Activity and Project Code Management

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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.


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
Activity & Project Code Management Process

The identified roles are provided as a guide to assigning the tasks included in the PMRS processes and procedures. 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.

Process map serves as an overview of the process. Refer to the applicable detailed process document for more information.

Legend

Predefined Process
Process
Decision
Report
Data
Start/End
Note

PE/PM/Team Lead / Project Control Specialist / Specialty Groups

1. Determine need for activity or project code changes
2. End users use codes to group, sort or filter data of various kinds. If a code does not exist, one can be added to achieve the data manipulation desired.
3. Will code be used for a report more than once or over multiple periods?
4. Complete Change Request Form
5. CMT determines if code already exists or is very similar to an existing code. This will help maintain consistency in the database
6. Is code redundant or duplicative?
7. Add custom code to database
8. End user adds code on their system only. This code will not be useable by anyone else.
9. Updated Code Report

Configuration Management Team (CMT)

1. CMT informs requester that code is already present or similar to an existing code
2. Reject code request with explanation
3. Is code needed for repetitive reporting?
4. Complete Change Request Form
5. CMT determines if code already exists or is very similar to an existing code. This will help maintain consistency in the database
6. Is code redundant or duplicative?
7. Add custom code to database
8. Code and code values are approved by the CMT. The PMRS P6 Systems Engineer adds the code to the database.
9. Updated Code Report

Regional Tools Administrators

1. Project staff and/or Specialty Groups determine that a new activity or project code is needed
2. Determine need for activity or project code
3. Will code be used for a report more than once or over multiple periods?
4. Complete Change Request Form
5. Indicates if it is activity or project code, the possible values for the code and explains what it is used for
6. Is code redundant or duplicative?
7. Add custom code to database
8. End user adds code on their system only. This code will not be useable by anyone else.
9. Updated Code Report