

PMBOK Guidelines Supported in Project InVision PPM

Project InVision Project Portfolio Management (PPM) supports all aspects of the project management guidelines as defined in PMBOK (3rd Edition). The following chart lists the PMBOK guidelines with their chapter references on the left and the Project InVision PPM features that support those guidelines on the right. In many cases there are several different features that support any given guideline, which provides tremendous flexibility in how an individual company can implement their PPM process.

PMBOK Guide (chapter references)	Project InVision PPM features
2. Project Life Cycle and Organization	
2.1 The Project Life Cycle	<p>Projects are divided up into phases by the Projects Module Workflow Automation and Project Stage Gates. The sequencing and automation of each phase can be changed, and new phases can be introduced or removed as needed to support any individual organization.</p>
2.2 Project Stakeholders	<p>The Portfolio Manager has eight pre-configured user roles which represent varying levels of stakeholders. New roles can easily be created to provide greater granularity of security, control, and approvals to meet the needs of any environment.</p> <p>The Stakeholder Analysis document template and Projects module Stakeholder detail page record project stakeholders for any individual project.</p>
2.3 Organizational Influences	<p>Organizational Systems: Portfolio Manager Workgroups allow organization of your projects into any corporate, government, or educational organization system.</p> <p>Organization Size: The scalable environment and licensing mean that the product can address any organization size.</p> <p>Organization Maturity: Customization of the product allows us to provide tools for any level of organization maturity. Turn on and off functionality to suite your maturity goals.</p> <p>Organizational Culture: The high degree of product customization will provide flexibility of process, terminology, approval requirements, etc. to fit in with your culture and style.</p> <p>Organizational Structure: Workflows and user roles combine to support your specific organizational structure, be it functional, projectized, weak matrix, balanced matrix, strong matrix, or composite.</p>

3. Project Management Process	
3.1 Project Management Process	The Plan-Do-Act-Check cycle is supported throughout all of the modules, with each module having its own distinct version of this cycle incorporated in its data and workflow.
3.2 Project Management Process Groups	Each module contains its own unique workflow automation which provides detailed, controlled, predictable, and auditable tracking for that module. While this automation can be correlated to the project phases, they do not have to be. They can remain independent sub-cycles within each functional area.
3.3 Process Interactions	<p>Handoffs, such as documents, issues, or action items, are tracked along with their owners, changes, and approvals.</p> <p>The transition from one process stage gate to another are not "hard coded." The transition is left to the discretion of the PM and Sponsor as to when a project has moved from one stage to the next. Thus, the interaction between processes is allowed to continue unconstrained by the formal named project stages.</p>
3.4 Project Management Process Mapping	The standard mapping of project management processes to the process groups and knowledge areas is supported in the default standard workflow configuration.
4. Project Integration Management	
4.1 Develop Project Charter	The project charter is recorded either in the Projects module > Project Charter detail page, or by using the Project Charter document template.
4.2 Develop Preliminary Project Scope Statement	The project preliminary scope can either be recorded in the Projects module > Assumptions, Assigned Team, Stakeholder, Key Deliverables, and Notes pages detail pages, or by using the Project Scope document template.

<p>4.3 Develop Project Management Plan</p>	<p>The Project Management Plan can be addressed in several different manners; the more mature organizations would document an approved plan as a Project Management Plan template and then create a document from this template automatically as part of the Project module workflow automation; for a less mature organization you may want to simply record your adherence to a published plan on the Project Module > Notes detail page in the Project Module > Project Charter page. How you define the Project Management Plan is up to the individual organization, but can be handled through this product in a multitude of ways.</p> <p>Many templates exist in this product to assist project managers in completing their Project Management Plans. These plans include:</p> <ul style="list-style-type: none"> • Quality Plan • Communications Plan • Continuous Improvement Plans • Procurement Plan • Risk Management Plan • Staff Management Plan
<p>4.4 Direct and Manage Project Execution</p>	<p>The Portfolio Manager has many different tools to assist project managers in their management of the project execution. Through the robust project tracking, project managers can produce evidence of deliverables status, requested change status, and requested, approved, and implemented changes, corrective actions, preventative actions, and defects, as well as track individual work performance.</p> <p><u>Communication:</u></p> <p>The Portfolio Manager provides automatic notification of assignments, approvals, and exceptions (through both emails and internal alerts).</p> <p><u>Visibility:</u></p> <p>The Portfolio Manager increases visibility into the project and the project team member actions through custom portals, reports, dashboards, views, and filters as well as approval tracking.</p> <p><u>Actionable:</u></p> <p>The Portfolio Manager ensures that all items are actionable—any item in the system can be assigned to anyone in the enterprise resource database. This assignment is recordable and searchable.</p> <p><u>Change Management:</u></p> <p>The Portfolio Manager empowers project managers by incorporating change management into every module, with special emphasis on the Scope Management module. In addition, the Defects module, Issues module, and Action Items module all track potential changes to the project.</p>

4.5 Monitor and Control Project Work	<p>Monitor project processes by collecting, measuring, and disseminating project information through a variety of product features:</p> <p><u>Communication:</u></p> <p>The Portfolio Manager provides automatic notification of assignments, approvals, and exceptions (through both emails and internal alerts).</p> <p><u>Visibility:</u></p> <p>The Portfolio Manager increases visibility into the project and the project team member actions through custom portals, reports, dashboards, views, and filters as well as approval tracking.</p> <p><u>Actionable:</u></p> <p>The Portfolio Manager ensures that all items are actionable—any item in the system can be assigned to anyone in the enterprise resource database. This assignment is recordable and searchable.</p> <p><u>Change Management:</u></p> <p>The Portfolio Manager empowers project managers by incorporating change management into every module, with special emphasis on the Scope Management module. In addition, the Defects module, Issues module, and Action Items module all track potential changes to the project.</p>
4.6 Integrated Change Control	<p>Change management is incorporated into every module through custom workflows, with a special emphasis on the Scope Management module.</p> <p>Variance reports determine the variance from baseline in the project budget or schedule and can alert a project manager to the need to implement changes.</p>
4.7 Close Project	<p>The Project Closure Checklist and the Project Closure Report template guide you through the procedure for proper project close. Optionally, approvals can be required for project close.</p>
5. Project Scope Management	
5.1 Scope Planning	<p>Scope planning is accomplished through the Scope Management module and the Preliminary Project Scope document template.</p>
5.2 Scope Definition	<p>Scope definition is recorded on the Scope Management module > Information detail page.</p>
5.3 Create WBS	<p>The work breakdown structure is created by tying the Scope Management items can be directly to the Tasks in the Tasks Module.</p> <p>Additionally, both the Project module and the Tasks module list the project Key Deliverables as shorthand for viewing the work breakdown structure of the project.</p>

5.4 Scope Verification	Scope verification is maintained through both the Scope module > Approvals detail page and the Deliverables Sign-Off document template.
5.5 Scope Control	Scope control is provided through the Scope Module > Scope Change workflow.
6. Project Time Management	
6.1 Activity Definition	Activity definition is provide through MS Project Plan templates, Project reports and Scope Management reports
6.2 Activity Sequencing	Activity sequencing is provided through the Tasks module and MS Project synchronization.
6.3 Activity Resource Estimating	Activity resource estimating is provided through the Team module, through Resource analysis charts/reports, and through MS Project analysis features.
6.4 Activity Duration Estimating	Activity duration estimating is provided through the Tasks module and MS Project synchronization.
6.5 Schedule Development	Schedule development is accomplished through the Tasks module (stand alone), or through the Tasks module along with MS Project synchronization
6.6 Schedule Control	Schedule control is provided through the user of the Portfolio Manager Tasks module directly, or through the Tasks module in synchronization with a specified MS Project Plan file. In addition, there is a layer of security built into both methodologies, which controls the adding/viewing/editing of schedule information base on user roles.
7. Project Cost Management	
7.1 Cost Estimating	Project cost estimations are available through features in the Projects module, Tasks module, Enterprise Resource database, as well as MS Project tools through MS Project synchronization with the Portfolio Manager.
7.2 Cost Budgeting	Project budgeting is provided through features in the Projects module, Tasks module, Enterprise Resource database, as well as MS Project tools through MS Project synchronization with the Portfolio Manager.
7.3 Cost Control	Project cost control is provided through features in the Projects module, Tasks module, Enterprise Resource database, as well as MS Project tools through MS Project synchronization with the Portfolio Manager.

8. Project Quality Management	
8.1 Quality Planning	Quality planning is accomplished through the Quality Assurance Plan template
8.2 Perform Quality Assurance	Application of the quality plan is tracked through the Scope module > Scope Change workflow, Risks module > Mitigation Plans detail page, Issues module, Defects module, automatic notifications, and required approvals. All of these features can be used for effective assignment, tracking, and verification of quality assurance activities.
8.3 Perform Quality Control	Unsatisfactory project results can be handled through the Issues or Defects modules, depending on your level of maturity. Reports for these modules ensure proper communication of the project quality status.
9. Project Human Resources	
9.1 Human Resource Planning	Identification of roles, responsibilities, and reporting relationships is performed in the Roles and Responsibilities matrix template, Project Scope template (organization chart), and Team module reports (resource utilization and availability). In addition, the product supports multiple skill listings for each enterprise resource, allowing for more thorough resource analysis and utilization.
9.2 Acquire Project Team	The Define Project Team function records the acquisition of the project team.
9.3 Develop Project Team	Project team competencies and interaction are increased through centralized project information (so that all team members see the same information at the same time), the Project Forum (for team discussions), and Internal Notes detail pages (for private team-only communications.) As the organization maturity level increases, the use of project reviews and lessons learned provide a rich learning environment for the less experienced members of the team.
9.4 Manage Project Team	Project team member management is provided through a variety of features, including: an auditable trail of ownership and performance of every item (scope, tasks, risks, action items, issues, defects, documents, and lessons), automated notifications of assignments and exceptions, and detailed reporting come together to form a solid picture of individual performance.

10. Project Communications Management	
10.1 Communications Planning	Determining the information needs of stakeholders is guided and recorded through the Communications Plan template.
10.2 Information Distribution	Distribution of project information is performed through pre-configured and customizable reporting, automatic notifications, user role defined views, filters, portals, and dashboards.
10.3 Performance Reporting	Collecting and distributing performance information is performed through pre-configured and customizable reports, views, filters, portals, and dashboards focused on performance (including costs, schedule, budget, status).
10.4 Manage Stakeholders	Collecting and distributing performance information to stakeholders is performed through the same features as the performance reporting. However, as with all aspects of this product, even the reporting can be tailored to the needs of specific user roles. Therefore, based on the type of stakeholder, the person will see information specifically filtered and presented for their specific role.
11. Project Risk Management	
11.1 Risk Management Planning	The approach, the plan, and how you will execute your project risks management is documented using the Risk Management Plan template.
11.2 Risk Identification	Identify risks which might affect the project and documenting their characteristics takes place in the Risks module > Identification detail page.
11.3 Qualitative Risk Analysis	Prioritizing risks for further analysis or action is performed on the Risks module > Analysis detail page.
11.4 Quantitative Risk Analysis	Analyzing the effect of a risk on the overall project objectives is recorded on the Risks module > Analysis detail page.
11.5 Risk Response Planning	Developing options and actions to enhance risk opportunities and reduce threats to project objectives is performed on Risks module > Mitigation plan detail page.
11.6 Risk Monitoring and Control	Tracking risk is performed through the Risks module > Monitoring and Resolution detail pages, risk reports, views, portals, dashboards, and automatic notifications.

12. Project Procurement Management	
12.1 Plan Purchase and Acquisitions	Determining what to acquire, when, and how is guided using the Equipment and Supplies Worksheet and the Procurement Plan template.
12.2 Plan Contracting	Identifying potential sellers is performed through the Equipment and Supplies Worksheet, the Procurement Plan template, and is finally recorded in the Procurement module > Vendor Evaluation detail page.
12.3 Request Seller Responses	Recording seller information, quotes, bids, offers or proposals takes place in the Procurement module > Information detail page.
12.4 Select Sellers	Reviewing offers, choosing among potential sellers, and negotiating a written contract takes place in the Procurement module detail pages, views, and filters.
12.5 Contract Administration	Contract administration is recorded in the Procurement module (inspections, audits, and payments) and Documents module (the physical contract itself.)
12.6 Contract Closure	Contract closure is recorded in the Procurement module and, if needed, in the contract itself located in the Documents module

ABOUT PROJECT INVISION INTERNATIONAL

Project InVision International provides software solutions to improve business performance to professional service firms and their clients including industry leaders like PricewaterhouseCoopers, KPMG International, AT&T, EDS, and TELUS. Project InVision's enterprise and on-demand platforms help businesses automate processes such as Project and Portfolio Management, Governance, Risk and Compliance, and Professional Services Automation. Project InVision International, founded in 1991, is privately held and headquartered in the San Francisco Bay area.

