Veterans Health Administration

Regional Data Processing Collocation Project

Project Management Office Guidebook

Version 1.0

June 2, 2006

WORKING DRAFT

Document Change Control

Version Number	Date	Revised By	Revision Description
0.1	11/10/05	Cheryl F. Jones	Original Document
0.2	1/27/06	Cheryl F. Jones	• Renamed document as RDP PMO Guidebook • Identified areas that meet the objectives of the PMI® PMBOK® Guide • Incorporated SharePoint Guide • Added details to "placeholder" sections
0.3	2/17/06	Cheryl F. Jones	Includes results of working sessions with entire RDP PMO team
0.4	3/14/06	Lori Nicely	Various edits throughout document
0.5	3/14/06	William Balberchak	Added Contractor In-Processing flowchart.
1.0	6/2/06	Cheryl F. Jones	Finalized all input
1.0	6/2/06	William Balberchak	Updated text according to suggestions in Handbook review on 5/31/06
1.0	6/9/06	William Balberchak	Updated parts of SharePoint Handbook, pasted Org Chart into section 2.2

Project Management Office (PMO) Guidebook
Authorization Memorandum

We **have carefully assessed the Project Management Office (PMO) Guidebook for the Regional Data Processing Center Co-location initiative. This document has been completed in accordance with the requirements of the Department of Veteran Affairs Office of Information and Technology IT Project Management Handbook.**

MANAGEMENT CERTIFICATION - Please check the appropriate statement.

______ The document is accepted.

______ The document is accepted pending the changes noted.

______ The document is not accepted.

We have read and fully understand the content of the RDP PMO Handbook. Our signatures below indicate that we are in agreement with its content and we will implement the policies and procedures detailed here.

______________________________	____________________
Horace Blackman National Project Manager	**DATE**
______________________________	____________________
Cheryl F. Jones PMO Business Lead	**DATE**
______________________________	____________________
Stig Hammond PMO Technical Lead	**DATE**
______________________________	____________________
Charles Pastel Risk Quality Management Analyst	**DATE**
______________________________	____________________
Lori Nicely Strategic Communications Lead	**DATE**
______________________________	____________________
Rick Auman Organization Change SME	**DATE**
______________________________	____________________

Vladimir Pierre **DATE**
Project Planner

______________________________ ____________________
Andy Mattocks **DATE**
Western Regional Demonstration Project Manager

______________________________ ____________________
Helayne Sweet **DATE**
Northeast Regional Demonstration Project Manager

______________________________ ____________________
Sabrina Poole **DATE**
MLO Project Manager

______________________________ ____________________
William Balberchak **DATE**
Administrative Support

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1 Introduction

1.1 Purpose of the RDP PMO Guidebook

The purpose of the *RDP PMO Guidebook* is to provide guidance and direction on the business processes that the RDP PMO will employ for the duration of the RDP project. This guidebook harnesses team members' individual experiences to define and to develop the RDP PMO approach for standardizing work processes and overall project methodology. The guidebook provides team members with a quick reference to project tools and processes.

Where applicable, this document meets the goals and objectives of One VA and the Project Management Institute (PMI®) *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) Third Edition.* Applicable areas are noted.

It is assumed that each team member shares the common value of working efficiently and effectively to meet the goals of this project. For consistency, all are encouraged to abide by these guidelines outlined in this document. If the guidelines are incomplete or ambiguous, team members are encouraged to contribute for clarification. This is a "living" document, reflective of our business processes, best practices, and lessons learned. Failure to comply with these guidelines may result in unnecessary and/or excessive re-work for the project team.

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1.2 RDP Project Methodology

The RDP Co-location Project adheres to One VA and *A Guide to the Project Management Body of Knowledge (PMBOK® Guide) Third Edition.* Team members are encouraged to obtain a hard copy of the PMBOK® from the Project Business Lead. The PMO is conducting a Standards Analysis of DoD 5000, CMMI and other industry project management standards. When the assessment is complete, this guidebook will be updated to reflect those findings that may be beneficial to the project.

Comment [cfj1]: Check spelling

1.3 RDP Project Overview

The purpose of this project is detailed in the Executive Summary of the Project Charter and Project Management Plan as below:

> *In recent years, Congress has increased the pressure on the Veterans Affairs to consolidate its data processing centers. This is driven by the need to increase the efficiency and effectiveness of the Agency's IT infrastructure and improve the delivery of VHA's services. This push to consolidate data processing centers and improve overall*

Comment [cfj2]: Should this be Affairs?

investment efficiency is also driven by the tightening of the Agency's budget and an increased level of scrutiny from both VA and OMB.

To address these challenges, VHA is seeking to consolidate the current data processing centers across the enterprise– currently there are 128 data centers and the goal of the RDP effort is to consolidate these data centers by co-locating resources within a number of VISNs – and in some cases consolidating resources across multiple VISNs.

The RDP Co-location Project clarifies and documents, in a systematic and process-driven format, the business case for regionalization in data processing. This project will examine the results and impact of the current Co-location Pilots to assess the feasibility and anticipated benefits of implementing an enterprise-wide Co-location Program across all VISNs – including developing the detailed implementation plans through FY 2007. It additionally launches a Project Management Office responsible for coordinating and providing guidance for the implementation.

*The RDP Co-location Project Management Office (PMO) and the RDP Co-location initiative are strategically aligned with VA Architecture policy, strategy, and guidance. The aim of this initiative is to consolidate the current data processing center architecture – migrating from a distributed architecture at the medical center/facility level to a regionally distributed achitecture. This migration will establish a modified infrastructure which supports the needs of current and future VHA healthcare systems (e.g., VistA Legacy and Health**e**Vet-VistA) and other elements aligned with VA and VHA strategies and program goals.*

This strategic alignment supports Priority 5 of the Undersecretary of Health's 12 Priorities for 12 Months (Improving Information and Care Coordination) – by improving the current data processing architecture and establishing an infrastructure to more efficiently implement next generation health services delivery programs[1]*.*

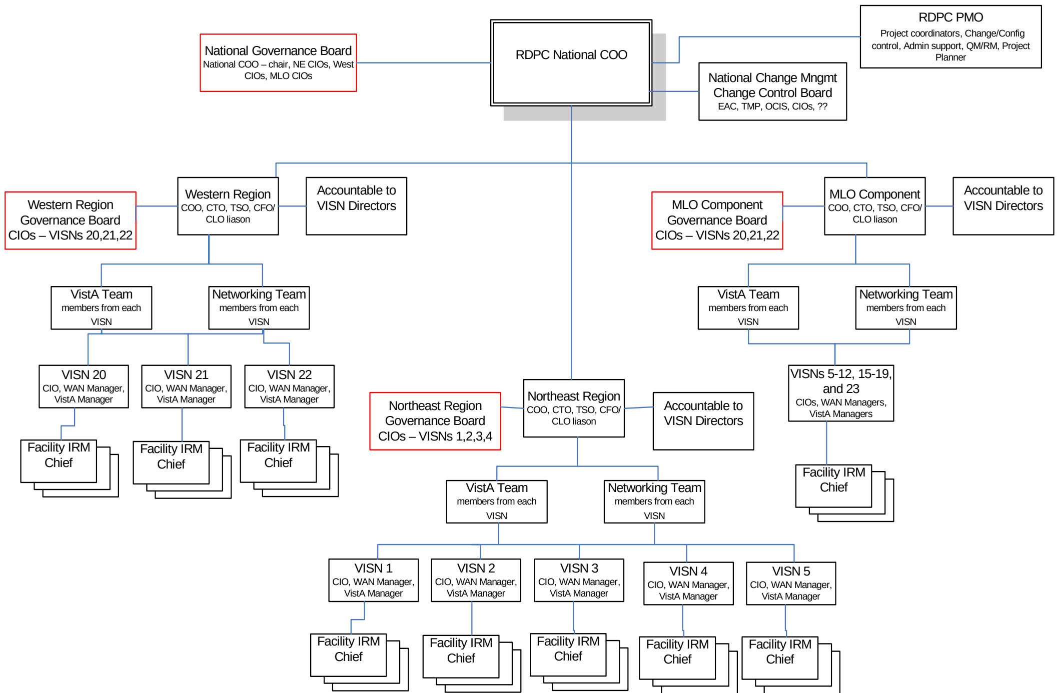
2 RDP Project Team

2.1 RDP Project Team Members

Team Member	Position	On-Site Location	On-Site Days
Horace Blackman	National Project Manager	726-N	M, T, W, Th, F
Cheryl Jones	PMO Technical Lead (Business Lead)	726-I	M, W, Th, F
Stig Hammond	PMO Technical Lead (Technical Lead)	726-J	M, T, W, Th, F
Charles Pastel	Risk Quality Management Analyst		
Lori Nicely	Strategic Communications Lead	726-C	M, W, Th, F
Vladimir Pierre	Project Planner		
Rickey Auman	Organization Change SME	726-I	T, Th, F
TBD	Organization Change SME	TBD	M, T, W, Th, F
Andy Mattocks	Western Regional Demonstration Project Manager	726-K, 726-C, 726-D	M, T, W, F
Helayne Sweet	Northeast Regional Demonstration Project Manager	726-N	F
Sabrina Poole	MLO Project Manager	726-K	T, Th
William Balberchak	Admin Support	726-J	M, W, F

Comment [cfj3]: Check spelling

2.2 RDP Project Organization Chart



-VISN CIOs will continue to be accountable to the VISN Directors and the Regional Chief Operating Officer (COO) will have a degree of accountability to VISN Directors.
- National COO will report to VHA/VA and will Chair the National RDPC Governance Council.
- Regional COOs will report to the National COO, will be members of the National RDPC Governance Council, and will have accountability to VISN Directors.
- VISN CIOs will report to the Regional COO and will be members of the Regional RDPC Governance Board. However, they will still be organizationally under and report to the VISN Director.
- Facility Information Resources Management (IRM) Chiefs will continue to report to the VISN CIO and will be members of the VISN Governance Committee.
- Membership and structure for the National Change Management/Change Control Board needs to be decided; however, it is critical that appropriate players be involved, such as Enterprise Architecture Council (EAC), Telecom Modernization Program (TMP), Office of Cyber and Information Security (OCIS), etc.

Figure 1: RDP Organization Chart

2.3 Position Descriptions

The RDP Position Description, maintained on the PMO Restricted Share Point Site, details the Position Descriptions for this project. To access the RDP Staffing Plan, click here and following instructions below: Link to Position Descriptions

Instructions:

1. Click on the RDP Staffing folder.
2. Click on the RDP Staffing 050726 document.

NOTE: This is a Restricted Share Point Site, requiring authorization. Refer to Chapter 9 for details.

2.4 Project Team Bios

The RDP Team Biographical Summary, maintained on the PMO Restricted Share Point Site, gives a brief summary of the team members' background. To access the RDP Team Bios, click here and follow the instructions below: Link to Project Bios

Instructions:

1. Click on the RDP Staffing folder.
2. Click on the RDP Team BIOs as of 110705 document.

NOTE: This is a Restricted Share Point Site, requiring authorization. Refer to Chapter 9 for details on this site.

3 Meetings

3.1 Scheduling Meetings

Where possible, meetings should be scheduled in advanced, using MS Outlook, to allow ample time for planning and preparations. The following is a guideline:

Meeting Type	Audience	Scheduling Timeframe
Executive Meetings	VHA Executives, Vendor Executives	At least 5 business days in advanced
Client Meetings	VHA, CACI, HPTi, M^2	At least 5 business days in advanced
Working Sessions	Internal PMO Team	At least 2 business day in advanced
Adhoc, Emergency Meetings	TBD	At least 1 business day in advanced

- RDP Meeting Organizer will acquire conference room and VANT line for all meetings facilitated by the RDP PMO. For details on how to acquire a conference room or VANTs line, view the Conference Room Scheduling and How-To-VANT documents by clicking here: Link to VANT instructions.

- RDP Meeting Organizer will update Event section of appropriate Share Point Site(s) with meeting logistics.

- RDP Meeting Organizer shall schedule all meetings, using MS Outlook.

- RDP Meeting Organizer will invite the appropriate audience to the meeting and clearly explain the purpose of the meeting. Refer to **Section 17.1 Sample Meeting Request.**

- RDP Meeting Organizer must coordinate with Regional PMs or the team member responsible for that area.

- Regularly scheduled RDP meetings are posted to the Restricted RDP Share Point Site. Click here: Link to RDP meetings schedule

3.2 Meeting Agendas

The purpose of meeting agendas is to make the most efficient use of team member's time by setting the boundaries for the meeting discussion topics. Meeting agendas should adhere the following guidelines:

- Use the ***RDP Meeting Agenda*** as a template for all meetings. Click here: **Link to RDP Meeting Agenda template**
- RDP Meeting Organizer shall forward the meeting agenda and any additional meeting materials, with the meeting notification.

- For a sample agenda, click here: **Link to sample agenda**

3.3 Meetings Minutes

The purpose of meeting minutes is to capture discussions, decisions, action items, issues, and risks during meetings. Meeting agendas should adhere to the following guidelines:

- Project Administrator, or responsible person, will take meeting minutes, using the ***Meeting Minutes Template.*** Click here: Link to Meeting Minutes Template

- Within 24 hours of meeting, Project Administrator, or responsible person, forwards meeting minutes to the Project Manager for review and approval.

- Within 24 hours of receipt, Project Manager reviews the minutes for accuracy, completeness. Project Manager will review to ensure quality.

- Project Administrator will publish meeting minutes to the appropriate SharePoint site(s). He will also notify the appropriate distribution grouping that the minutes are available. Alternative, RDP PMO may instruct meeting attendees to set up SharePoint Alerts for instant notifications of posted meeting minutes.

  All emails distributing meeting minutes will have the subject line:
  [Meeting Title] Minutes[date(mm/dd/yy)]
  Example: Western Region Vista Minutes 10/17/05

  All meeting minutes files will have the filename:
  [Meeting Title] Minutes [date (mm-dd-yy)]
  Example: Western Region Vista Minutes 10-17-05

- Project Managers will ensure that Action Items and Risks are collected in the minutes.

- Project Managers shall update the Action Items into the Action Item SharePoint database and update the Risks into ClearQuest risk management tool.

Actions:

Project Administrator distributes minutes via email	Within 48 hours of meeting
Project Administrator posts minutes to SharePoint site	Within 48 hours of meeting
Project Planner incorporates Action Items/Issues affecting schedule into the Project Schedule	Within 48 hours after Meeting Minutes are distributed

Meeting Minutes are published as follows:

Meeting	Audience
Western Status Meeting	VHA Western Region Systems Team
Western Networking meeting	VHA Western Region Network Team
Western Vista Meeting	VHA Western Region Vista Team
MLO Status Meeting	VHA RDP MLO
Northeast Status Meeting	Fill in email group name
Northeast Networking meeting	VHA Northeast RDP Internetworking Workgroup (internal & extern)
Northeast Vista Meeting	VHA Northeast RDP VistA Workgroup (internal & external)
APW RDP Strategy Meeting	APW RDP Planning Team
RDP Management Meeting	Fill in email group name
RDP PMO Meeting	VHA RDP PMO

4 File Naming Conventions and Formats

4.1 File Naming Conventions:

RDP Project deliverables will be named as follows:

VHA-RDP [Deliverable / Document] [Version]

Where:

VHA-RDP identifies this project. This is required for all documents that we provide to our client.

Deliverable identifies the client deliverable, such as *Risk Management Plan, Quality Management Plan, Communications Management Plan,* etc.

Document identifies the document, such as *Fact Sheet, VISN CIO Council Briefing, Medical Facilities Briefing, et*c.

Version identifies the document's version, such as *Fact Sheet v1.0, VISN CIO Council Briefing v0.2, Medical Facilities Briefing v1.1, et*c.

Examples of client deliverables include:
- VHA-RDP Communications Plan.NORTHEAST v3.0
- VHA-RDP Risk Management Plan v1.0
- VHA-RDP Quality Management Plan v0.2

Examples of other documentation include:
- VHA-RDP VISN CIO Council Briefing (provided to our client)
- VHA-RDP Fact Sheet (provided to our client)
- RDP Meetings Schedule (internal document for the RDP PMO only)
- Conference Room Scheduling (internal document for the RDP PMO only)

4.2 File Versioning:

All project files will be maintained on our internal RDP PMO SharePoint site. The team shall utilize SharePoint's versioning feature. Refer to Chapter 9 of this guidebook for procedures.

Versioning of documents, shall be noted within the document as ***version.revision***

Where

Version represents the version. Versions begin with 0 for documents being modified by the internal RDP PMO. The **revision** number is increased for all incremental changes to the version. When the document moves from internal draft to client draft, the version becomes 1.0.

4.3 Document Formats:

To ensure that all client deliverables have the appropriate cover pages, headers, footers, version control sheets, sign off sheets, etc. team members shall use templates for creating documents. A folder of templates is maintained our internal RDP sharepoint site. Click here:
Link to templates folder

4.4 File Properties:

The following file properties fields should be complete for all client deliverables:

- Title
- Subject
- Author
- Manager
- Company

Complete these fields as noted below:

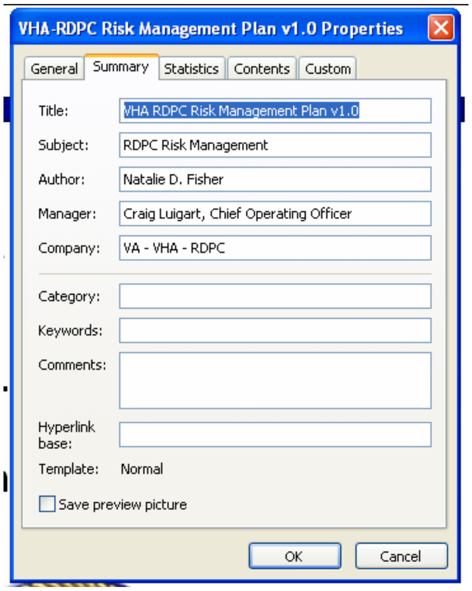


Figure 2: RDP File Properties

5 Status Reporting:

5.1 Architecture Planning Working Group Weekly Status Reporting

The RDP C Strategic Communications Lead will distribute the ***RDP Weekly Status Report*** to the Architecture Planning Working Group (APW) Coordinator on Fridays each week in preparation for the 3PM Monday meeting.

The process for preparing the weekly report is as follows:

- Each RDP C PM (National, Northeast, West, MLO) will email to the Strategic Communications Lead their component's progress in the following areas:
  - Site Planning
  - Migration
  - Analysis of Critical Events
  - Upcoming Events.
- The updates will be in succinct bullet form and will be sent (via email or in person) by COB Thursday .
- The Strategic Communications Lead will utilize the information to develop the ***RDP Weekly Status Report*** and will distribute the FINAL by COB on Friday to the APW Coordinator in preparation for the 3pm Monday meeting.
- *The Strategic Communications Lead, will post the report to the SharePoint site.
- The Project Planner will take all items from the Weekly Status Report that affect schedule and incorporate them into the Project Schedule.

Actions Summary:

RDP PMs (National, NE, W, MLO) send their component's progress, in succinct bullet form, to the Strategic Communications Lead.	Thursday by COB of each week
Strategic Communications Lead develops RDP Weekly Status Report	Friday by 3pm of each week
Strategic Communications Lead gets National PM approval on DRAFT report	Friday by 3pm of each week
*Strategic Communications Lead emails the FINAL report to the APW Coordinator	Friday by COB of each week in preparation for 3pm Monday meeting
Strategic Communications Lead posts Status Report to SharePoint site	COB Friday
Project Planner updates schedule with any new information	COB Tuesday

*The long term goal is to utilize SharePoint to streamline the dissemination process and avoid multiple email distributions.

5.2 RDP Individual Weekly Status Reporting

All PMO team members are responsible for posting their ***Individual Weekly Status Reports*** on the internal SharePoint site by COB on Thursdays. Each PMO team member will utilize the template provided by the PMO for developing his/her status report. The template for the individual weekly status report may be accessed via: Link to status report template
Updates should be in succinct bullet form and address the project's main activities and progress.

5.3 RDP Monthly COTR Report

The PMO Business Lead and the RDP Project Administrator will prepare the monthly COTR Report. This report is due by close of business on the 6^{th} of the month. RDP Individual Weekly Status Reports are used as the input for this report. The template for the Monthly COTR Report may be accessed via: Link to COTR Report template
Updates should be in succinct bullet form and shall address the project's main monthly activities and progress.

The Monthly COTR Report is forwarded to the National PM for final review. Upon final review, the final report is posted to our internal share point site: Link to Monthly COTR Reports

5.4 RDP Monthly Earned Value Reporting

TBD

6 Peer Reviews

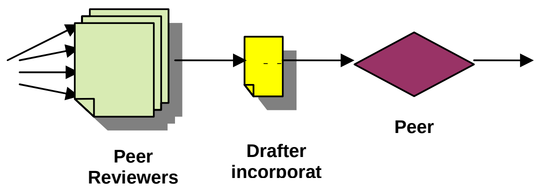
All documentation to our clients represents the entire RDP PMO. We are also maintaining a project library, should this project face auditing. For this reason, all documentation requires peer reviews prior to publishing to our clients.
The peer review process is critical for ensuring quality products are delivered in support of the RDP C, and should be used for all documents requiring signature by an RDP manager before being considered complete, or by a VHA COTR as in the case of a contractual deliverable or work product. Additionally, any administrative documents, such as this handbook, that will become part of the RDP archives that are maintained on the RDP SharePoint will be reviewed via this process.

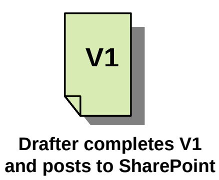
The peer review process is as follows:

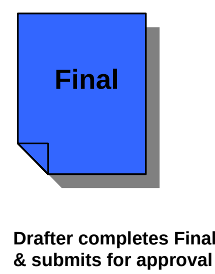
1. The Drafter of the original version of the document or work product will complete an initial draft, drawing from any needed insights/expertise resident within the PMO. Guidance/direction needed for the completion of the document/work product will be provided by the RDP PM's and/or direct supervisors of the Drafter.
2. Once the initial draft is complete, Version 1 will be posted on the RDP SharePoint and an email will be sent to all members of the PMO (Peer Reviewers) notifying them that the document has been posted, and requesting that they review/provide feedback and comments within 5 days. Peer Reviewers will use the "check out" function of SharePoint to check the document out and will make any comments, corrections, additions/deletions, etc. using the "track changes" function, and then will check the document back in to SharePoint. This will ease the process of updating the document, incorporating feedback and managing version control of the document.
3. After the five day period has ended, the Drafter will begin work on Version 2, incorporating any comments, answering questions, making any edits/changes/etc. noted in the marked-up version. During this step of the process, the Drafter should not just "accept all" changes made to the document, but rather should take deliberate effort to consider each comment, question or concern before updating the document for Version 2. This may require additional research, input from other experts on the topic and/or meetings to discuss the implications of a particular change/addition.
4. Once Version 2 has been completed, the Drafter will again post it on the RDP SharePoint and send out an email to all Peer Reviewers that Version 2 is available for review; 5 days will be allowed for Peer Reviewers to review the document. It should also include a meeting request, where the Drafter will facilitate a complete review of Version 2 with all Peer Reviewers. This will typically be a "sit down" session, with Peer Reviewers present to talk through any final changes/adjustments considered necessary to finalize the document. Depending on the size of the document, this could take any where from one to four hours. Written meeting notes and action items will be taken by the Drafter as part of the meeting.
5. Upon completion of the Peer Review meeting, the Drafter will have 7 days to complete the final version of the document. Once complete, the final version will be posted to the RDP SharePoint, and will be forwarded to the RDP PM for final signature (in the case of internal PMO only documents) or for final review and forwarding to the RDP COTR for

review/acceptance. All Peer Reviewers will also be notified via email that the final version has been completed, submitted, and posted on the RDP SharePoint.

The Peer Review process for contractual deliverables will follow any additional steps required by VHA Contracting procedures, but will also follow the above internal process before commencing the VHA process (See VHA Contracting Manual for details).







7 RDP Share Point Sites

Share Point sites provide the PMO team a centralized location to share RDP project information. The sites are managed by the RDP PMO and RDP clients. These sites also provide archives/repository of documents for the RDP efforts, including a place for tracking risks/action items for the project.

7.1 National SharePoint Site

Currently, this is our primary channel for providing information about RDP to broad audiences across all of VA/VHA and external stakeholders. The content of this site includes: news/status of project, FAQ's, schedules, meeting agendas, meeting minutes, etc.

This website is managed by the RDP PMO. The RDP PMO posts latest versions available of all project deliverables. For questions or concerns regarding the site, contact the RDP Project Coordinator William Balberchak at William.Balberchak@va.gov.

This site has surveying capabilities for participants to provide feedback to the project about their concerns.

To access this site, click:. Link to National SharePoint Almost everyone in the VA Global Address Listing (GAL) has access to this site. Refer to Section 17.1 for a list of all users with access to this site.

7.2 RDP PMO Restricted Site

The RDP PMO Restricted SharePoint Site provides the PMO team a centralized location to share RDP project information. This site is being managed by the RDP PMO. The team posts various versions of all project deliverables, status reports, presentations, etc. The goal of this site is to facilitate collaboration.

Everyone on the team has at least "contributor" authority, which grants privileges for uploading documents into existing folders. The team manages Action Items and accesses the Risk Management Tool, ClearQuest, from this SharePoint site.

For questions or concerns regarding the site, contact the RDP Project Coordinator William Balberchak at William.Balberchak@va.gov.

This site has surveying capabilities for participants to provide feedback to the project about their concerns.

To access this site, click here: Link to Internal SharePoint. Team members and access types are as follows:

Users	Access Type
Andrew Mattocks	Contributor
Auman, Rickey	Contributor
Balberchak, William	Contributor
Blackman, Horace	Contributor
Hammond, Stig	Contributor
Johnson, Vanessa A. (HPTI)	Administrator
Jones, Cheryl	Administrator
Nicely, Lori	Contributor
Poole, Sabrina (HPTi)	Contributor
Sweet, Helayne	Contributor

Figure 3: Access to Restricted RDP Share Point Site

7.3 Northeast RDP (NERDP C) Restricted Site

The Northeast SharePoint site is used by members of the Northeast region to store various documents. The site is restricted to Northeast members and others as appropriate. To request access to the site, email Willy Cruz at Willy.Cruz@va.gov. To access the site, click here: Link to Northeast SharePoint

7.4 Share Point Handbook

7.4.1 Accessing SharePoint

To access the PMO Internal SharePoint site:
Go to Link to Internal SharePoint.
When first logging into the site, User Name and Password may be required. These are the same as VHA username and password for email. However, you may set internet options so that entering your information is not required when accessing the SharePoint site, even after your computer has been shut down. To set these options:
From Internet Explorer, go to Tools, Internet Options. Click on the Advanced tab. In the Settings area, scroll down until you see the Security grouping. There's an option there called Enable Integrated Windows Authentication. Make sure it's checked, and then click Apply.
Now click the Security tab. Highlight the Trusted Sites green check mark, and then click the Sites button. Uncheck the box that says Require Server Verification In the Field called Add this Web Site to the Zone type in http://vaww.infoshare.va.gov and then click the Add button. Now Click Ok.

7.4.2 SharePoint Description

SharePoint is a collaboration tool for team communications. Project documents can be stored and exchanged on the SharePoint site. Version control is currently active so that backups are made of each document when the document is edited or a new version is uploaded. Note that SharePoint's version control does not maintain old versions of a document if that document is deleted from SharePoint; version control only maintains versions of changed documents.

7.4.3 SharePoint Sections

On the left side of our internal page is the Quick Launch section, which is a list of links to the most common folders. Note that there cannot be subfolders within folders that are on the Quick Launch. We currently use the sections of Documents, Pictures, and Lists.

Quick Launch section

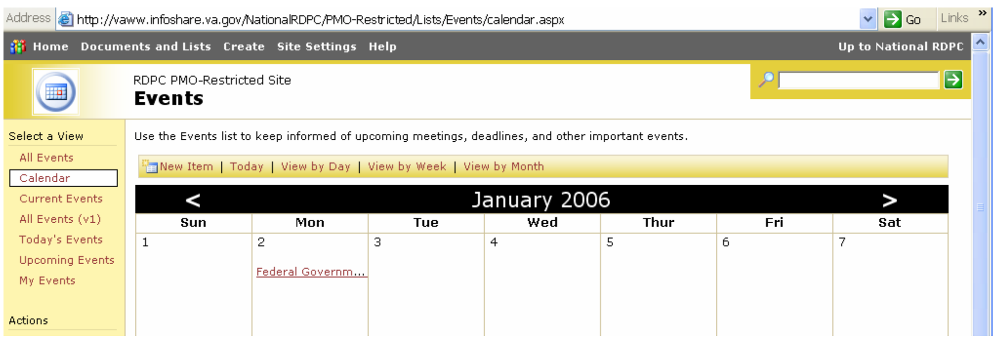
Some of the sections within Documents:

Project Documentation, which contains Charters, Project Management Plan.
Status Reports, which contains our personal status reports.
Risk Management, which contains risk management documents.
Strategic Communications, which contains communications documents.
Project Administrative Documents, which contains a meeting schedule, a Travel folder, a folder of RDP PMO Meeting agendas, an RDP Email Distribution Groups list, and other administrative documents.
Quality Management, which contains a Quality Management Plan
Organizational Change Management, which contains OCM Strategy documents

Pictures is used to store project related images. It currently has an OCM Infrastructure, an RDP Work Breakdown Structure, and other images.

Sections within Lists:

RDP Action Items, which contains our list of Action Items.
Links, which contains links to business related websites.
Events. Events is set up as our Calendar, containing certain meetings, workshops, and other events.



Events Calendar

Contacts, which has a list of contact information

There are several Quick Launch folders and files listed in the middle of the Home page. Note that clicking on a folder name here will refresh the entire page and display the folder contents in place of the folder name. On the right side of the page is the Links section (also on Quick Launch).

7.4.4 Search Feature

SharePoint has a Search feature to find documents. From the Home page, enter the document or keywords ("cube assignment" for example) you want to find into the textbox in the upper-right corner and press Enter. The search returns documents that contain the keywords. If you execute a search while within a specific folder (not on the Home page), the search will only return items that are within that specific folder.

7.4.5 Version Control: Checkout Feature

In order to maintain proper version control of our documents, we must use the "Check Out" feature. The procedure for this is as follows:

Moving the cursor over a document in SharePoint will highlight the row that the document is on, and clicking just to the right of the document will bring up a menu for that document. Note that this menu is not available when viewing documents that are displayed in the middle section of the Home page – attempting to click on a document here will not allow you to check out the document. In order for this menu to be available, you must go to the folder or section that the document is in – click on the name of the section from the Home page or from the Quick Launch.


Action Items

Type	Name	Modified By
	Current Action Items - Jan 6th	Balberchak, William
	Current Action Items - Jan 5th	Ogle, Mark (CACI)
	Current Action Items - Dec 29th	Ogle, Mark (CACI)
	Archived Action Item Reports	Ogle, Mark (CACI)

Add new document

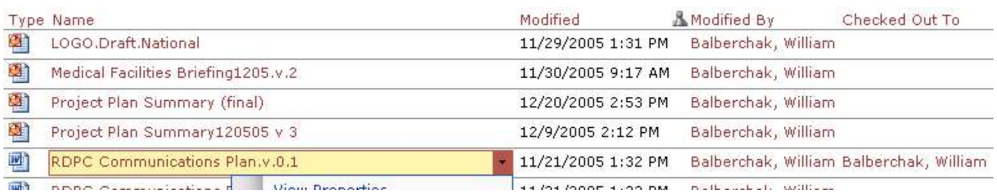
Strategic Communications

Type	Name	Modified By
	RDPC issue paper for Secretary for 07 budget v0.3 011306	Nicely, Lori
	Sullivan Speech to IRM v0.6 011306	Nicely, Lori
	RDPC Communications Plan.v.0.5	Nicely, Lori
	RDPC EOC Briefing.v.1	Nicely, Lori
	RDPC EOC Briefing.v.2	Nicely, Lori
	RDPC Executive Synopsis_for distribution	Balberchak, William
	RDPC Executive Synopsis _for distribution_	Balberchak, William
	Project Plan Summary (final)	Balberchak, William
	Project Plan Summary120505 v 3	Balberchak, William
	RDPC EOC Briefing1205 v 3	Balberchak, William
	Medical Facilities Briefing1205.v.2	Balberchak, William

When on Home page, document menu not available.

Document menu available when user is actually in a folder.

On this menu is a "Check Out" option. Clicking on this option will check out the document to you, and your name will be listed under the "Checked Out To" column.



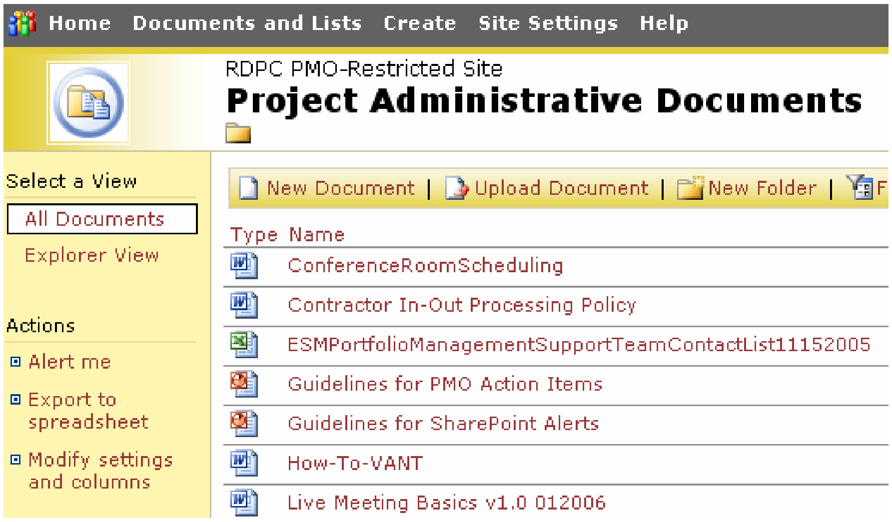
Name in "Checked Out To" column.

Only one person may possibly check out a document at a time.
After you have the document checked out, you may click on its menu again and choose the option to Edit ("Edit in Microsoft Office Word" for example). This will open the document. After changes are made, Save the document (doing so will save changes to the document on SharePoint) and close the document. Closing the document should prompt you to "Check In" the document – do this to check it in (and allow others to check it out).

This procedure should be followed anytime that our group wants to change a document that is posted online. Note that this procedure is not necessary if a newer version of a document is being uploaded onto SharePoint to replace an old version that is currently posted (and the old version is being deleted). Note also that it is possible to edit a document without checking it out: technically, you may choose the option to "Edit in Microsoft Office Word" without first choosing to check out the document. Please check out documents when you need to edit them, and do not attempt to edit documents that are currently checked out.

7.4.6 Explorer View

By default, documents and folders in SharePoint are displayed in the "All Documents" view. This is shown on the left side of the page when in a folder, under "Select a View."



View is "All Documents"

By clicking on "Explorer View," documents and folders can be displayed as they would be in Windows Explorer on your desktop.

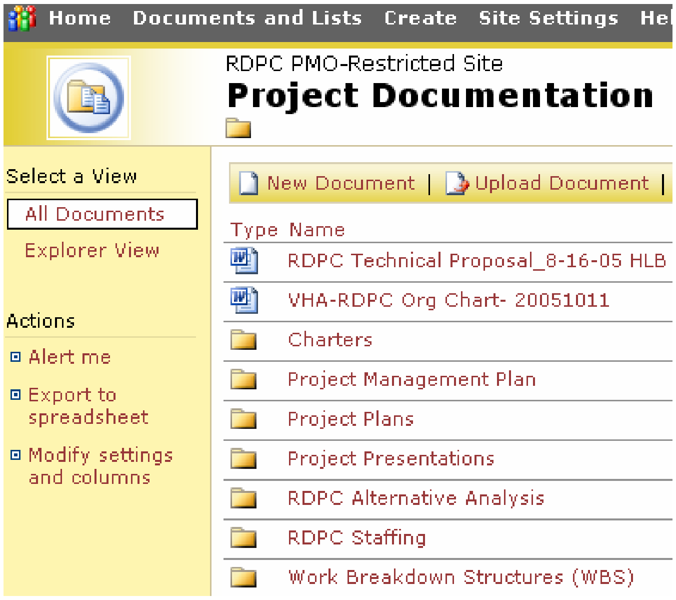
View is “Explorer View”

When you click on “Explorer View,” you may be prompted to enter your VA password (and you may also see a “page cannot be displayed message” on the page behind it). Entering your password should make the Explorer View display correctly. Occasionally this will not work and you will not get the prompt to enter your password; no fix is currently known for this. It is currently unknown why Explorer View does not always work properly, or if it can be made to always work.

While in Explorer View you can cut and paste documents into different folders as you would in a normal Windows Explorer environment. Folders are opened by double-clicking on them. To go “up” in folder hierarchy, you must click on the first link listed under “Other Places” on the left (this should be the name of the next highest folder in the hierarchy). Note that documents and folders cannot literally be dragged and dropped in SharePoint as you can in Windows.

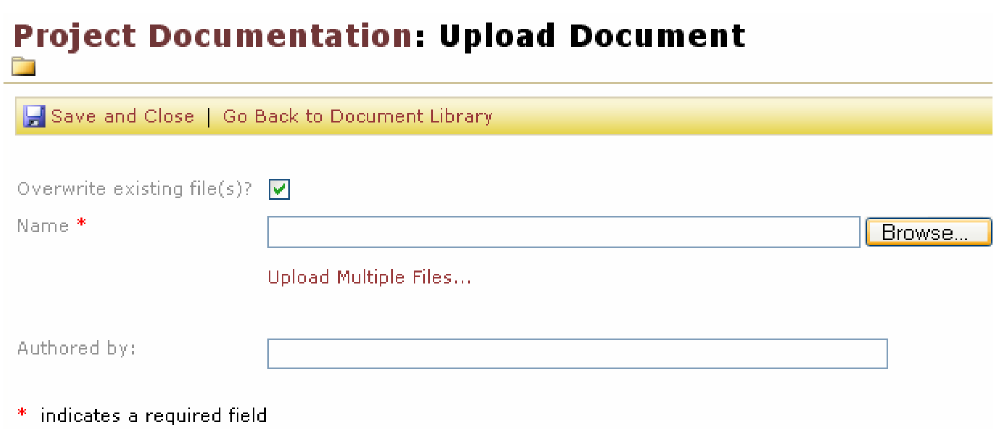
7.4.7 Uploading Documents

Each of our team members can also upload documents. Click on the name of a section or folder. Several links will be available above the folder’s contents, one of which is “Upload Document.”



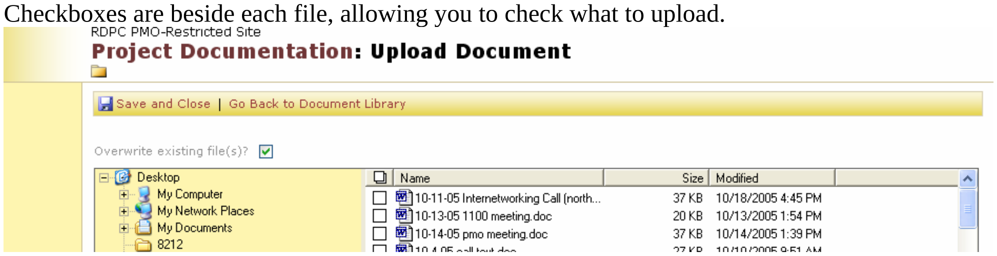
Upload Document available at top of document list.

Clicking “Upload Document” allows the user to browse to a document and upload it to that folder. Note that there is a checkbox to “Overwrite existing files?” and that it is automatically checked. If you upload a file to a SharePoint folder that has the same name as an existing file in that SharePoint folder and you leave this option checked, the existing file will be overwritten by the uploaded file. If this happens accidentally, old versions of files can be recovered through SharePoint’s versioning system; please see William Balberchak to obtain overwritten files. Remember that SharePoint’s version control does not maintain old versions of a document if that document is deleted from SharePoint.



Page to upload a document.

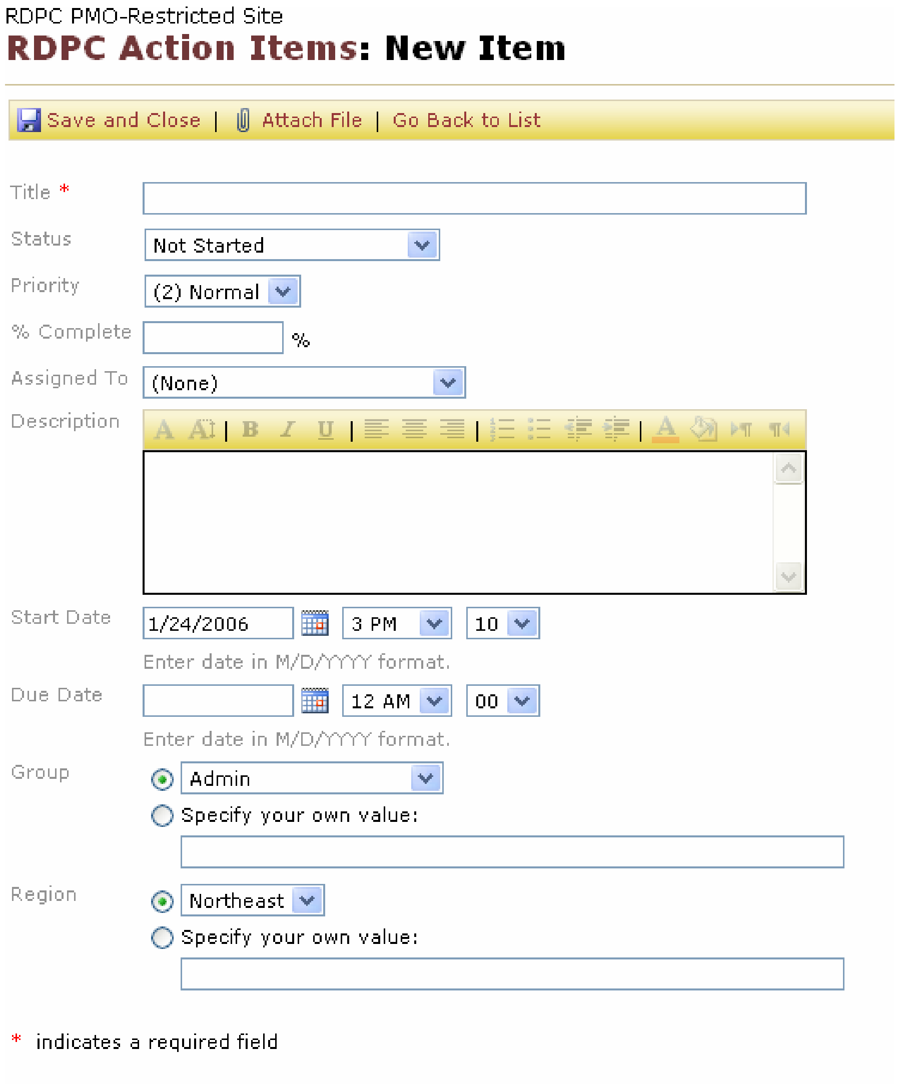
Clicking the “Upload Multiple Files” link will bring up a list of your computer’s folders and files. Checkboxes are beside each file, allowing you to check what to upload.



Upload Multiple Files page.

7.4.8 Process for entering and maintaining Action Items

You can enter a single action item by clicking on the “RDP Action Items” link on the left. This brings up a list of all items. Click on “New Item” at the top to enter an item. Some of the information stored includes Status, Priority, and % Complete. Items can be assigned to anyone in our group and be associated with a group and/or region.



Enter new Action Item

Excel lists of Action Items (such as the Northeast lists) can be pasted into the SharePoint list. From the SharePoint action items list, click on “Edit in Datasheet” at the top of the page. The list of items should open in a spreadsheet within the web page similar to an Excel file. Information can be pasted into this spreadsheet and saved if it is in the same format as the existing items in the SharePoint spreadsheet.

Going forward, our team is to use this SharePoint Action Items list to display all our action items. As mentioned below, action items can be kept in an Excel spreadsheet and pasted into the SharePoint items if desired.

7.4.9 Excel Capabilities

The Action Items can be exported to an Excel spreadsheet. Click on "Export to spreadsheet" on the left of the page while viewing the Action Items. Click Save to save the spreadsheet to your computer. The filename will be just a series of letters and numbers; when you open the Excel file you can save it under a different name.

7.4.9.1 Link to spreadsheets

Stig Hammond has created a flash demo of how to link an external Excel file to the SharePoint list of action items, so that a user can make changes to an Excel file of action items and have those changes be synchronized with the SharePoint list. The flash demo consists of 6 files which are on the SharePoint site under Project Administrative Documents -> PMO Training Demos. A link to this folder is:

http://vaww.infoshare.va.gov/NationalRDP C/PMO-Restricted/Project%20Administrative%20Documents/Forms/AllItems.aspx?RootFolder=%2fNationalRDP C%2fPMO%2dRestricted%2fProject%20Administrative%20Documents%2fPMO%20Training%20Demos&View=%7bF7808D21%2d57D4%2d4DCF%2dB9F7%2d78FA94F4249F%7d

To view the flash demo, download the 6 files to a folder on your computer. Open the html file called "Linking SharePoint Action Items to Excel" to view the demo. The demo is an animation. Use speakers or headphones as the demo includes sound.

7.4.9.2 Uploading

A list of action items cannot be uploaded into the SharePoint list; items may only be pasted in as described in "Process for entering and maintaining Action Items."

7.4.10 Process for changing Action Items fields

Properties for the list of action items can be changed if the user has proper SharePoint administrative rights. When viewing the action items, on the left side of the screen is an action to "Modify settings and columns." Clicking on this allows columns to be edited or deleted.

7.4.11 Views

When the list of action items is displayed, several "views" are listed on the left side of the page. SharePoint views can be set up to display only certain fields for items or to restrict which items are displayed. Custom views can be created (proper permissions are required to make a view). To create or edit a view, click on "Modify settings and columns" on the left while viewing the action items, and scroll down to “Views.” Click on a view to edit that view. Click “Create a new view” and then click “Standard View” to make a new view.

8 File Storage:

The RDP PMO currently does not have a file server. It is unknown when, or if, the team will acquire one. For this reason, all files are stored to the Restricted RDP PMO Share Point Site.

Files are stored in folders, based on the subjects. Team members are to contact RDP Project Administrator, for adding folders that may not currently exist. Backup storage is managed by the VA's maintenance procedures.

The following is required, should the RDP acquire file storage:

- Directory Structure
- Deliverables Index Log
- Archiving older versions
- Backup storage

9 Issue Tracking / Risk Tracking Tool:

As an integral part of the RDP's efforts to plan for and manage risks, the RDP has adopted the use of a risk tracking tool that has been customized for use by the RDP. This tool is used by the RDP to enter, track and manage risks and has been developed using IBM Rational's ClearQuest software. This tool has a database schema created specifically from requirements set forth by the RDP.

The primary purpose of the tool is to help project managers facilitate their tracking and mitigation of risks to their projects. This is accomplished by the project managers following a rigorous process of project planning to include the identification of, entering and evaluation of risks throughout their RDP projects. By using this tool project managers will be enabled to assess their progress of planning for and addressing their associated risks. The tool has imbedded features that can customize reports based on values dependant to a user's needs. Standard high priority reports are produced by the Risk Manager on a weekly basis for review during the weekly RDP Leadership Call. These reports are kept on the RDP Internal SharePoint site at: http://vaww.pmo.rdpc.va.gov/Risk%20Management/Forms/AllItems.aspx

To be able to access the tool, a person must be on the RDP Risk Tracking User List as maintained by the RDP PMO's Risk Manager. People wanting access to the site should contact the Risk Manager to determine the information needed. Upon being informed of having access a user will be directed to the risk database site (http://vhaishwebr1:81/cqweb/login) along with instructions on how to login in. Users will also be placed into a queue for training on the use of the tool and will be notified when that training is available.

The details on the risk management process and the procedures for utilizing the risk tracking tool are kept current in the RDP Risk Management Plan (http://vaww.pmo.rdpc.va.gov/Risk%20Management/Forms/AllItems.aspx)

10 Primavera Resources:

Primavera Project Management training materials are stored in the project library. Additionally, the following links are available for assistance:

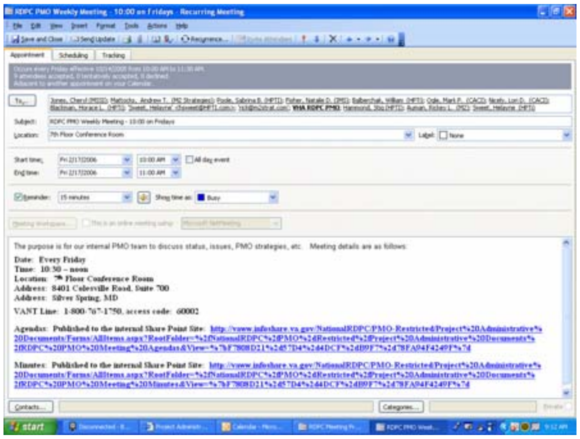
Topic	Link
myPrimavera Web-Based Training	http://vaww.vistau.med.va.gov/vistau/primavera/index.htm
Earned Value Web Based Training	http://vaww.vistau.med.va.gov/vistau/earnedvalue/index.htm
TeamPlay training website	http://vaww.vistau.med.va.gov/vistau/teamplay/
TeamPlay Office website	http://vaww1.va.gov/teamplay/

Figure 4: Primavera Links

Copies of these documents are available in the RDP Library, located between cube 726-B and 726-C.

11 Appendix A - Samples

11.1 Sample Meeting Request



12 Appendix B - Access to Share Point Site

12.1 Access to National Share Point Site

***NOTE:** As the National RDP SharePoint site was created under the “Root Administration site” within SharePoint all users default to each site listed under the Root Administration site, but cannot access a particular site without access granted from the Site Administrator. The National RDP site was created so that it is a “standalone” site. All documentss/information listed on the site are secure from anyone attempting to access the site without Vanessa Johnson, SharePoint Site Administrator granting them access.

To date, the National RDP site is set up as a unique user id required, so that any user requesting access will have to be granted access by the Site Administrator. For example, if an existing user forwards the National RDP URL to a user who does not have access to the site, once the users clicks on the URL, a pop-up window would appear prompting the user to send the “grant for access” email to the Site Administrator for approval to enter the site.

The below list cannot be deleted, as it would prevent those users (that are not a part of the RDP site) from accessing other sites to which they have right.

Click this link for a list of users who have access to the National Share Point Site:
http://vaww.infoshare.va.gov/NationalRDPC/_layouts/1033/user.aspx