

## COMPLETED EXAMPLE

### PMM Interactive Flow

Project Charge Document (M101)

#### 1. Project Information

<b>Project Name:</b>	PMM Interactive Flow	<b>PlanView Number:</b>	
<b>Project Sponsor:</b>		<b>Project Size:</b>	
<b>Project Director:</b>		<b>Project Start Date:</b>	9/19/07
<b>Project Manager:</b>	Cristine Little	<b>Project End Date:</b>	12/17/07

#### 2. Project Leads

Lead Name	Division	Unit
Lynne Pavesi	MAIS	SS Knowledge Support
Cristine Little	MAIS	Internal Svs Project Support

#### 3. Project Statement

Project Area	Description
Background:	Encourage all MAIS employees to utilize the Project Management Methodology and Templates. The goal is improving the documentation and applying the MAIS – Knowledge Support award winning documentation approach.
Objective:	Convert existing documents, templatize 40 forms and make flow interactive. The PMM templates will be accessed in two ways, via the new interactive process flow and the existing resource list by PMM phase.
Scope:	We are changing only the format, and content changes will be limited to the addition of the new post project executive summary, and the combination of separate instruction docs and separate forms into one single templated document which will include instructions. MAIS will use this as documents for people outside of the PM role where they can easily follow and execute. Format has to be interactive; we will “templatize” all forms. We will attempt to more closely adhere to the U of M Standards by using the M in lieu of the seal.
Included in scope:	Converting existing PMM documents to templates. Converting current Visio PMM flow to interactive, hyperlinked flow. Converting the current Methodology Maintenance Visio flow to interactive, hyperlinked flow and communication. Creation/addition of the new Post Project Executive Summary.
Excluded from scope:	Converting existing PMM documents to templates. Converting current Visio PMM flow to interactive, hyperlinked flow. Converting the current Methodology Maintenance Visio flow to interactive, hyperlinked flow and communication. Creation/addition of the new Post Project Executive Summary.

Project Area	Description
Impacts: (Organizational & Technical)	Implementing the interactive version of the PMM Flow will increase the availability of proper templated forms and ease of use MAIS wide.
Dependencies:	None at this time.
Assumptions & Constraints:	None at this time.

#### 4. High-level Requirements

Requirement Area	Projected Steps/Comments
Templatize Forms (approx 40)	<ul style="list-style-type: none"> <li>• Create</li> <li>• Review</li> <li>• Approve</li> </ul> <p>We are changing only the format, and content changes will be limited to the addition of the new post project executive summary, and the combination of separate instruction docs and separate forms into one single templated document which will include instructions. Format has to be interactive; we will “templatize” all forms. We will attempt to more closely adhere to the U of M guidelines by using the yellow M logo in lieu of the University seal.</p>
Process Flow Diagrams for PMM and Methodology Maintenance	<ul style="list-style-type: none"> <li>• Review Existing Workflow</li> <li>• Design Workflows</li> <li>• Create in Visio</li> <li>• Review / Approve Workflows</li> <li>• Add Links</li> <li>• Test / Review / Approve</li> </ul>
Website Development	<ul style="list-style-type: none"> <li>• Using Approach M1000A Doc</li> <li>• Design Front Page for Web Site</li> <li>• Keep existing resource list by phase</li> <li>• Review / Approve Design</li> <li>• Create Website</li> <li>• Test / Review/ Approve</li> </ul>
Job Aid	<ul style="list-style-type: none"> <li>• Create Snapshot “How To” document</li> <li>• Review / Approve</li> </ul>
Publishing	<ul style="list-style-type: none"> <li>• Put it all together</li> <li>• Test</li> <li>• Review / Approve</li> </ul>
Communication	<ul style="list-style-type: none"> <li>• TBD - Myron</li> </ul>

#### 5. High-level Deliverables

Deliverable Type	Description
<p>Note: Identify each type as either Business Process or Project Management.</p>	
Business Process	<ul style="list-style-type: none"> <li>• Templated Forms (There are approximately 40 documents that will need to be re-created as Templates that include Instructions and “examples” if applicable)</li> <li>• PMM interactive (hyperlinked) process flow</li> <li>• Methodology Maintenance Interactive flow</li> <li>• Website Front Page</li> <li>• Existing Resource List by Phase</li> <li>• Job Aid</li> </ul>

<b>Deliverable Type</b> Note: Identify each type as either Business Process or Project Management.	<b>Description</b>
Project Management	M101 - Project Charge M102 - Project Plan/Schedule (time reporting task(s)) M107 – Project Roles & Responsibilities and Training M135 - Project Status Reports (in Lotus Notes DB) M192 – Post Project Checklist

## 6. High-level Timeline

<b>Milestone/Comments</b>	<b>Target Date</b>	<b>Date Achieved</b>
There is an expectation that this small project can be completed within 2 - 3 months.		
Kick-Off Meeting	9/19/07	9/19/07
Define Requirements	9/27/2007	9/24/07
Level of Effort Estimates	10/1/2007	9/24/07
Create Templates	10/22/07	
Review Templates	10/29/07	
Create Interactive Flows	11/14/07	
Review Interactive Flows	11/19/07	
Create Website	12/5/07	
Review Website	12/12/07	
Create Job Aid	11/19/07	
Review Job Aid	11/20/07	
Publish	12/14/07	
Communication	12/17/07	

## 7. High-level LOE Estimates

<b>Description of Effort</b>	<b>Estimated # Hours across # Days to Complete</b>	<b>Comments</b>
Define Launch Plan	104h/4d	
Templatize Forms	224h/27.5d	
Create Process Diagram for PMM Methodology	128h/12d	
Create Process Diagram for Methodology Maintenance	40h/7d	
Job Aid Development	24h/3d	

Description of Effort	Estimated # Hours across # Days to Complete	Comments
Web Site Development	88h/9d	
Publishing	44h/3.5d	
Communication	40h/58.5d	

## 8. Project Team

Project Groups	Division/Units Represented
Core Group(s):	MAIS Project Support MAIS Knowledge Support
Subject Matter/Expert(s):	MAIS Project Support
Technical Expert(s):	MAIS Project Support
Other(s) (please describe):	

Steering Committee Member Name	Division/Units Represented
Cathy Curley	MAIS Shared Services, ISPS
Myron Hepner	MAIS Shared Services, Performance Support

## 9. Project Status Reports

<b>Status Report Owner:</b>	Cristine Little
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<b>Status Report Audience:</b>	Lynne Pavesi	Laurie Herman
	Eric Fruth	

**Document Change Control  
Project Charge Document (M101)**

Version Number	Date	Revision Author	Description
1.0	9/26/07	SS-KS	Draft new template format (archived original format available via document owner)

*This document is owned and maintained by MAIS Shared Services, Project Support. Any changes to template format and content must adhere to departmental document change standards.*