03 Project Management

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Document Purpose

Describes the method to add, edit, update, delete and report on projects within the Planning and Budgeting database.

Adding a Project

• From the Area Summary page click on the Area Projects tab

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• Click on the Add Project button



This will open the Add Project Form

-8		Add a new project		-		\times
Add Project		Research and Planning	_			
laa Hojeet		Peter Cammish		Ex	ıt	
Project Title						
Project Desciption/Ratio	onale					
Priority Medium V Fu	nding Source No	ne Required			_	
Relevancy Project Act	ivities Outcomes	and Evaluation Archive		A8 V	>	
Area Outcome Suppo	rted		~			
Institutional Outcome	e Supported		\sim			
Related Priority			\sim			
EMP Outcome Support	rted		\sim			
Division			\sim			
Accreditation Standar	rd		\sim			
How are Outcomes Su	pported					
					_	

Record the following information about your outcome

Project title: A short 255 or less character title that describes your outcome

Project Description/rationale: A description of what the project will achieve and why it is needed

Under the Relevancy Tab

Use the drop down boxes to specify how the project relates to various strategic goals and objectives

Area Outcome Supported

Institutional Outcome Supported

Related Priority

EMP Outcome Supported

Division: EMP Division

Accreditation Standard

A short description of how the Outcomes are supported

Under the Project Activities Tab

Add new Activities

Click on the Add Activities button

Add Activities

This will open the Add Project Activities form

-8	Add Project Activities				
Add Project A	ctivities		Sav	/e	
-					
Project Title New Pro	ject				
Activity					
Completion Date	Spring 2017	✓ Complete □			
Area Responsible	Research and Planning	~			

Enter

Activity: What you will be doing

Completion Date: The semester you expect to finish

Area Responsible: The area that will primarily be responsible for this activity.

• Click Save to add the new activity to this project plan.

The activity will be added to the Project Activities table.

Activity Title	Owner	Completion	Completed
Download Data from CCCCO Website	Local	Fall 2011	Yes
Design interactive pages	Local	Fall 2012	Yes
Test and publish website	Local	Fall 2012	Yes
Fall 2012 Update	Local	Fall 2012	Yes
Publish Fall 2012 on web	Local	Fall 2012	Yes

You can repeat these steps to add as many activities as you need to you project plan.

Viewing Activities Assigned from Other Areas

When you add ab activity to your project you can select the Area Responsible as either your own area or another area. Similarly another Area may select your area as responsible for an activity in one of their projects. You can view activities (and projects) that have been assigned to you by other areas.

• From the Area Summary page click on the Other Activities tab

Area Outcomes	Area Project	Other Activities	Program Review	Budget Requests	Other Reque	sts
Activities in ot	ner Area Proje	ects		Only Show Compl	eted Tasks	
Area	Proj	ect Title	Activity Title	Compl	ete By Co	mpleted
Risk Managem	ent tese		test2	Spring	2016 No)

This list all of the activities that have been assigned to you from other areas. You can use the check box upper right to view either completed or incomplete activities.

Click on any of these Activities

This will open the Activity form

	Project Activ	vities			×
Project Activ	vities	Viev	v Project	Exit	
Activity	test2				
Completion Date	Spring 2016	~	Complete		
Area Responsible	Research and Planning	~			

To mark complete – click on the Complete check box

To view full details of the project click the View Project button

This will show you the full details of the project that you are contributing to.

Under the Outcomes and Evaluations Tab

Under this tab add:

- Outcomes: What changes you expect to see as a result of completing this project.
- Evaluation: What changes you actually did see as a result of completing this project.

Under the Archive Tab

You can use this tab to 'archive' your project or delete it completely.

The archive saves all the details of the project to a separate archive. The archived record is not included on any reports. An archived project plan can be unarchived very easily.

Alternatively you can completely delete a project plan. This action will delete all of the information associated with the project, this action is irreversible.



You can check the spelling of your input text using this button

When you are finished click Exit to save your project to the database and return to the Area Summary screen

Editing a Project

Once a project has been added to the database you can edit the details of that project as required.

• From the Area Summary page click on the Area Projects tab

Area Sumr	mary						Exit	
rea	Reso	Research and Planning			Area type Non-Academ		ademic	-
lanager	Pete	Peter Cammish						
lission		rch and Planning will p Il ensure that the distr						
Area Outcomes	Area Projects	Other Activitie	Progr	am Review	Budget R	equests	Other R	equests
This area is wo	rking on the fo	llowing projects						A
Project Title		End Se	mester	Total Activ	rities	Status		*
Add interactive	e data web paj	es Fall 20	12	5		Comp	lete	111
IPP Database	0.0500.00	Spring	2013	5		Comp	lete	
Data Manipula	tion Training	Spring	Spring 2013		5		lete	
IPP Database V	2.0	Fall 20	13	1		Comp	lete	
		Fall 20	13	3		Comp	lete	v

• Click on the Project that you want to edit

This will open the Edit Project form, you can edit

Any of the projects Relevancy tags

Add, edit or delete project activities

Update project Outcomes and Evaluation text

Archive or Delete the project

Archiving and Deleting a Project

- From the Area Summary page click on the Area Projects tab
- Click on the Project that you want to delete or archive
- Select the Archive Project tab

To archive

Check the Archive box

Select the Archive reason from the drop down box

Archive 🗹	
Archive Reason	
Not Funded	~

To delete

Press the Delete Project button

Delete Project

Viewing Activities Assigned from Other Areas

When you add ab activity to your project you can select the Area Responsible as either your own area or another area. Similarly another Area may select your area as responsible for an activity in one of their projects. You can view activities (and projects) that have been assigned to you by other areas.

•	From the Area Summary page	click on the Other Activities tab
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Area Outcomes	Area Projects	Other Activities	Program Review	Budget Requests	Other Re	quests
Activities in oth	ner Area Proje	cts		Only Show Compl	leted Task	s
Area	Proje	ct Title	Activity Title	Compl	ete By	Completed
Risk Managem	ent tese		test2	Spring	2016	No

This list all of the activities that have been assigned to you from other areas. You can use the check box upper right to view either completed or incomplete activities.

Click on any of these Activities

This will open the Activity form

	Project Acti	vities		×
Project Activ	/ities	View Project	Exit	
Activity	test2			
Completion Date	Spring 2016	~ Compl	ete 🔲	
Area Responsible	Research and Planning	~		

To mark complete – click on the Complete check box

To view full details of the project click the View Project button

This will show you the full details of the project that you are contributing to.

Reporting on Projects

Reporting on All Projects

• From the Area Summary page click on the Area Projects tab

Above the projects List you will see the Print all Projects button



• Click on the Print all Projects button

This will open up a report that will print all outcomes and assessments associated with the current area.

Starting in Fall	2011			
PP Database				
Sevelop and distribute	PP database which includes	data collection and reporting a	spedifier	
			This project sure from	Fall 2013 In Spring 2053
This project supports the outcomes		Participate in IPP	init 4.1 Support	t Institutional Effectiveness
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	entrype	Fel 313.1	Teament and Teaming	N 10
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Add interactive da	implemented. The major on	e will be the ability to record non-	a runter of charges to the	datahase need to be
Add interactive da	implemented. The major on ta walk pages website their aftere warrs to in	e will be the ability to record non-	a rumlar of charges to the space of program the even This project sure from	datahase need to be
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Add Interactive da Idd data pages to the This project support State Stat	inglemented. The major of ta web pages website that allow users to in a the outcomes as Tex	e will be the addity to record rows denuel with major dula arts. Access and interpret Data Language Data	a rumber of charges to the cachinic program review This propert runn from with 4.2 Maximum kine bageweber	dealase rend to be Rati 2012 to Rati 2012 or Institutional (Plective ress Convenient to B
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Reporting on Individual Outcomes

- From the Area Summary page click on the Area Projects tab
- Click on the Project that you want to print.

This will open the Edit Project form

In the header of this form you will see the Print Project button

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• Click on the Print Project button

This will open up a report that will print the selected project only

You can also email a PDF of the selected project

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Click on the Email Project Details button

A PDF will be created and attached to an email.