

# Main Screen

## Project Information

The screenshot displays a Microsoft Excel spreadsheet titled "PMM Toolkit.xls [Compatibility Mode] - Microsoft Excel". The ribbon includes Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, FlowBreeze, and Search Commands. The spreadsheet content is as follows:

	A	B	C	D	E	F	G	H	I	J	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD		
1	Project Management Methodology																														
4				Agency/Org.	<input type="text"/>																										
6				Agency Org #	<input type="text"/>																										
8				Department	<input type="text"/>																										
10				Department Org #	<input type="text"/>																										
12				OCIO Project #	<input type="text"/>																										
14				Project Name	<input type="text"/>																										
16				Prepared By	<input type="text"/>																										
18				E-mail	<input type="text"/>																										
20				Phone #	<input type="text"/>																										
22				Project Sponsor	<input type="text"/>																										
24				Project Manager	<input type="text"/>																										
26				E-mail	<input type="text"/>																										
28				Phone #	<input type="text"/>																										
30				Team Members	<input type="text"/>																										
38				Project Start Date	<input type="text"/>																										
41				Project Due Date	<input type="text"/>																										
43				Date of Last Revision	<input type="text"/>																										

The status bar at the bottom shows "Ready", "Project Information", "Main Menu", "Plan Updates", "Template Inventory", and "85%".

## Main Menu Screen

# Project Management Methodology (PPM)

## Main Menu

**Project Name:** \_\_\_\_\_  
**OCIO Project #:** \_\_\_\_\_  
**Department:** \_\_\_\_\_

Click on the section that you would like to complete.

Initiating

Planning

Executing

Closing

Acronyms

Note: To reset opening any of the Phase links, simply click on the Main Menu sheet tab and all sheets will close.

# Project Update Screen

PMM Toolkit.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer FlowBreeze Search Commands

Cut Copy Paste Format Painter Clipboard Font Alignment Number Styles Cells Editing

Normal 2 Normal\_Exc... Normal\_1\_P...  
Normal Bad Good

AutoSum Fill Clear Sort & Filter Find & Select

E72 fx

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 Top of the Page  
2 Clear Entries  
3 Print Worksheet  
4 Copy Responses  
5 Acronyms  
6 Inventory

Project Name:   
OCIO Project #:   
Department:   
Revision Date:

## PMM Workbook Updates

**Updates**

PM PLAN Version	Date:	By Whom:
Plan Revision 1	Date:	By Whom:
Plan Revision 2	Date:	By Whom:
Plan Revision 3	Date:	By Whom:
etc.		

Sep 2011 Sep 2011

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Project Information | Plan Updates | Template Inventory

# PPM Template Inventory

Use the 34 pre-built documents to track and report on your project's lifecycle.

The screenshot displays the Microsoft Excel interface with the 'PMM Toolkit.xls' file open in Compatibility Mode. The ribbon shows the 'Home' tab with various formatting and editing options. The spreadsheet content is as follows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	<b>Project Name:</b> _____																								
2																									
3																									
4	<b>OCIO Project #</b> _____																								
5																									
6	<b>Department:</b> _____																								
7																									
8																									
9																									
10	<b>Instructions:</b> Click on any template's name to navigate directly to the appropriate worksheet.																								
11	Click on the inventory button to return to this list.																								
12	<a href="#">Acronyms</a>																								
13	<a href="#">Assumptions &amp; Risks</a>																								
14	<a href="#">Benefit Validation</a>																								
15	<a href="#">Communication Management Plan</a>																								
16	<a href="#">Complexity Assessment</a>																								
17	<a href="#">Contract Management Plan</a>																								
18	<a href="#">Control Management Plan</a>																								
19	<a href="#">Cost Management Plan</a>																								
20	<a href="#">Deliverable Acceptance Criteria</a>																								
21	<a href="#">Final Lessons Learned</a>																								
22	<a href="#">Formal Product Acceptance</a>																								
23	<a href="#">General Information</a>																								
24	<a href="#">Human Resources Management Plan</a>																								
25	<a href="#">High Level Project Org.</a>																								
26	<a href="#">Issue Log</a>																								
27	<a href="#">Maintenance &amp; Operation Plan</a>																								
28	<a href="#">Organizational Change Management Plan</a>																								
29	<a href="#">Organizational/Functional Stakeholders</a>																								
30	<a href="#">Post Implementation Evaluation Report</a>																								
31	<a href="#">PIER Costs - Last Approved</a>																								
32	<a href="#">PIER Costs - Actual</a>																								
33	<a href="#">PIER Costs - Comparison</a>																								
34	<a href="#">Procurement Management Plan</a>																								
35	<a href="#">Project Closure Checklist</a>																								
36	<a href="#">Project Management Plan Updates</a>																								
37	<a href="#">Project Priorities</a>																								
38	<a href="#">Quality Management Plan</a>																								
39	<a href="#">Risk Management Plan</a>																								
40	<a href="#">Schedule Management Plan</a>																								
41	<a href="#">Scope Change Request</a>																								
42	<a href="#">Scope Management Plan</a>																								
43	<a href="#">Sponsorship Commitment Survey</a>																								
44	<a href="#">Status Report</a>																								
45	<a href="#">Team Effectiveness (Disposition) Survey</a>																								
46																									
47																									
48																									
49																									
50																									
51																									
52																									
53																									

The spreadsheet also features a large yellow header area containing the following text:

**Project Name:** \_\_\_\_\_

**OCIO Project #** \_\_\_\_\_

**Department:** \_\_\_\_\_

**Template Inventory**

**Instructions:** Click on any template's name to navigate directly to the appropriate worksheet.  
Click on the inventory button to return to this list.

The list of templates includes:

- Acronyms
- Assumptions & Risks
- Benefit Validation
- Communication Management Plan
- Complexity Assessment
- Contract Management Plan
- Control Management Plan
- Cost Management Plan
- Deliverable Acceptance Criteria
- Final Lessons Learned
- Formal Product Acceptance
- General Information
- Human Resources Management Plan
- High Level Project Org.
- Issue Log
- Maintenance & Operation Plan
- Organizational Change Management Plan
- Organizational/Functional Stakeholders
- Post Implementation Evaluation Report
- PIER Costs - Last Approved
- PIER Costs - Actual
- PIER Costs - Comparison
- Procurement Management Plan
- Project Closure Checklist
- Project Management Plan Updates
- Project Priorities
- Quality Management Plan
- Risk Management Plan
- Schedule Management Plan
- Scope Change Request
- Scope Management Plan
- Sponsorship Commitment Survey
- Status Report
- Team Effectiveness (Disposition) Survey

# Opening Initiating Phase Documents

## Project Management Methodology (PPM)

### Main Menu

**Project Name:** \_\_\_\_\_  
**OCIO Project #:** \_\_\_\_\_  
**Department:** \_\_\_\_\_

Click on the section that you would like to complete.

- Initiating
- Planning
- Executing
- Closing
- Acronyms

Note: To reset opening any of the Phase links, simply click on the Main Menu sheet tab and all sheets will close.

## Project Management Methodology Initiating

**Project Name:** \_\_\_\_\_  
**OCIO Project #:** \_\_\_\_\_  
**Department:** \_\_\_\_\_

Click on the section that you would like to complete.

Project Charter

Issue Log

# Opening Initiating Phase – Project Charter

## Project Management Methodology

### Initiating

---

Project Name: \_\_\_\_\_  
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_

Click on the section that you would like to complete.

- Project Charter
- Issue Log

## Project Management Methodology

### Project Charter

---

Project Name: \_\_\_\_\_  
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_

Click on the section that you would like to complete.

- General Information
- Complexity Assessment
- High Level Project Org.
- Project Priorities
- Assumptions & Risks
- Organizational/Functional Stakeholders
- Project Charter Approvals

# Opening Initiating Phase – Charter General Information

## Project Management Methodology Project Charter

Project Name: \_\_\_\_\_  
 OCIO Project #: \_\_\_\_\_  
 Department: \_\_\_\_\_

Click on the section that you would like to complete.

- General Information
- Complexity Assessment
- High Level Project Org.
- Project Priorities
- Assumptions & Risks
- Organizational/Functional Stakeholders
- Project Charter Approvals

The screenshot shows the Microsoft Excel interface for the 'PMM Toolkit.xls' template. The 'General Information' section is highlighted in yellow and contains the following fields:

- Project Name: \_\_\_\_\_
- OCIO Project #: \_\_\_\_\_
- Department: \_\_\_\_\_
- Revision Date: \_\_\_\_\_

The spreadsheet is divided into sections with the following questions and text boxes:

- Background**: What is the business problem? The business problem is \_\_\_\_\_
- Objectives**: Briefly describe the benefits (tangible and intangible) of doing this project? The benefits of doing this project are: (list one benefit per line)
- Measurement**: What are the business consequences if this project is not done? The business consequence if this project is not done are \_\_\_\_\_
- Measurement**: What are the objectives of the project? (list one objective per line)

The left sidebar of the spreadsheet shows a table of contents with the following items:

- 1 Top of the Page
- 2 Links Entries
- 3 Print Worksheet
- 4 Copy Responses
- 5 Acronyms
- 6 Inventory
- 9 Spell Check
- 10 Objectives
- 11 Measurement
- 12 Solution
- 13 High Level Business Req.
- 14 Preliminary Scope Statement
- 15 Impact Assessment
- 19 Deadline
- 39 Background
- 41 Solution
- 42 Requirements Traceability
- 44 Preliminary Scope Statement
- 45 Impact Assessment
- 47 Deadline

# Opening Planning Phase Documents

## Project Management Methodology Planning

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Project Name: \_\_\_\_\_  
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_

Click on the section that you would like to complete.

- Project Management Plan
- Organizational Change Management Plan
- Maintenance & Operations Transition Plan



## Project Management Methodology Project Management Plan

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Project Name: \_\_\_\_\_  
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_

Click on the section that you would like to complete.

- Scope Management Plan
- Scope Change Request
- Configuration/Change Control Management Plan
- Human Resources Management Plan
- Communication Management Plan
- Risk Management Plan
- Cost Management Plan
- Quality Management Plan
- Schedule Management Plan
- Procurement Management Plan
- Contract Management Plan



## Opening Execution Phase Documents

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# Project Management Methodology

## Execution

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**Project Name:** \_\_\_\_\_  
**OCIO Project #:** \_\_\_\_\_  
**Department:** \_\_\_\_\_

Click on the section that you would like to complete.

Deliverable Acceptance Criteria/Customer Acceptance

Status Report

Sponsorship Commitment Survey

Team Effectiveness Survey

Benefit Validation

## Opening Closing Phase Documents

# Project Management Methodology Closing

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**Project Name:** \_\_\_\_\_  
**OCIO Project #:** \_\_\_\_\_  
**Department:** \_\_\_\_\_

Click on the section that you would like to complete.

Formal Product Acceptance

Project Closure Checklist

Post Implementation Evaluation Report

PIER Costs - Last Approved

PIER Costs - Actual

PIER Costs - Comparison

Final Lessons Learned

# Project Organizational Chart

PMM Toolkit.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer FlowBreeze Search Commands

Paste Cut Copy Format Painter Clipboard Font Alignment Number Styles Cells Editing

Project Name: \_\_\_\_\_  
OCIO Project #: \_\_\_\_\_  
Department: \_\_\_\_\_  
Revision Date: \_\_\_\_\_

## High Level Project Organizational Chart

```
graph TD; ES[Executive Sponsor] --- DC[Project Director]; SC[Steering Committee] --- DC; DC --- PM[Project Manager]; PM --- TM[Technical Manager]; PM --- BM[Business Manager]; PS[Project Support] -.- PM;
```

<< Previous Next >>

Project Information Main Menu Plan Updates Template Inventory High Level Project Org.

# Project Complexity Assessment

PMM Toolkit.xls [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer FlowBreeze Search Commands

Clipboard Font Alignment Number Styles Cells Editing

Project Name: \_\_\_\_\_

OCIO Project #: \_\_\_\_\_

Department: \_\_\_\_\_

Revision Date: \_\_\_\_\_

## Complexity Assessment

### Business Complexity

**Instructions:** On a scale of 0 - 5 - low to 4-high (0 = N/A), rate each applicable attribute and compute the Business Complexity by dividing the total by the number of items rated above zero. [Notes: Business and technical complexity will be computed automatically in this worksheet, using the ratings you enter. Move your pointer over each attribute cell, marked with a red triangle, to see a definition of the attribute.]

Low Complexity	Business Attribute	High Complexity	Rating
0	1	2	3
Static	Business rules	Changing	
Static	Current Business Systems	Changing	
Known and Followed	Decision Making Process	Not Known	
Low	Financial Risk to State	High	
Local	Geography	Agency wide	
Clear and Stable	High Level Requirements	Vague	
Few & Routine	Interaction with Other Departments and Entities	Many and New	
None	Impact to Business Process	High	
Few & Straight Forward	Issues	Multiple & Contentious	
High	Level of Authority	Low	
Clear	Objectives	Vague	
Established	Policies	Non-existent	
Minimal	Politics	High	
Familiar	Target Users	Unfamiliar	
Experienced	Project Manager's Experience	Inexperienced	
Experienced	Team	Inexperienced	
Loose	Time Scale	Tight	
Low	Visibility	High	
	Total:	0	
	Complexity:	0.0	

### Technical Complexity

**Instructions:** On a scale of 0-low to 4-high, rate each applicable attribute and compute the Technical Complexity by dividing the total by the number of items rated above zero. Use the definitions in the student notebook for clarity.

Project Information Main Menu Plan Updates Template Inventory Complexity Assessment PIER