Summary

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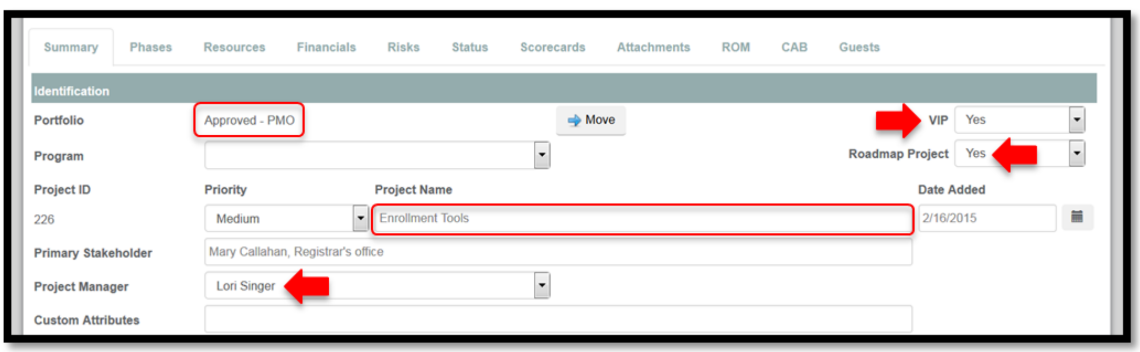
This user guide demonstrates how to interact with the approved project landing page, the Summary Tab. Users can identity relevant summary data for record keeping and reporting.

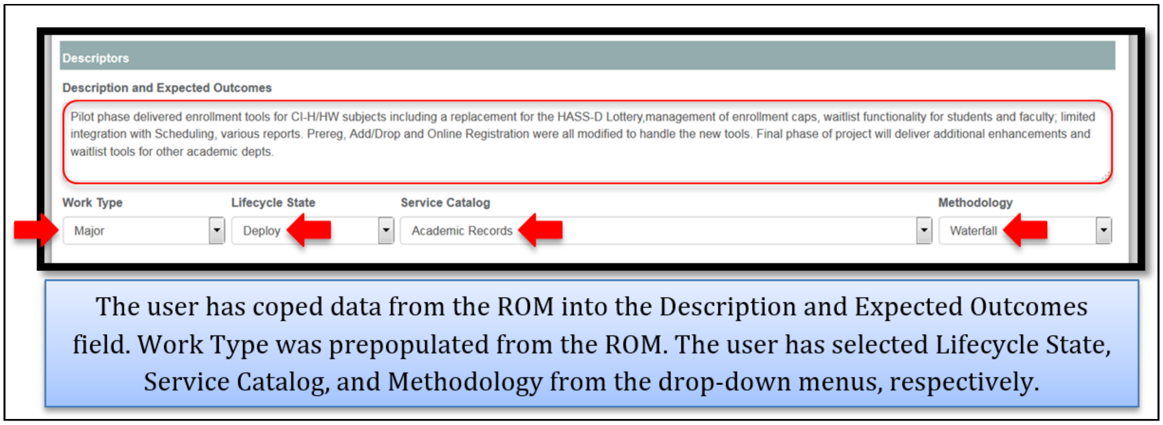
Steps to Complete the Summary Tab

1. Open the PPMO Tool.
2. On the Home Page, select “Projects” from the left-side Menu. A pull down menu appears with PMO, My Projects, ROM, CAB, and Escalations.
3. Select “My Projects”. The My Project list displays.
4. Double click on the project which needs Summary data. The Summary tab is selected by default.
5. Complete the necessary fields.
    a. **Portfolio:** The PMO has multiple portfolios for a wide range of IS&T projects. If you believe your project is in the wrong portfolio, please contact the system administrator, Derek Nahabedian, for correction.
    b. **Program:** If your project is related to a program, select a program option from the drop down list.
    c. **VIP:** Select Yes or No from the drop-down menu to indicate if the project was identified by Faculty, Assistant Dean, etc. *(this will be prepopulated from the ROM).*
    d. **Roadmap Project:** Select Yes or No from the drop-down menu to indicate if the project was identified on Education or Administrative Roadmap *(this will be prepopulated from the ROM).*
    e. **Project ID:** The project ID will be unalterable.
    f. **Priority:** Select a priority from the drop-down menu.
    g. **Project Name:** The project name will be prepopulated from the ROM and will be unalterable.
    h. **Date Added:** The date the project was approved display *(this will be prepopulated).*
    i. **Project Manager:** The users name will be pre-populated in the drop down ***(Warning:** If you select another Project Manager you will not be able to edit the project information).*
    j. **Custom Attributes:** This open text field is for custom CPT reporting and should only be edited by a member of the CPT.



The VIP, Roadmap Project, Project Name, and Project Manager fields are prepopulated. The Portfolio was preassigned by WPT and the Custom Attributes field is left blank for CPT reporting.

    k. **Description and Expected Outcomes:** Enter a concise project description and expectations. In many cases, this information can be copied or adapted from data in the ROM tab.
    l. **Work Type:** Select Major or Minor from the drop-down menu. Major projects generally, but not always, require a PM based on project size, complexity, or visibility *(this will be prepopulated from the ROM).*
    m. **Lifecycle State:** Select a lifecycle state from the drop-down menu.
    n. **Service Catalog:** If your project is related to a service, select the service from the drop-down.
    o. **Methodology:** Select Agile or Waterfall from the drop-down.



p. **CPT:** Select CPT team aligned with project *(this will be prepopulated from the ROM).*
q. **Primary Stakeholder:** Enter primary community contact or organization serving as the project stakeholder.