

# **FINALIZED PROCESSES**

## **IT PMT PROCESS & TOOLS PROJECT**



**TEXAS DEPARTMENT OF PUBLIC SAFETY**

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# Meeting Invitations

## Introduction

DPS IT PMT project managers are responsible for ensuring effective communications for the projects they manage. Here is guidance on creating project meeting invitations for IT PMT projects.

### Timing

When sending an Outlook meeting invitation, plan to send the meeting invitation at least two business days in advance, to give attendees time to prepare.

### Meeting Invitation Header

Subject: <project name> project: <mtg name>

### Body of Meeting Invitation

Copy/paste the content below into the body of the email invitation and fill out.

### Meeting Purpose

{State in one or two sentences the overall purpose and objective of the meeting.}

### Meeting Preparation

{Provide instructions and list action items, including links, the attendees will need to complete or review prior to the meeting.}

- <instructions> <link #1>
- <instructions> <link #2>

### Agenda

Note: Hyperlink the agenda items to their location in the project SP site.

- Action item review: {In the meeting, you will be calling on assignees to provide a status update on their action items. List the names here or advise them prior to the meeting that they will provide an update; if they are unable to attend the meeting, they will need to send a proxy.}
- Project schedule
- Risks
- Issues
- Roundtable
- Next steps: Recap outstanding action items with owner and due dates

### Meeting deliverables

{List the desired out comes of the meeting, such as decisions, documents, and/or approvals.}

- <item #1>
- <item #2>
- <item #2>

{Your signature}

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# Meeting Management

## Introduction

DPS IT PMT project managers are responsible for ensuring effective communications for the projects they manage. Here is guidance on the meeting management process for IT PMT projects.

## Facilitation

The project manager is the meeting facilitator and is responsible for:

- Sending out meeting invitations, agendas, and related materials.
- Starting meetings on time.
- Taking notes and actions items during the meeting.
  - Use the IT PMT meeting minutes template for all project meetings.
  - In the meeting minutes, include the status of all items from the agenda along with new action items and the parking lot list.
- Updating project artifacts to reflect meeting decisions and action items during the meeting (if feasible; if not, then shortly after the meeting).
- Ending meetings on time.
- Conducting follow-up meetings as appropriate.
- Distributing meeting minutes within two days and tracking action items.
- Uploading meeting notes to the project SharePoint site in a timely fashion.
- Following up with assignees on outstanding action items to ensure they are completed in a timely manner.

## Protocol

- Use the IT PMT meeting invitation template for all project meetings.
- Make attendees feel welcome and engaged.
- If WebEx session was created for the meeting, dial in to it.
- Have and follow an agenda.
- Have the project SP site up during the meeting. Use and update the project schedule, logs, and registers real-time, during the meeting, to reflect discussions and decisions made.
- When presenting, do not jump ahead of the current slide. Speak at a moderate tempo; do not rush. Do not read from the slide; face the audience. Talk about the slide and give examples.
- Keep the meeting on track. Manage side conversations quickly. Manage heated discussions quickly, assertively, and respectfully.
- At least five minutes prior to meeting end time, wrap up the meeting. If discussion topics remain, advise attendees that remaining items will be addressed via email or by another session.

## Parking Lot

- Place in a Parking Lot those items not on the meeting agenda which merit discussion at another time.
- Document the owner tasked with following up on the item and timeframe if known.



## Requirements: Uses Cases - CID SSN Alias

### Follow-Up

- Distribute meeting minutes within two business days following the meeting. If possible, send them out the same day.
- Upload the meeting notes to the project SharePoint site.



## Meeting Minutes

### Introduction

DPS IT PMT project managers use Microsoft OneNote to take project meeting notes. Here is guidance on the IT PMT meeting minutes process.

### First time setup

- In OneNote, create a new workbook called **Project Meeting Notes**.
- Create a new Section (*tab at the top*) for each of the projects you manage.
- Create a project meeting notes template in OneNote, using the following content (copy/paste) and apply that template to each tab (*see bottom right of screen*):

-----

#### Meeting Purpose

- <state here>

#### Meeting Prep

- <state here & attach documents as appropriate>

#### Agenda

*Note: Hyperlink the agenda items below to their location in the project SP site.*

Review/update the following:

- Project Schedule
- Risks
- Issues
- Action Items
- Parking Lot
- Discuss next steps
- <item #1>
- <item #2>
- Roundtable
- Adjourn

#### Meeting Deliverables

{List the desired out comes of the meeting, such as decisions, documents, and/or approvals. Check off as they are completed in the meeting.}

- <item #1>
- <item #2>
- <item #2>

#### Meeting Notes

- <insert here>

- 
- **Note:** Don't forget to go to each Section/tab/project in OneNote and apply that template to each tab (*see bottom right of screen*).

#### Take meeting notes



## Requirements: Uses Cases - CID SSN Alias

- In OneNote, open the correct project/Section/tab and create a new page. A new page displays with the project meeting notes content.
- Click on the **Meeting Details** icon and select the meeting from the drop-down menu. The meeting details auto-populate.
- At the top, insert the meeting date (yyyymmdd) in front of the meeting name.
- Record the meeting notes in OneNote.
- Update the project SP site logs and registers as needed during the meeting.
- **Send out meeting notes**
- In OneNote, click **Email Page**. An email displays.
- Delete the first line that starts with “Link to meeting notes:”
- Modify the email using the template below, then send:

\*\*\*\*\*

**To:** <attendees>

**Cc:** <invitees who did not attend, plus others as appropriate>

**Subject:** <project name> - <XX/XX/XX> meeting minutes

-----  
Hello all –

Thank you for your participation in the following meeting: <meeting Subject>. Below are the meeting notes.

To see updated project artifacts (Action Items, Risk Register, Issue Log, project schedule, etc.), please go to the <project name> SP site. <Hyperlinked>

<Meeting notes auto-populated from OneNote here>

Thank you. Please let me know if you have any questions about this meeting.

<Your signature>

\*\*\*\*\*

### Upload meeting notes

- Upload the meeting notes email to the project SP site **Documents** library
- Select the **Monitoring and Controlling** document property
- Select keywords **Meeting Notes**



# PM Tasks & Deliverables by Phase

## Introduction

The Texas Department of Public Safety (DPS) Information Technology Project Management Team (IT PMT) is responsible for improving organizational success through professional project management services relating to non-Enterprise DPS projects. This document outlines the project management tasks and deliverables due for each phase of IT PMT projects which have been identified as non-enterprise.

## Initiation

### Inputs

- **Customer inquiry:** Email; phone call; customer is directed to the System Engineering (SE) team for the creation of a Needs Assessment.
- **Needs Assessment:** Can be used as content in creating the PPP-2A.
- **EPMO PPP-2A/Project Request:** Completed with IT assistance if necessary; helps determine whether project meets EPMO criteria. If identified as meeting non-EPMO project criteria, continue to Processes.
- **IT Business Case:** Serves as the IT Project Request; filled out by TRA, assisted by the PM.

### Processes

- **IPS Manager:**
  - Creates ITWR in JIRA.
  - Creates project SharePoint (SP) site and may upload pertinent documents if needed.
  - Creates associated record in the IT Initiatives SP site.
  - Adds project to SharePoint Project Scoring List.
  - Requests a Planview bucket charge code for the project and updates the IT Initiatives site once received.
  - Checks PM resource availability and makes project assignment decision.
  - Provides verbal and email assignment notification to project manager.
  - Checks technical requirements analyst (TRA) resource availability and makes project assignment decision.
  - Provides verbal and email assignment notification to TRA.
  - Pulls up the JIRA ticket, assigns it to the PM, then updates the record in the IT Initiatives site (JIRA automatically emails the assignment to the PM).
- **Project Manager (PM):**
  - Reviews Lessons Learned from previous similar projects.
  - Creates a draft of the project charter.
  - Identifies project point of contact (POC) and reaches out to them in an introductory phone call:
    - Introduce yourself.
    - Confirm they are the correct POC for the project.
    - Provides heads up about upcoming initial meeting to finalize the draft project charter [explain the purpose of a project charter].





## Requirements: Uses Cases - CID SSN Alias

- Inquire as to their availability/preference of when to meet; is their calendar current? Confirm the identity of the project sponsor. Ask who else should be invited.
- Thank them; express looking forward to working with them.
- Confirms IPS Manager created the Planview charge bucket with all project phases and that the IPS TRA is aware of their assignment to the project.
- Enters PM and TRA resource assignment for the current phase.
- Facilitates a meeting to create the draft project charter, following the process outlined in the IT PMT Meeting Management process document.
  - **Invitees:** PM, TRA, project POC, and others designated by the POC in the introductory phone call.
  - **Body of meeting invite:** PM creates a rough draft of the charter and includes a link to it in the meeting invite, following the meeting invite template.
  - **After the meeting:** PM sends draft project charter to IT PMT manager and other internal staff as appropriate, for review and edits.
- Sends updated version of project charter to the project POC for their review and feedback.
- Sends final version of project charter to the project sponsor for their review and signature/approval. Email approval is acceptable.
- Uploads the following documents to the project SP site>Initiation phase: approved charter (.pdf), approvals, project request, needs assessment, and business case.
- At end of phase:
  - Closes current Planview phase
  - Updates IT Initiatives SP list to next phase

### Outputs

- Approved project charter
- Resource requests for next phase

## Planning

### Inputs

- Approved project charter

### Processes

PM:

- Reaches out to the appropriate resource managers informally, to let them know about the project and to give them a heads up about email and meeting invite to come.
- Sends an introductory email covering the following points:
  - Introduce the project
  - Project briefing invite coming
  - Meeting prep: document links
- Sends out meeting invite to resource managers and their team leads at least a week in advance and includes document links for meeting prep.
- Holds project briefing for the resource managers and the project customer Point of Contact (POC), using the appropriate presentation template. Meeting follow-up deliverable: RM identifies roles and number of hours needed per role, per phase and sends to PM.



## Requirements: Uses Cases - CID SSN Alias

- If needed, PM follows up with resource manager(s) to confirm resource role assignments.
- Confirms project has been set up in Planview.
- In Planview:
  - Requests project resource roles for the current phase (only) and awaits reserves from resource managers (best practice is to go into PlanView to see hours used in similar projects).
  - Creates allocations based on reserves provided by resource manager. At this point, the PM has been provided resource names.
- Sends an introductory email to the resources welcoming them to the project, providing the Planview bucket for recording time, and advising that a kickoff meeting invite will be coming shortly.
- Facilitates a project team kickoff meeting to introduce everyone and provide an overview of the project.
- After TRA completes Planning Phase tasks (see below), PM facilitates a project team planning meeting to identify project tasks, durations and dependencies. The meeting invite will include a link to the approved project charter and any supporting documents to review as meeting prep. Meeting output is the project schedule.
- Facilitates a second project team planning meeting to populate the project SP site Communication Plan, Training, Plan, Risk Register, Stakeholder Register, and Issue Log.
- Gathers Lessons Learned throughout the project lifecycle (input results directly into Lessons Learned catalog).
- Stores documentation: As documents relating to the project roll in, PM verifies with project sponsor if document is a convenience copy and also the retention period for each document. This step is done for every document, when received, throughout the project.
- At end of phase:
  - Closes current Planview phase and requests resources for next phase
  - Reach out to the resources and give them the new charge code for the next phase.
  - Updates IT Initiatives SP list to next phase

### *Technical Requirements Analyst (TRA):*

- Creates CURRENT STATE and FUTURE STATE documents.
- Conducts work package identification meeting(s) to come up with high-level tasks, timelines and hours estimates.
- Creates the business requirements document (BRD). TRA and PM send BRD to project team for review and feedback. PM facilitates follow-up meeting to incorporate feedback.

### Outputs

- Resource assignments
- Budget
- Communications Plan
- Training Plan
- Quality Assurance (QA) Test Plan
- User Acceptance Test (UAT) plan
- Risk Register
- Stakeholder Register



## Requirements: Uses Cases - CID SSN Alias

- Issue log
- CURRENT STATE document
- FUTURE STATE document
- Business Requirements Document (BRD)
- Project schedule
- Other items as needed

## Execution

### Inputs

- Resource assignments
- Budget, communications plan, training plan, quality assurance (QA) test plan, user acceptance test (UAT) plan, risk register, and stakeholder register, and issue log
- CURRENT STATE and FUTURE STATE documents
- BRD
- Project schedule

### Processes

#### PM:

- Creates assignments in JIRA.
- Conducts project meetings as needed.
- Updates project schedule, registers, and logs continuously.
- Gather Lessons Learned throughout the project lifecycle (input results directly into Lessons Learned catalog).
- Escalates issues as they occur, to facilitate resolution.
- Manages change requests.
- Closes current Planview phase and requests resources for next phase.
- Sends weekly project status notifications.
- Obtains customer acceptance on deliverables.
- At end of phase:
  - Closes current Planview phase and requests resources for next phase
  - Updates IT Initiatives SP list to next phase

### Outputs

- QA system test results
- UAT test results
- Customer acceptance of deliverables
- Change requests
- Updated project documentation
- New/updated system documentation



## Requirements: Uses Cases - CID SSN Alias

### Closing

#### Inputs

- Customer acceptance of deliverables

#### Processes

- Developers and TRA create Production Support Plan (*transitions the project product from the project to operational state*).
- SE group creates/updates the Operations Support Manual (OSM) if needed.
- PM and TRA create Desk Reference/User Guide (*all systems should have this*).
- PM:
- Facilitates a Lessons Learned review, inputting the results directly into the IPS Lessons Learned catalog.
- Updates Project Information in project SP site.
  - In the project SP site>Project Information, enter the Project Closed date and set the retention timer.
- Asks manager to change project SP site to Read-Only mode.
- Closes JIRA tickets.
- Update IT Initiatives SP list **Status** and **Phase** columns.
- Determine ongoing support team and send to IPS Manager, along with request to create Planview enhancement and support charge codes. IPS Manager will send charge code information to support team.
- Completes the current phase and initiates closeout procedure in Planview.
- Facilitates project completion celebration.

#### Outputs

- Production Support Plan
- New/updated OSM
- Desk reference/User guide
- Approved Project Acceptance
- Updated Lessons Learned catalog
- Updated and Read-Only project SP site
- Celebration!



# Weekly Status Notifications

## Introduction

DPS IT PMT project managers are responsible for ensuring effective communications for the projects they manage. Here is guidance on populating and maintaining the project status dashboard for IT PMT projects.

## Project Updates

- The following items display on the project SP site template home page and comprise the project status dashboard:
  - Project Information
  - Project Summary w/Timeline
  - Tasks (*splits into Current and Upcoming, depending upon date*)
  - Progress Notes
  - Change Requests
  - Hot Risks
  - Hot Issues
  - Action Items
- Update these web parts in preparation for sending the weekly status notification email. When reporting Tasks, stay at a high level.



## Weekly Status Notification

- Each Thursday or Friday, navigate to the project SP site homepage and right-click the dashboard. Select **Print Preview** and save it as a .pdf or an .xps file to the project SP site **Documents** library>*Monitoring & Controlling* phase.
- Send the following weekly status notification email:

\*\*\*\*\*

To: customer POCs

Cc: project team and resource managers

Subject: <project name> project status mm/dd/yyyy

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Hello all -

The <**project name**> project status has been updated. To access the project status at any time, click here: <**hyperlinked project name**>

If you have any questions regarding project status, please feel free to contact me.

Thank you.

<PM signature>

\*\*\*\*\*