

Activity and Project Code Management

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Document Owner: Director, Capital Program Development and Management

1. Scope

This process applies to the management of global project and activity codes in the Project Management and Reporting System (PMRS). This process is a complement to the Activity and Project Code Management Process Map.

2. Purpose

This document establishes a WSDOT standard methodology for the management of global project and activity codes in the Project Management and Reporting System (PMRS).

3. Roles and Responsibilities

The identified roles are provided as a guide to assigning the tasks included in the PMRS processes. Each region has the flexibility to delegate the role of Project Manager (and other functions) to the appropriate functional level to meet project and project office needs and to accommodate current and planned organizational structures.

- 3.1 Project Engineer/Project Manager (PE/PM) and Specialty Groups
 - Determine needs for new global project and activity codes.
- 3.2 Team Lead/Project Control Specialist
 - Determine needs for new global project and activity codes.
 - Maintain project specific codes.
 - Request code additions from PMRS Configuration Management Team.
- 3.3 Configuration Management Team (CMT)
 - Reviews requests for new global project and activity codes and determines whether new codes are required.
 - Maintains global project and activity codes.

4. Activity and Project Code Management Process Steps

The following process steps are taken from the Activity and Project Code Management Process Map. The sub-numbers listed below correspond to the numbered activity on the process map. For example, item 4.1 corresponds to activity 1 of the process map.

- 4.1 **Determine the Need for Activity or Project Code Changes**
Project Engineer/Project Manager (PE/PM) and Specialty Groups:
- Determine if a new global activity or project code is required to meet project management or reporting needs and inform project control staff responsible for scheduling.
- 4.2 **Determine the Need for Activity or Project Code Changes**
Team Lead/Project Control Specialist:
- Determine if a new global activity or project code is required to meet project management or reporting needs. Codes are used to group, sort or filter data. If a code does not exist, one can be added to achieve the data manipulation desired.
 - Review requests for new global activity or project codes from the Project Team.
- 4.3 **Is Code Needed for Repetitive Reporting?**
Team Lead/Project Control Specialist:
- Determine if the requested activity or project code is needed for repetitive reporting over multiple periods or if the code is needed for one-time use.
- 4.4 **Complete Change Request Form**
Team Lead/Project Control Specialist:
- If a new code is required, complete Change Request Form and forward to the PMRS Configuration Management Team (CMT).
 - Indicate if the request applies to activity or project codes, possible values and an explanation of how the code will be used.
- 4.5 **Is Code Redundant or Duplicative**
Configuration Management Team (CMT):
- Determine if the requested code already exists or is very similar to an existing code that could satisfy the code request.
- 4.6 **Reject Code Request with Explanation**
Configuration Management Team (CMT):
- If the requested code is redundant or duplicative or otherwise unacceptable, the PMRS Configuration Management Team (CMT) rejects the request along with an explanation for the rejection.
- 4.7 **Add Custom Code to Database**
Team Lead/Project Control Specialist:
- If the requested code is needed for one-time reporting, project control staff responsible for scheduling will add the needed codes to the project custom code database. The codes will be available only to those with access to the project.

- 4.8 Add Global Code to Database
Configuration Management Team (CMT):
- If the code request is accepted, the PMRS Configuration Management Team (CMT) approves the activity or project code.

PMRS P6 Systems Engineer:

- Adds the activity or project code to the global code database.

- 4.9 Update Code Report

PMRS P6 Systems Engineer:

- Updates the code library with the new code(s) and notifies the PMRS Configuration Management Team.

Configuration Management Team (CMT):

- Notify requestor the code has been added.

5. Term

This standard is effective immediately upon signature and continues in force until modified in writing by the Director, Capital Program Development and Management, or his/her designee.

6. Exemptions

Variance from this process requires approval of the Director, Capital Program Development and Management, or his/her designee.

7. References

- 7.1 Executive Order Number: E 1032.01 – Project Management, July 1, 2008
- 7.2 Executive Order Number: E 1042.00 – Project Management and Reporting System, July 1, 2008
- 7.3 Project Management Web Portal. Copies of all PMRS policies, processes, procedures and guidance documents are available here: <http://wwwi.wsdot.wa.gov/Projects/PMRS>
- 7.4 Activity and Project Code Management Process Map
- 7.5 Change Request Form, available through the Configuration Management Team