

Enterprise Project Management (EPM)

User Guide

(February 2017)



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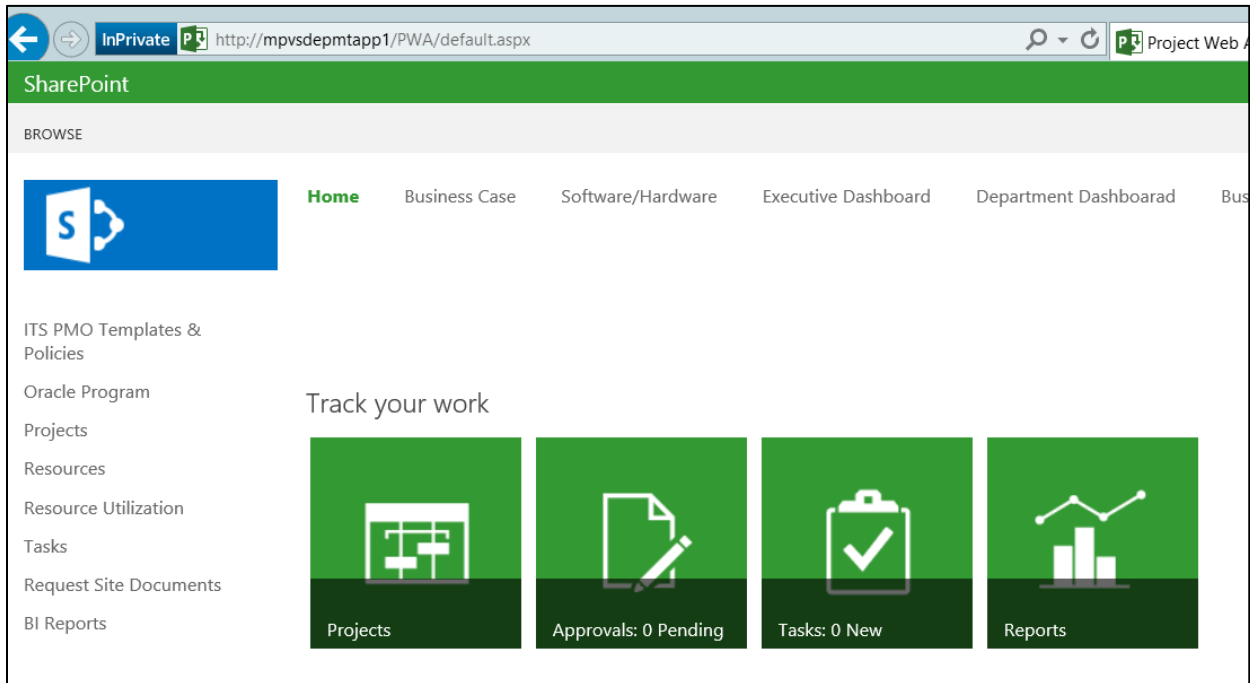
Training Guide

1. Project Server URL

<https://epm.qu.edu.qa/PWA/default.aspx>

2. Home Screen

Once you click on the above URL the following home screen will be shown.



3. Projects Center

Project Center is the view where the project manager will see all his/her created projects after the approval process.

The screenshot shows the Project Center interface. At the top, there is a navigation bar with links: Home, Business Case, Software/Hardware, Executive Dashboard, Department Dashboard, Business Case Approval, and Software/Hardware Approval. Below this is the 'Project Center' title and a timeline from November 8 to December 28, with 'Today' highlighted. A sidebar on the left contains various menu items like 'ITS PMO Templates & Policies', 'Oracle Program', 'Projects', 'Resources', 'Resource Utilization', 'Tasks', 'Request Site Documents', 'BI Reports', and 'EDIT LINKS'. The main area displays a table of projects.

Project Name	Project Type	Project Department	Owner	Project Health	Project Priority	Project Size
Project Departments:						
APLOA-Migration and upgradation of HW and SW	Project		Aamir Shaikh	●	High	Small
Blackboard Collaborate	Project		Noha Mohamed	●	Medium	Medium
danish direct test	Project		EBS Test1	●	Medium	Medium
Danish test 002	Project		Alaa Mohamed E	●	Medium	Medium
Danish Test 003	Project		EPMTSETUP	●	Medium	Medium
Danish test 004	Project		EPMTSETUP	●	Medium	Medium
Fahad Project	Project		EPMTSETUP	●	Medium	Medium
Oracle - Oracle Upgrade	Project		Alaa Mohamed E	●	Medium	Medium
Project Test A	Project		EBS Test1	●	Medium	Medium
QNREN Project188	Project		EPMTUserProfile	●	Medium	Medium
QU Project Template v1	Project		SVCSPFarm	●	Medium	Medium
Test Template 8-1-16	Project		EPMTSETUP	●	Low	Small
Project Departments: President and Vice Presidents						
26th November1	Project	President and Vi	EPMTSETUP	●	Medium	Medium
30th November 2014	Project	President and Vi	EPMTSETUP	●	Medium	Medium
Access Control Active Directory	Project	President and Vi	EBS Test1	●	Medium	Medium
Activity Insight Implementation	Project	President and Vi	Alanood Abdula	●	Medium	Medium

3.1 Inside the Project:

Click on any of the project the following pages will be shown.

3.1.1 Project Details:

Project details is the area where project manager can change the created fields throughout the project.

BROWSE PROJECT PAGE

Edit
 Save
 Close
 Project Site
 Build Team
 Documents
 Issues
 Risks
 Deliverables
 Resource Plan
 Project Permissions
 Previous
 Next

Project: APLOA-Migration and upgradation of HW and SW

Status: Checked-in Last Modified: 8/16/2016 1:10 AM

Project Details

Schedule
Project Dashboard
Weekly Status Report
View Status Report
Project Site
ITS PMO Templates & Policies
Oracle Program
Projects
Resources
Resource Utilization
Tasks
Request Site
Documents

Project Fields

Name * APLOA-Migration and upgradation of HW and SW

Description

Start * 3/24/2014

Finish Date 6/15/2014

Owner Aamir Shaikh

Assumptions and Dependencies All servers to be available within the project duration

Type of Project

Vendor

Estimated Budget

Contract/PO 0

3.1.2 Schedule:

Project schedule is the project plan of the project which can be updated from the Microsoft Project Professional as well as through the browser.

BROWSE PROJECT PAGE TASK OPTIONS

Home Business Case Software/Hardware Executive Dashboard Department Dashboard Business Case Approval Software/Hardware Approval Status Report Document Review

Schedule: APLOA-Migration and upgradation of HW and SW

Status: Checked-in Last Modified: 8/16/2016 1:10 AM Version: Published

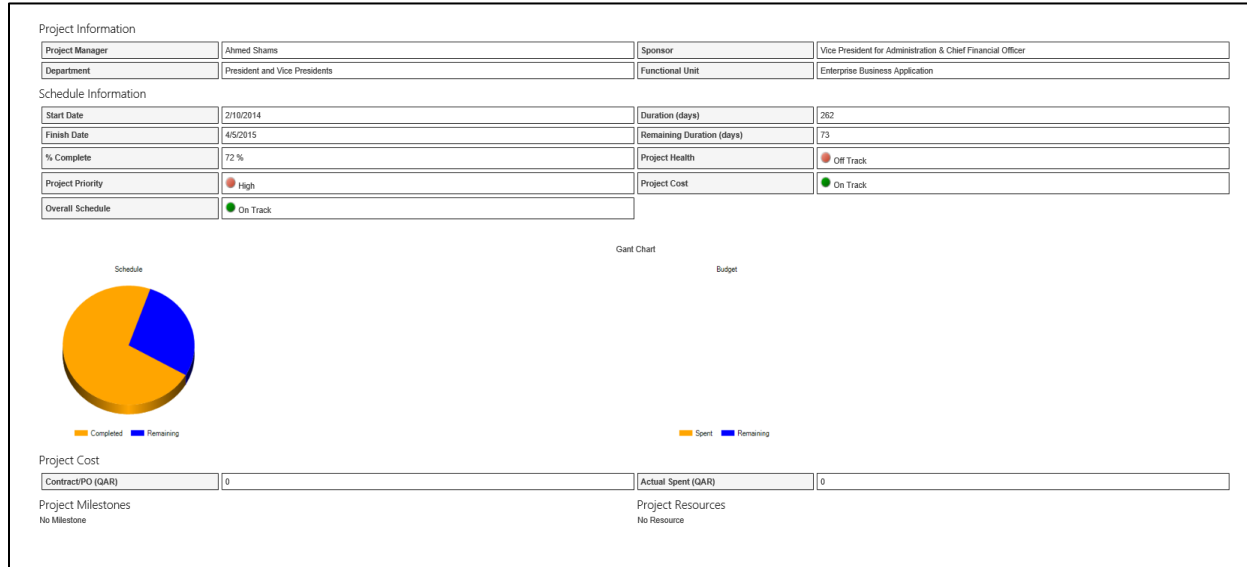
November 2016 Today December 2016 January 2017

Add tasks with dates to the timeline

ID	Mode	Task Name	Start	Finish	Actual Start	Actual Finish	Baseline Start	Baseline Finish	% Complete	C	3/23/2014	3/24/2014	3/25/2014	3/26/2014	3/27/2014	3/28/2014	3/29/2014	3/30/2014
1		• QU APLOA[Academ 3/24/2014	6/15/2014	3/24/2014	4/17/2014				100%	6								
2		Develop Project CI 3/24/2014	3/25/2014	3/24/2014	3/25/2014				100%	2i								
3		• Planning Phase 3/24/2014	4/17/2014	3/24/2014	4/17/2014				100%	1i								
4		Set Up Project Ei 4/15/2014	4/16/2014	4/15/2014	4/16/2014				100%	2i								
5		Specify Deliveral 4/17/2014	4/17/2014	4/17/2014	4/17/2014				100%	1i								
6		• Analysis Phase 3/24/2014	3/28/2014	3/24/2014	3/28/2014				100%	5i								
7		Architecture C 3/24/2014	3/24/2014	3/24/2014	3/24/2014				100%	1i								
8		Prepare Instar 3/25/2014	3/25/2014	3/25/2014	3/25/2014				100%	1i								
9		Document Ha 3/26/2014	3/26/2014	3/26/2014	3/26/2014				100%	1i								
10		Document I/C 3/26/2014	3/26/2014	3/26/2014	3/26/2014				100%	1i								
11		Consideration 3/27/2014	3/27/2014	3/27/2014	3/27/2014				100%	1i								
12		Other perform 3/27/2014	3/27/2014	3/27/2014	3/27/2014				100%	1i								
13		Document Sol 3/28/2014	3/28/2014	3/28/2014	3/28/2014				100%	1i								
14		Document sof 3/28/2014	3/28/2014	3/28/2014	3/28/2014				100%	1i								
15		• Implementatioi 3/24/2014	4/14/2014	3/24/2014	4/14/2014				100%	1i								

3.1.3 Project Dashboard:

The project dashboard will provide the current status of the project including schedule and cost information and overall project health.



3.1.4 Weekly Status Report:

Project managers have to update the stakeholders regarding the status of the project, what are actions for the next period and others. To do so the PM will need to submit his/her weekly status report as shown below. EPM automatically notifies the project manager.

BROWSE PROJECT PAGE SHARE FOLLOW

[Edit](#) [Save](#) [Close](#)
[Project Site](#)
[Build Team](#)
[Documents](#)
[Issues](#)
[Risks](#)
[Deliverables](#)
[Resource Plan](#)
[Project Permissions](#)
[Previous](#) [Next](#)

Project Navigate Page

Project Dashboard

Weekly Status Report

[View Status Report](#)

Project Site

ITS PMO Templates & Policies

Oracle Program

Projects

Resources

Resource Utilization

Tasks

Request Site

Documents

BI Reports

[EDIT LINKS](#)

Weekly Status Report

Major Accomplishments

Objectives for the Next Period

4. Business Case Workflow Approvals

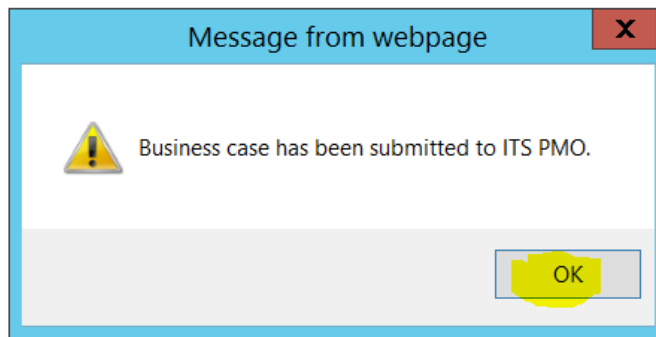
Click on the Business Case link from the top menu. Fill the fields and press Send Case button.

The screenshot shows a web application interface for a Business Case Form. At the top, there is a navigation menu with links: Home, Business Case (highlighted in yellow), Software/Hardware, Executive Dashboard, Department Dashboard, and Business Case Appr. The main heading is "Business Case Form". Below the heading, a note states "[*] are mandatory". The form consists of several fields:

- Title***: A text input field.
- Department***: A dropdown menu with "Please select" and a downward arrow.
- Sponsor***: A dropdown menu with "Please select" and a downward arrow.
- Functional Unit***: A dropdown menu with "Please select" and a downward arrow.
- Estimated Budget (QAR)***: A text input field.
- Expected Start Date***: A text input field.
- Expected Completion Date***: A text input field.
- Nominated Project Manager***: A dropdown menu with "Please select" and a downward arrow.
- Business Case Scope***: A rich text editor with a toolbar and a text area.
- Strategic Objective***: A rich text editor with a toolbar and a text area containing "Test". Below the text area, it says "max 500 characters".
- Stakeholders***: A rich text editor with a toolbar and a text area containing "Test". Below the text area, it says "max 500 characters".
- Attachment**: A text input field and a "Browse..." button.

At the bottom of the form, there are three buttons: "Send Case" (highlighted in yellow), "Cancel", and "Spell Check".

Once it is submitted the following message will be shown. Press OK in it.



4.1 PMO Approval Process (Step 1)

Here in this level PMO can do the following things:

1. Schedule Business Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved.

3. Reject:

- Request will completely be rejected.

4. Return for Clarification:

- From this option the form will be enabled to the initiator and can be submitted again after required changes are done.

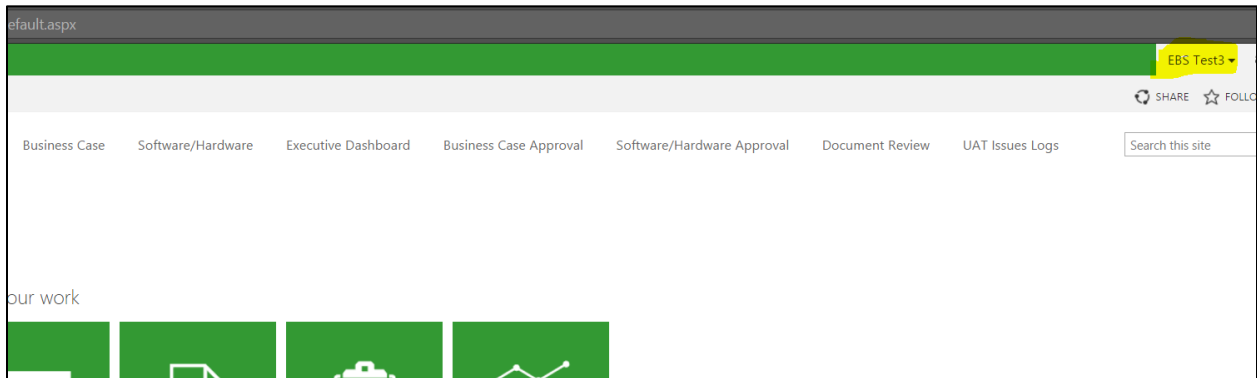
5. Assign BC to Director:

- If PMO selects Director name from the dropdown and selects approve from the options so the request will be redirected to the Director and will wait until the director's action.

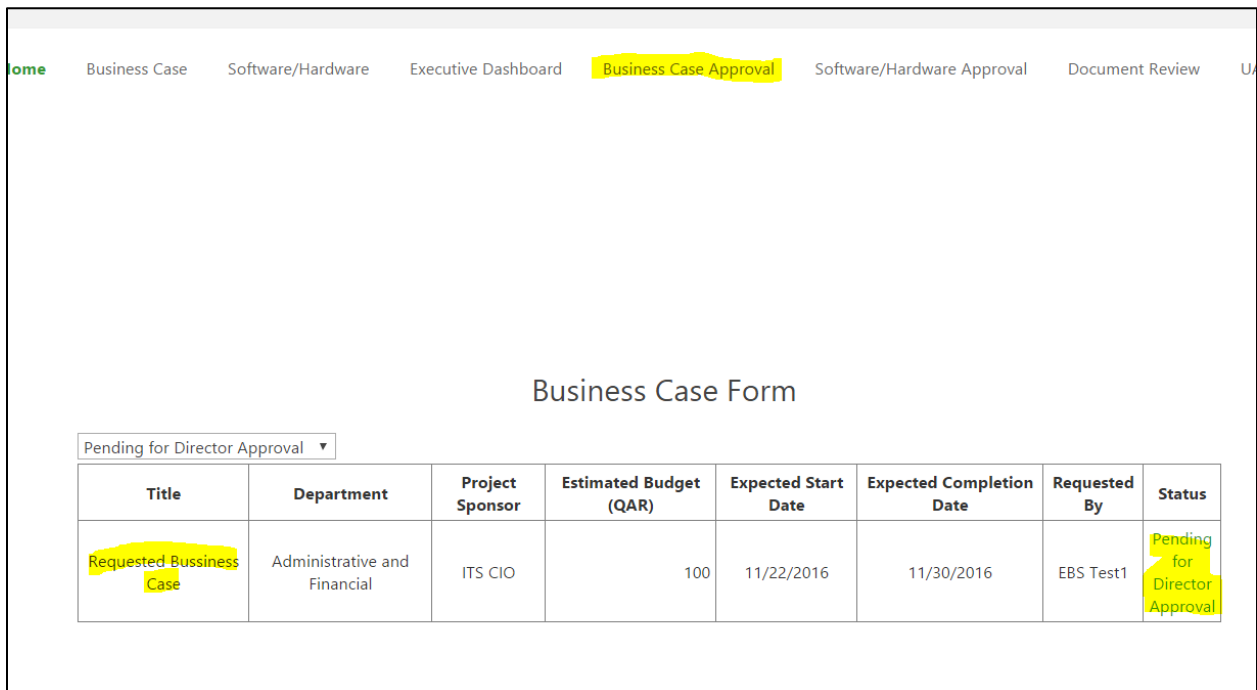
The following section will show the director view and actions.

4.2 Login as Director

As a director, the following screen will appear to you.



Click on the **Business Case Approval** link from the top.



Click on **Pending for Director Approval:**

Approved By	Action Taken	Approved Date	Comments
PMO Group	Approved	11-21-2016	ok Please Review
EBS Test3	Not Started	11-21-2016	

Comments

Schedule Business Case Presentation
 Approve Reject
 Return for Clarification

Here in this level Director can do the following things:

1. Schedule Business Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved and moved towards PMO for final approval.

3. Reject:

- Request will completely be rejected.

4. Return for Clarification:

- From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

4.3 PMO Approval Process (Step 2)

Here in this level PMO can do the following things:

1. Schedule Business Case Presentation

1.1. Email will be sent to the initiator for the Presentation.

2. Approve:

2.1. Request will be approved.

3. Reject:

3.1. Request will completely be rejected.

4. Return for Clarification:

4.1. From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

4.4 Creation of the Project:

Once the request is approved it will be shown in the **Approved** section of PMO view. But still the project will not be created. When suitable PMO will create the project and the requestor will be notified.

After the creation of the project from the Business Case. The project will be shown in the Project Center as shown below.

The screenshot displays the Project Center interface. At the top, there is a navigation bar with various icons for project management. Below this, a timeline view shows dates from November 9 to January. A table lists project details:

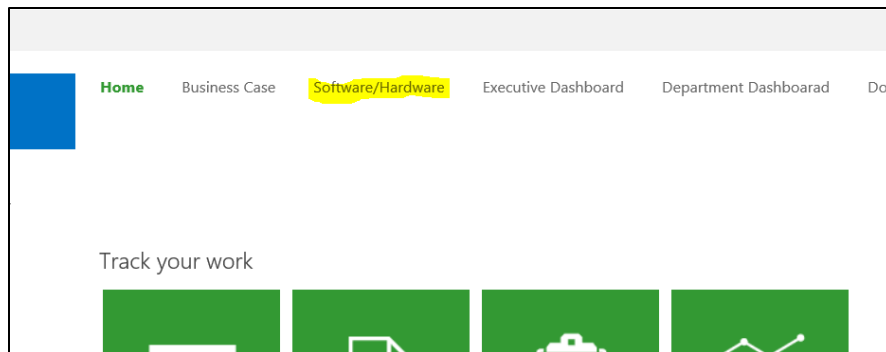
Project Name	Start	Finish	% Complete	Work	Duration	Owner	Last Published
Requested Business Case	11/22/2016	11/30/2016	0%	0h	5.25d	EBS Test4	11/21/2016

5. Software/Hardware Request

To initiate the Software/Hardware request user need to click the **Software/Hardware** link from the top menu.

In software/hardware form user can initiate two types of requests.

1. Equipment/License
2. Document Review.


















5.1 Equipment/License:

In the Equipment/License type and after all the approvals, a record will be created in the document library where the nominated Focal point can add the multiple attachment. This record will be visible to the approved focal point person.

As a requestor you will need to click on the Software/Hardware link from the top menu. Fill the fields and press **Send Request** button.

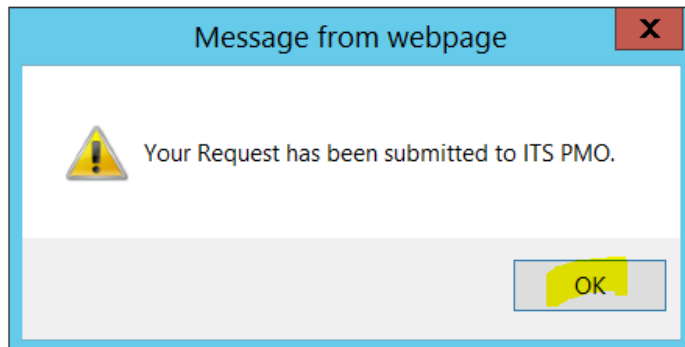
Request Form

[*] are mandatory

Title*	<input type="text" value="Requested Equipment and License"/>	
Request Type*	<input type="text" value="Equipment/license"/>	
Functional Unit*	<input type="text" value="Oracle Program"/>	
Department*	<input type="text" value="Institutional Planning & Development"/>	
Sponsor*	<input type="text" value="ITS CIO"/>	
Estimated Budget (QAR)*	<input type="text" value="123"/>	
Expected Start Date*	<input type="text" value="11/22/2016"/>	
Expected Completion Date*	<input type="text" value="11/25/2016"/>	
Nominated Focal point	<input type="text" value="EBS Test3"/>	
Request Description* max 500 characters	<div style="border: 1px solid #ccc; padding: 5px;"><p>Test</p></div>	
Constraints* max 500 characters	<div style="border: 1px solid #ccc; padding: 5px;"><p>Test</p></div>	
Stakeholders* max 500 characters	<div style="border: 1px solid #ccc; padding: 5px;"><p>Test</p></div>	
Attachment	<input type="text" value=""/> <input type="button" value="Browse..."/>	

After pressing the **Send Request** button, the following message will be shown.
Press OK to remove.

The request is pending with PMO. Software/Hardware requests will follow the same approval hierarchy.



5.1.1 PMO Approval Process (Step 1)

Here in this level PMO can do the following things:

1. Schedule Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved.

3. Reject:

- Request will completely be rejected.

4. Return for Clarification:

- From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

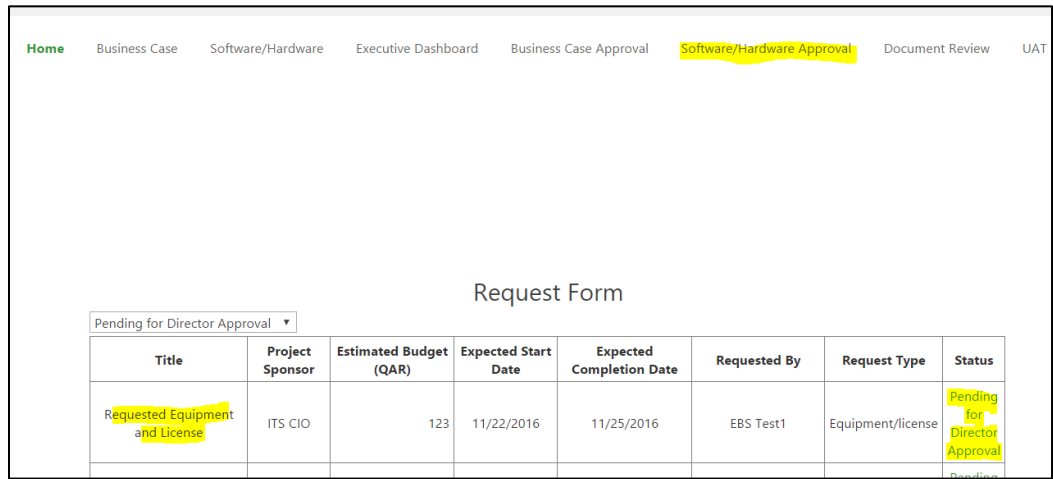
5. Assign Request to Director:

- If PMO selects Director name from the dropdown menu and selects approve from the options, the request will be redirected to the Director and will wait until the director's action.

The following section will show the director view and actions.

5.1.2 Login as Director

As a director, the following screen will appear to you.



The screenshot shows a web application interface with a navigation menu at the top. The menu items are: Home, Business Case, Software/Hardware, Executive Dashboard, Business Case Approval, Software/Hardware Approval (highlighted in yellow), Document Review, and UAT. Below the menu is a large empty space, followed by the title "Request Form". Underneath the title is a dropdown menu set to "Pending for Director Approval". Below the dropdown is a table with the following data:

Title	Project Sponsor	Estimated Budget (QAR)	Expected Start Date	Expected Completion Date	Requested By	Request Type	Status
Requested Equipment and License	ITS CIO	123	11/22/2016	11/25/2016	EBS Test1	Equipment/license	Pending for Director Approval

After clicking on the **Pending for Director Approval** link the following screen will be shown.

Request Description	
Deliverables	Test
Constraints	Test
Stakeholders	Test

Approved By	Action Taken	Approved Date	Comments
PMO Group	Approved	11-21-2016	ok by PMO
EBS Test3	Not Started	11-21-2016	

Schedule Case Presentation
 Approve Reject
 Return for Clarification

Comments

Here in this level Director can do the following things:

1. Schedule Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved and move towards PMO for final approval.

3. Reject:

- Request will completely be rejected.

4. Return for Clarification:

- From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

5.1.3 PMO Approval Process (Step 2)

Here in this level PMO can do the following things:

1. Schedule Business Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved.

3. Reject:

- Request will completely be rejected

4. Return for Clarification:

- From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

5.1.4 Folder Creation in Library:

Once the request is approved it will be shown in the **Approved** section of the PMO view. But still the folder will not be created. When suitable PMO will create the folder in the document library and the requestor will be notified.

5.1.5 Library Links:

Request site documents will be shown at the left bar of EPM page.

The screenshot shows the 'Request Site Documents' page in EPM. The navigation menu on the left includes: ITS PMO Templates & Policies, Oracle Program, Projects, Resources, Resource Utilization, Tasks, **Request Site Documents**, and BI Reports. The main content area features a '+ new document or drag files here' button, an 'All Documents' filter, and a search box labeled 'Find a file'. Below is a table of documents:

Name	Modified	Modified By	Created By
2-8-2016 EL	August 3	EBS Test5	EBS Test5
2June Test1	June 19	EBS Test5	EBS Test5
31 May EPM Test Request1	June 19	EBS Test5	EBS Test5
Final Test 22-6-16 Equipment	June 22	EBS Test5	EBS Test5
New Doument Review	June 19	EBS Test5	EBS Test5
Requested Equipment and License	3 minutes ago	EBS Test5	EBS Test5
Test July 20	July 20	Mutaz Oshi	Mutaz Oshi
Test RS	June 19	EBS Test5	EBS Test5
testt 26-6-2016	June 29	EBS Test5	EBS Test5

5.2 Document Review:

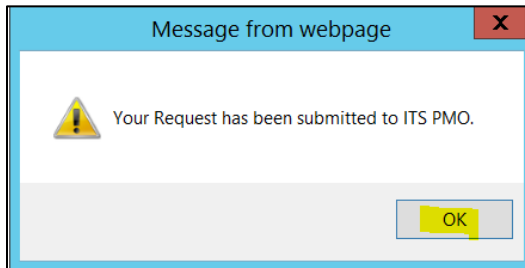
In the Document Review type, the approval hierarchy is same as Software/hardware. The little difference is the last step. In this process a request can be assigned to the selected users (reviewers).

The screenshot displays the 'Request Form' interface within the 'Software/Hardware' section of the EPM system. The navigation bar at the top includes 'Home', 'Business Case', 'Software/Hardware', 'Executive Dashboard', 'Department Dashboard', and 'Document Review'. The form title is 'Request Form', and a note indicates that fields marked with an asterisk (*) are mandatory.

The form fields and their values are as follows:

- Title***: Request Document Review
- Request Type***: Document Review
- Functional Unit***: Please select
- Department***: Please select
- Sponsor***: Please select
- Expected Start Date***: (Empty)
- Expected Completion Date***: (Empty)
- Nominated Focal point**: Please select
- Request Description***: (Empty text area)
- Constraints***: max 500 characters
- Stakeholders***: Test (max 500 characters)
- Attachment**: (Empty file input field with 'Browse...' button)

At the bottom of the form, there are three buttons: 'Send Request' (highlighted in yellow), 'Cancel', and 'Spell Check'. A vertical column of question mark icons is visible on the right side of the form, likely for help or information.



5.2.1 PMO Document Review Process (Step 1)

Here in this level PMO can do the following things:

1. Schedule Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved.

3. Reject:

- Request will completely be rejected.

4. Return for Clarification:

- From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

5. Assign Request to Director:

- If PMO selects Director name from the dropdown menu and selects approve from the options, the request will be redirected to the Director and will wait until the director's action.

The following section will show the director view and actions.

5.2.2 Login as Director

Business Case Software/Hardware Executive Dashboard Business Case Approval **Software/Hardware Approval** Document Review UA

Request Form

Pending for Director Approval ▾

Title	Project Sponsor	Estimated Budget (QAR)	Expected Start Date	Expected Completion Date	Requested By	Request Type	Status
Request Document Review	Vice President and Chief Academic Officer		11/23/2016	12/10/2016	EBS Test1	Document Review	Pending for Director Approval Pending

Constraints

Stakeholders

Test

Approved By	Action Taken	Approved Date	Comments
PMO Group	Approved	11-21-2016	Ok By PMO
EBS Test3	Not Started	11-21-2016	

Comments

Schedule Case Presentation
 Approve Reject
 Return for Clarification

Send Response Close

Here in this level Director can do the following things:

1. Schedule Case Presentation

- Email will be sent to the initiator for the Presentation.

2. Approve:

- Request will be approved and moved towards PMO for final approval.

3. Reject:

- Request will completely be rejected.

4. Return for Clarification:

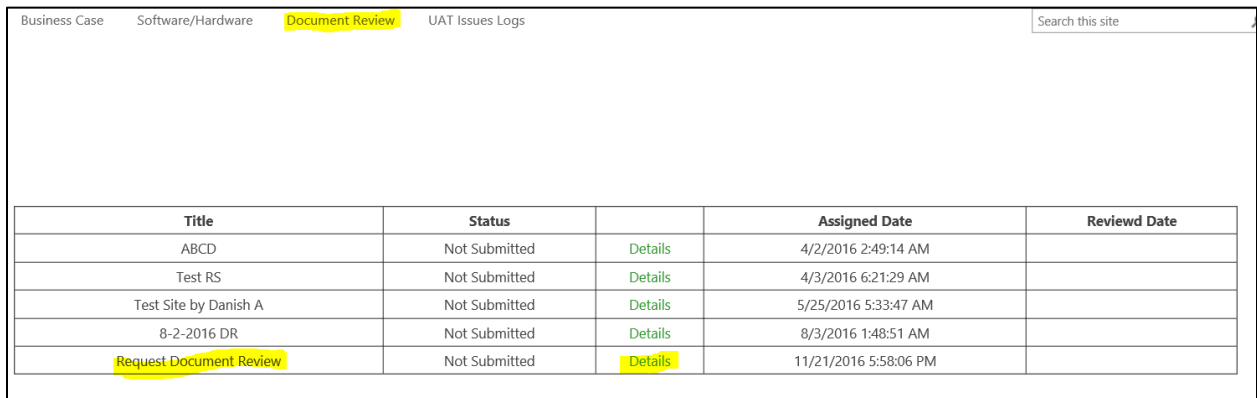
- From this option the form will be enabled to the initiator and can be submitted again after required changes are made.

5.2.3 PMO Document Review Process (Step 2)

Once request is approved, PMO can assign resources for review by assigning resources in Reviews section of the PMO view.

5.2.4 Login as a Reviewer

Login as a reviewer and click to the **Document Review** link from the top menu.



The screenshot shows a web application interface. At the top, there is a navigation menu with the following items: Business Case, Software/Hardware, Document Review (highlighted in yellow), and UAT Issues Logs. To the right of the menu is a search box labeled "Search this site". Below the menu is a table with the following columns: Title, Status, Details, Assigned Date, and Reviewd Date. The table contains five rows of data, with the last row highlighted in yellow.

Title	Status	Details	Assigned Date	Reviewd Date
ABCD	Not Submitted	Details	4/2/2016 2:49:14 AM	
Test RS	Not Submitted	Details	4/3/2016 6:21:29 AM	
Test Site by Danish A	Not Submitted	Details	5/25/2016 5:33:47 AM	
8-2-2016 DR	Not Submitted	Details	8/3/2016 1:48:51 AM	
Request Document Review	Not Submitted	Details	11/21/2016 5:58:06 PM	

Click to the **Details** link the following screen will be shown.

Request Document Review

Request Details View
Kindly Review the document.

PMO Comments
Everything is fine.

Comments
Everything is fine.

Attachment
C:\Users\EPMTSETUP\Desкто Browse...
Submit

5.2.5 Review the comments:

To see the reviewed comments by the reviewers. PMO need to login and click to **Software/Hardware Approval** link.

5.2.6 PMO Document Review Process (Step 3)

PMO can see the comments given by the reviewers. This is not the limit, PMO can assigned more reviewers as well.