with the decision from the Group Agenda.
3. **Note** the available items that have been promoted for Cap Gov Review are sorted by Type (Project Update, Space Optimization, etc.), Phase, then Name.

    Note: Asst VC will manage the queue and update the decision from the Capital Governance meetings.

Action By: Asst VC PD&C	Example
4. **Locate and open** the project status report record that needs to have the decision captured. 5. **Select** “Accept” to start reviewing and editing the content.	
6. In 01 – Item Details, **note** that the status reflects the meeting that was just completed.	

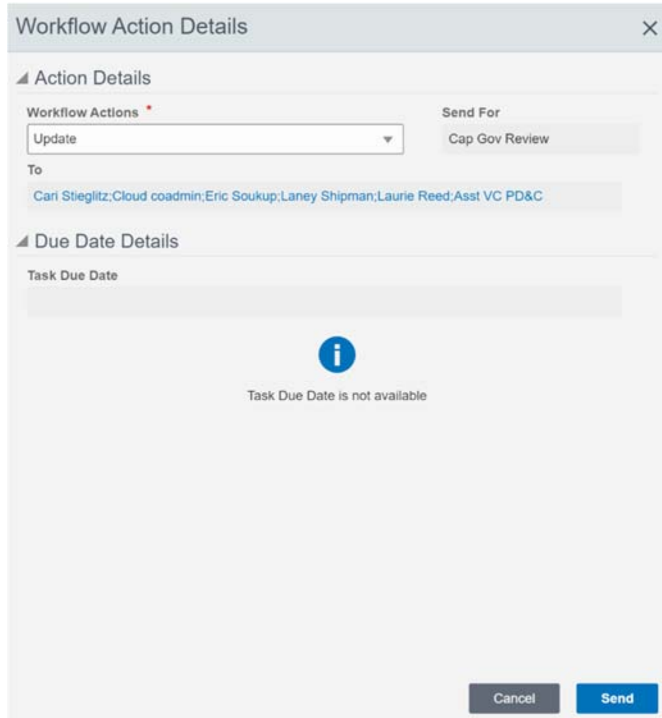
Action By: Asst VC PD&C	Example

7. **Update** the Status:



   a. "Add to Sub-Committee Agenda" – Record is routed back to Cap Gov Admin, however, now appears in Sub-Committee Agenda view
   b. "Add to Group Agenda" – Record is routed back to Cap Gov Admin, however, now appears in Group Agenda view
   c. "Revise & Resubmit" – Record is routed back to creator (PM/PC/Planner) to revise and resubmit
   d. "No Go" – Record is routed to End step with notification to creator
   e. "Approved" – Record is routed to End step with notification to creator
   f. "Hold for Next Meeting" – Record is routed back to Cap Gov Admin and remains in the Queue view

8. **Select** "Send" to open the Workflow Actions Detail screen.

Action By: Asst VC PD&C	Example
9. In the Workflow Action Details screen, **note** the next step is automatically selected based on the Status in the step above. 10. **Select** "Send".	 END TASK

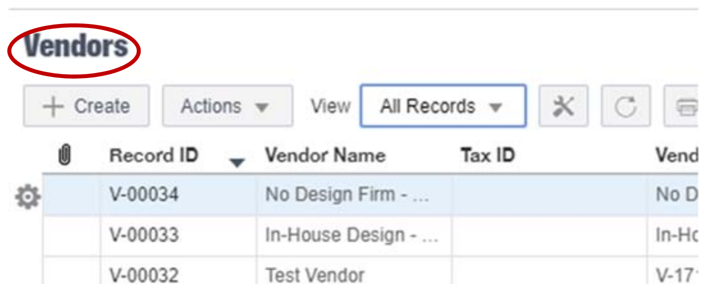
2.1.5 ADDING VENDORS MANUALLY (NOT ALREADY IN UNIFIER) (UPDATED: 2/18/2020)

Goals	Learn how to add vendors not in Unifier
Navigation	Company Workspace>Company Logs>Vendors
Action By	D&C Program Coordinator / Company Administrators
Pre-requisites	Vendor not found in Vendor List.
Related Files	None.

Action By: Prog Coord / Company Admin	Example

1. **Navigate** to Company Workspace>Company Logs>Vendors.
2. **Search** for the Vendor to ensure they don't exist already.
3. **Open** the Marketplace record to see the Vendor information.
4. **Select** "Create".

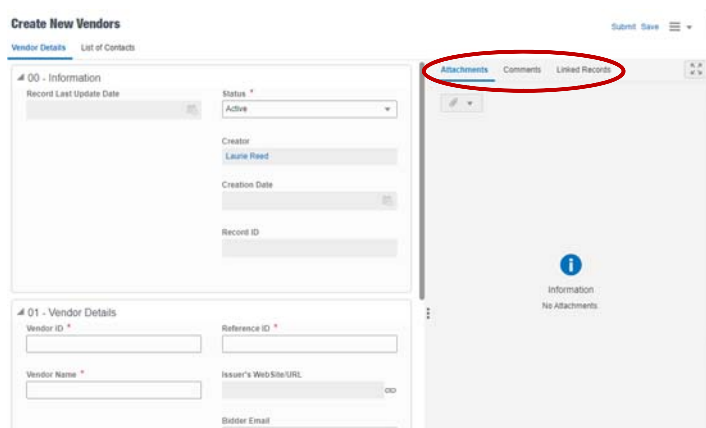
   Note: A subset of Vendors have been imported into the system from Marketplace. This process is to manually add a vendor not already in the system.



5. **Enter** all currently known information that was provided as part of the new Vendor request including:
   a. 00 – Information
   b. 01 – Vendor Details

   Note: Vendor ID is the same as the Vendor # in Marketplace.

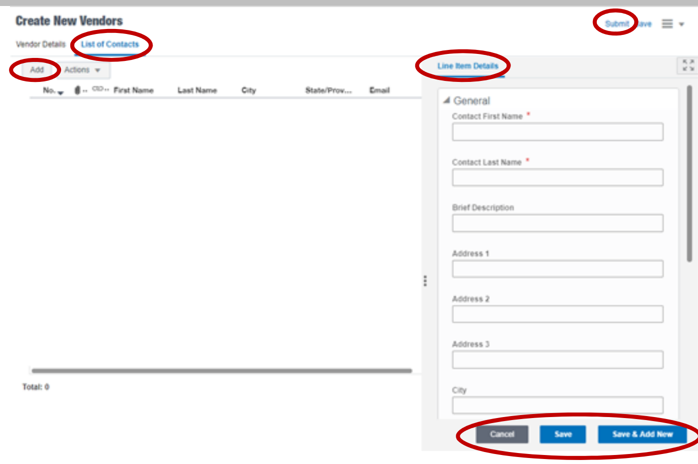
   c. 02 – Vendor Address
   d. 03 - Remarks
6. **Note** red asterisked fields are required.
7. **Add** any Attachments, Comments or Linked Records.



Action By: Prog Coord / Company Admin	Example

8. Additional contact(s) can be added to the record via List of Contacts.
9. **Select** “Add”.
10. **Enter** all currently known information in Line Item Details fields.
11. Select “Save” to save current entry.
    a. Optionally, **select** “Save & Add New” to save current entry and add another contact.
    b. Optionally, select “Cancel” to cancel current unsaved entry.
12. Select “Submit” to save the Vendor record.

Note: At any time, Vendor information can be updated by opening the record and selecting “Edit”. Once done, select “Submit” again to publish the changes.



END TASK

BUILD **Boulder**

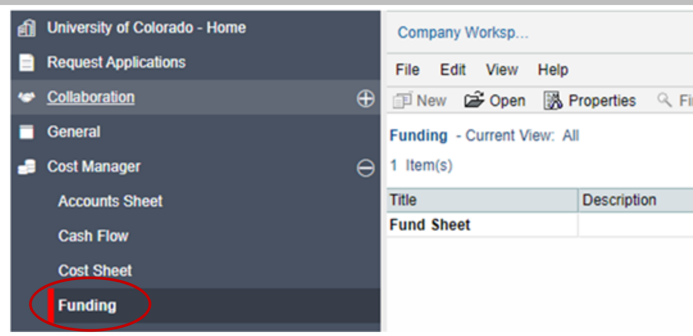
2.2 PORTFOLIO FUND MANAGEMENT

2.2.1 VIEWING FUNDS AT THE PORTFOLIO LEVEL (UPDATED: 10/24/2019)

Goals	View all funding and status of funding at a portfolio level.
Navigation	Company Workspace>Cost Manager>Funding
Action By	Finance, All Project Users
Pre-requisites	None.
Related Files	None.

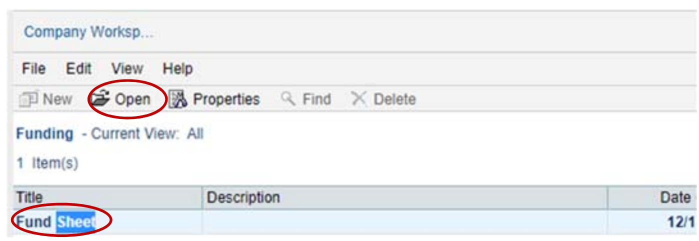
Action By: Finance, All Project Users | **Example**

1. **Navigate** to Company Workspace>Cost Manager>Funding

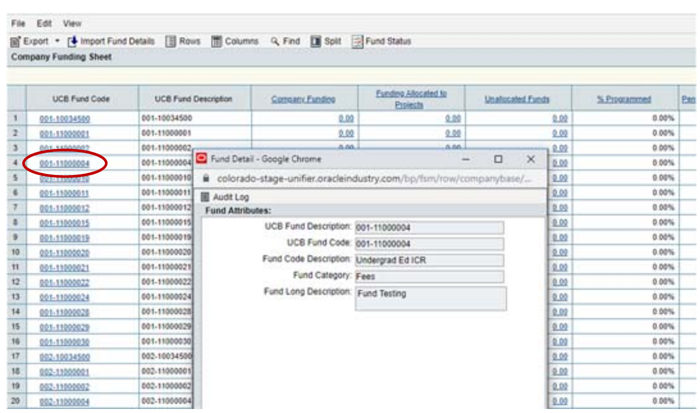


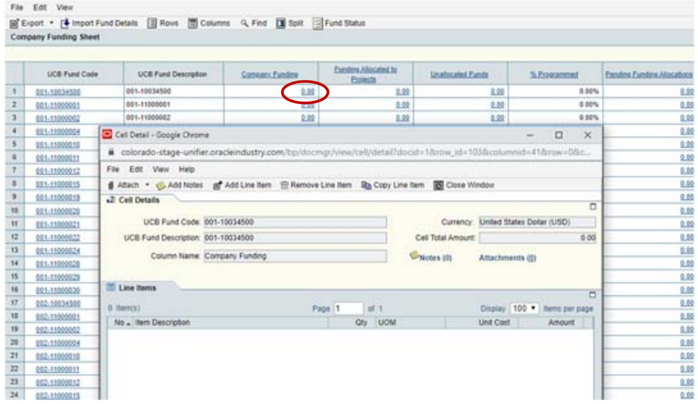
2. **Double-Select** Fund Sheet to open or Select the Open icon.

   Note: Only Finance or Unifier Admins can edit this sheet. All others can view and drill into details.



3. **Scroll** columns along the top to see status on different funds.
4. **Select** on the column name to see how this is calculated.
5. **View** Fund Detail by Selecting on the UCB Fund Code link. A fund detail window will open.



Action By: Finance, All Project Users	Example
6. Status of funds is available by **Selecting** the link under the heading you wish to view.	 END TASK