



AMD IT Project Lifecycle: Getting Started with Your Project

November 2006

Version 1.0

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1.0 DETERMINE YOUR PROJECT'S COMMON INFORMATION

Once your project has received funding (Gate 0: Request for Investment), the first step in starting your project is categorizing it. Use the Project Categorization Guidelines (found in the Project Categorization Guidelines Quick Reference Guide) to determine whether your Type of Project is Large or Small.

As the Project Manager, you should also identify the Project Sponsor, Initial Project Team, Project Steering Committee and anticipated start date for your project. All of this information will be entered while creating a Gate Tracking Log for your project. Either the IT Manager or designated Project Manager will create the first entry for the Gate Tracking Log.

Quick Reference Guide

Project Categorization Guidelines

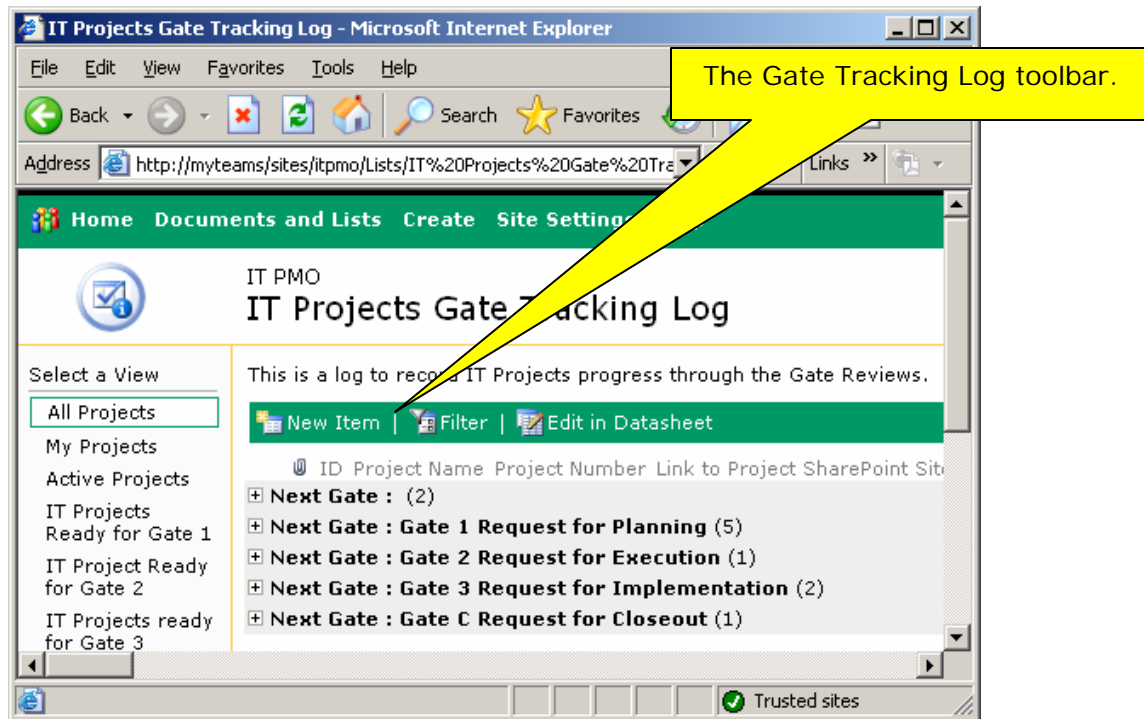
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2.0 CREATE A GATE TRACKING LOG FOR YOUR PROJECT

The Gate Tracking Log is an online tool used to track your IT Project's progress through the Gate Reviews of the AMD IT Project Lifecycle. This is where you will initially enter your project's common information.

How to Create a Gate Tracking Log Entry

1. On the IT PMO SharePoint site (<http://myteams/sites/itpmo/default.aspx>) under **Project Manager Toolkit**, click **Gate Tracking Log**.
2. In the Gate Tracking Log toolbar, click **New Item**.



3. Complete the **Common Information** form fields. This is where you indicate **Type of Project** – Large or Small – based on your Project Categorization.
4. Complete the **Gate 1: Request for Planning** form fields. This is where you indicate the key people involved with your project and the project's start date.
5. In the Gate Tracking Log toolbar, click **Save and Close**.

Quick Reference Guide

Creating the Gate Tracking Log

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3.0 REQUEST A SHAREPOINT SITE FOR YOUR PROJECT

Once your project has passed through the first Gate (Gate 1: Request for Planning), you will need to set up the basic components for initiating your project development, such as a SharePoint site unique to your project. This SharePoint site will be where your Project Team collaborates, stores artifacts and maintains a general knowledgebase throughout the life of the project.

How to Request a SharePoint Site for Your Project

1. On the AMD Online home page (<http://amdonline.amd.com/corpinfo/>), go to **My Tools** → **myITHelp**.
2. On the IT Service Desk page, click **Request a Service** from the left menu pane.
3. On the Request a Service page, scroll down to the **Group Tools** list. Select **Collaboration (SharePoint) Team Site** → **NEW**.
4. On the Collaboration (SharePoint) Team Site page, there are two screens to complete. On the first screen, complete the field forms for **Person Requiring Service** and **Contact Information**. Click **Next**.
5. The second screen asks for a description of your SharePoint site. Complete the field forms and click **Submit**. The following highlights some of the components of this form:
 - a. **Site Title** – Since this will be what appears on the top of each page of your project's SharePoint site, it should clearly identify the project, such as naming it the Project Name.
 - b. **Primary and Secondary Owners** – These designates will have administrative privileges on the project's SharePoint site; i.e., they will be able to add and delete users, add document libraries, etc. The Project Manager should be assigned as the Primary Owner.
 - c. **File Types** – By specifying the File Types that will be stored on your project's SharePoint site, the SharePoint programmer will gain a sense of the use of the site and will be able to accommodate your needs. You do not have to indicate every file type that will be stored.
 - d. **Intended Use** – Select **IT Project Management**.

The IT Collaboration Team will notify you via e-mail when the site has been created.

Quick Reference Guide

Requesting an IT Project Team Site

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4.0 CUSTOMIZE YOUR PROJECT'S SHAREPOINT SITE AND USERS

Your project's initial SharePoint site will be designed specifically around the AMD IT Project Lifecycle. You will see folders corresponding to AMD IT Project Lifecycle Steps, templates, links to the Gate Tracking Log and Project Status Reports and other reference documentation.

This SharePoint "shell" site for projects using the AMD IT Project Lifecycle may be used as-is with very little customization. This site is built for customization, as long as you do not delete existing folders pertaining to the AMD IT Project Lifecycle.

The e-mail from the IT Collaboration Team will contain a hyperlink to your project's new SharePoint site. When you access the site, you will be able to make the appropriate configurations relevant to your project and Project Team.

How to Add Your Project Team

1. On your Project Team's SharePoint site home page, go to **Site Settings** → **Administration** → **Manage Users**.
2. Click **Add Users**.
3. Click **Address Book** and select the people you want to add as users to your project's SharePoint site.
4. Select the permissions you want to give those people – usually Reader or Contributor and click **Next**.
5. Verify the information is correct and click **Finish**.
6. Optionally, create groups to maintain tighter control over permissions. (See the SharePoint documentation on the MyWork Collaboration Portal home page <http://mywork/default.aspx> for more information.)

Quick Reference Guide

Setting Up the Project Repository

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5.0 CUSTOMIZE YOUR PROJECT'S APPROVAL WORKFLOW

When you receive your project's new SharePoint site, there will already be an established sample approval workflow serving as a placeholder and ready for your customization. This workflow confirms the key people involved in approving project deliverables. In order for people to be able to approve project deliverables, you will first need to modify the permissions of Contributors to the Project Deliverables document library to allow them to manage lists.

How to Enable Approvers

1. On your Project Team's SharePoint site home page under Documents in the Quick Launch menu, click **Project Deliverables**.
2. Under Actions in the left menu pane, click **Modify settings and columns**.
3. In the Customize Project Deliverables page under General Settings, click **Change permissions for this document library**.
4. In the Change Permissions: Project Deliverables page, select the **Contributor** check box.
5. Click **Edit Permissions of Selected User**.
6. In the Modify Permissions: Project Deliverables page, click **Advanced permissions**.
7. Select the **Manage Lists** check box and click **OK**.
8. Ensure the IT Manager and Project Sponsor are added to the SharePoint Site as Contributors by repeating the above steps as necessary.

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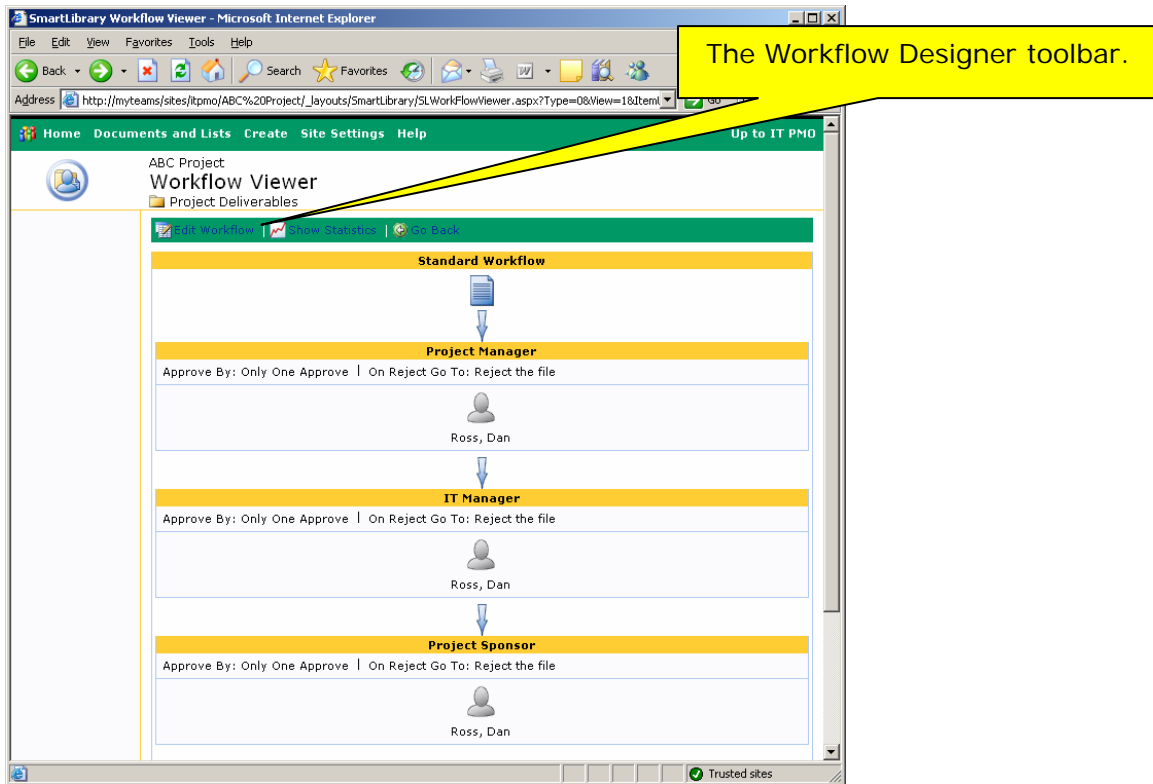
How to Customize the Approval Workflow

In order to view the Approval Workflow, you must be in the Project Deliverables view. Then, click **View Workflow** in the left menu pane under **Advanced Actions**. For your project, you will need to modify the sample workflow to assign contributors to the following roles:

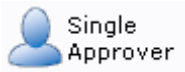
- Project Manager = 1st-level approver
- IT Manager = 2nd-level approver
- Project Sponsor = 3rd-level approver

1. On the Workflow Viewer page, click **Edit Workflow** in the Workflow Designer toolbar.

Note: The Administrator group listed as the approver at each workflow step is a placeholder. You must replace the placeholder approver with the individual approvers specific to your project.



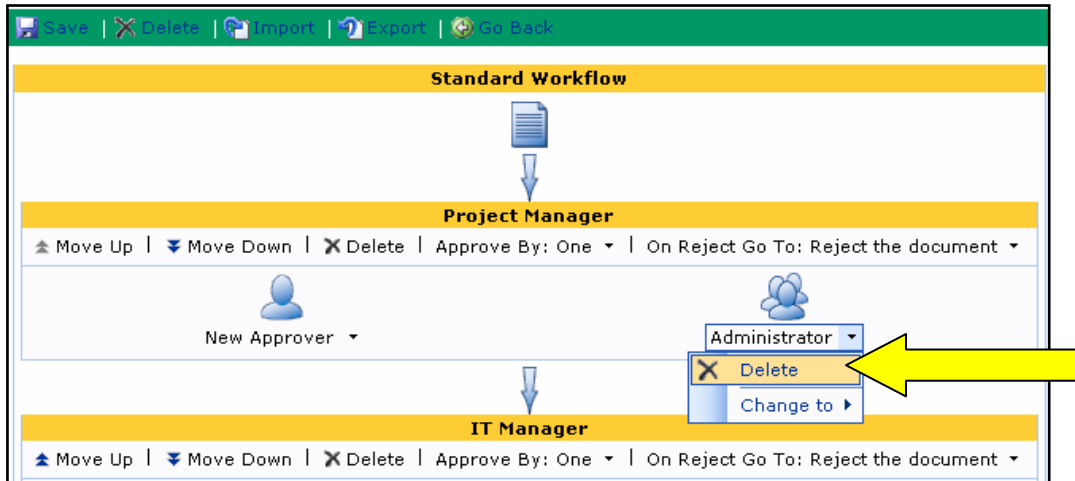
2. On the Workflow Designer page, drag and drop the **Single Approver** icon onto each workflow step.



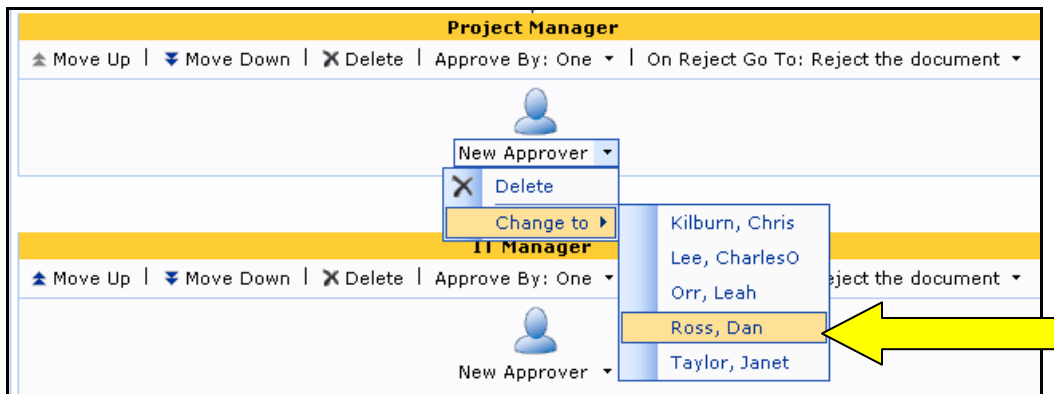
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3. For each Administrator Approvers Group icon (appearing automatically as an initial placeholder), select the drop-down menu under each group icon in the workflow and select **Delete**.



4. For each New Approver, select the drop-down menu under each icon in the workflow and select **Change to >**. Select the team member who will be the respective approver.



5. In the Workflow Designer toolbar, click **Save**.

Quick Reference Guide

Document Approval via SmartLibrary

AMD IT Project Lifecycle Training Outline

TRAINING SESSION DETAILS

AUSTIN TRAINING SESSIONS:

Location: Travis Oaks – Cottonwood

- a) October 18 – 9 am to 4:30 pm
- b) October 30 – 9 am to 4:30 pm

SUNNYVALE TRAINING SESSIONS:

Location: 1 AMD – Classroom C

- c) October 24 – 9 am to 4:30 pm
- d) October 25 – 8 am to 3:30 pm

* Remote training sessions to be scheduled for Dresden and Asia.

PROPOSED AGENDA

Time	Duration	Topic	Presenter	Location
9 - 9:30 AM	30 min.	Welcome/Introduction and Overview of the AMD IT Project Lifecycle	Senior Management (Clay or sub); Chris Kilburn	
9:30 - 10:15 AM	45 min.	The Four Steps of the AMD IT Project Lifecycle – Part I	Charles Lee	
10:15 - 10:30 AM	15 min.	Break	N/A	
10:30 - 11:15 AM	45 min.	The Four Steps of the AMD IT Project Lifecycle – Part II	Charles Lee	
11:15 AM - 12:00 PM	45 min.	AMD IT Project Lifecycle Templates – Part I		
12 - 1 PM	1 hr.	Lunch	N/A	
1 - 1:45 PM	45 min.	AMD IT Project Lifecycle Templates – Part II		
1:45 - 3 PM	1.25 hrs.	AMD IT Project Lifecycle Workflow (Step-by-Step) – Part I		
3 - 3:15 PM	15 min.	Break	N/A	
3:15 - 4 PM	45 min.	AMD IT Project Lifecycle Workflow (Step-by-Step) – Part II		
4 - 4:15 PM	15 min.	Resources		
4:15 - 4:30 PM	15 min.	Summary (Test and Survey)	Chris?	

Four Steps Overview – Total 1.5 hours

Templates – Total 1.5 hours

Workflow – Total 2 hours

TRAINING SESSION BREAKDOWN

Arrival

Upon arrival to the session, someone will be on hand at the door to oversee a sign-in sheet. Initial binders and handouts will be distributed to attendees as they arrive and sign-in. Initial handouts could include the detailed lifecycle diagram and empty or semi-empty (initial content TBD) binder.

Deliverable	Owner
Room set up	Heather (and Leah?)
Create and print agendas for each session – the who, what, when, where (4 total; 2 TBD)	Heather
Create sign-in sheet	Heather
Obtain binders	Heather
Have binder covers, spines and tabs printed	Heather
Arrange for binders in Sunnyvale	Heather
Signage (posters on easels?)	Heather
Table tents	Heather
Signage (banners?)	Heather

Welcome/Introduction and Overview of the AMD IT Project Lifecycle

KEY MESSAGES: Positive change for AMD and PMs; makes life easier; high-level view of lifecycle, its methodology and participants; senior/corporate buy-in

DURATION: 30 Minutes

Chris Kilburn should call the meeting to order and introduce Senior Management (SM) to the floor to speak. SM will deliver a brief presentation to introduce the lifecycle and explain why it's important for AMD to adopt as standard procedure. He should convey a positive message to facilitate change. After his presentation, he will turn over the floor to Chris.

Chris will provide a high-level view of the lifecycle, including the high-level lifecycle workflow. His presentation will reiterate the reasons for the new (and/or improved) standardized lifecycle, as noted in the Preface and Scope/Purpose sections in the Guidebook. He will introduce the members of the IT PMO and its role in the lifecycle. He will identify who has been involved in developing the lifecycle, including the IT governing bodies. He will discuss the methodology used to develop the new lifecycle and tie that back to how it relates to current processes. He will convey a positive message about how this will help the company and benefit each PM involved. He will briefly identify the topics that will be covered in the training, the objectives of training and what we expect the students to get from the glass. He will also identify the handouts and resources that will be distributed throughout the training session and at the end of the session. Be sure to thank people for attending and let them know the IT PMO is available to answer questions. He could possibly work in some interaction with the audience for discovery purposes to find out their current best practices and how they do things.

Deliverable	Owner	No. of Slides
Invite Senior Manager	Chris	N/A
Write talking points for SM	Chris	N/A
Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Chris	

The Four Steps of the AMD IT Project Lifecycle – Part I

KEY MESSAGES: Introduce and provide an overview of the Proposal Step and Planning Step; indicate how the new methodology relates to familiar methodology; illustrate how easy it is to get started and acclimate to the lifecycle by using the tools and templates available

DURATION: 45 Minutes

Chris will introduce Charles, who will spend 45 minutes providing a detailed overview of the Proposal Step and Planning Step of the lifecycle. Charles will explain the basic guidelines – there are four steps and four gates; the Exceptions Process; maybe explain some mapping to allow for attendees to relate the new concept to their current/familiar methods. Maybe we can include the table at the beginning of each section in the guidebook, where the purpose, input, output, etc. are listed. Graphics from the guidebook will be incorporated in the presentation. He will talk about the deliverables and their key points, such as the Project Proposal and setting up the site. He will indicate that we will learn more later and that all of this information will be provided for PMs on SharePoint. He will introduce the more detailed diagram of the lifecycle workflow. He will discuss the key participants in each step and go over approvals (maybe show his matrix). He will discuss the Gate Tracking Log and include screen shots in his presentation. He will go over Gates 0, 1 and 2. He will talk about the Project Management portion and status reports. Charles will invite them to the break and explain he will pick up on the rest of the lifecycle in Part II.

Deliverable	Owner	No. of Slides
Create handout for each step (Do we want a print-out of the matrix?)	Heather	
Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Charles	

---BREAK---

Deliverable	Owner
Room set up	Heather (and Leah?)
Order/arrange for break refreshments	Heather (and Leah – for Sunnyvale)

The Four Steps of the AMD IT Project Lifecycle – Part II

KEY MESSAGES: Introduce and provide an overview of the Execution Step and Implementation Step

DURATION: 45 Minutes

After the first break, Charles will continue discussion of the lifecycle and focus on the Execution Step and Implementation Step. Again, we can include the table at the beginning of each section in the guidebook, where the purpose, input, output, etc. are listed. Graphics from the guidebook will be incorporated in the presentation. He will talk about the deliverables and their key points, such as the Support Plan and project closeout. He will discuss the key participants in this step and go over approvals (maybe show his matrix). He will discuss the importance of continuous reporting and updating the Gate Tracking Log. He will go over Gate 3 and explain the CCB's involvement. He will talk about the Remedy Change Requests.

Deliverable	Owner	No. of Slides
Create handout for each step	Heather	
Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Charles	

AMD IT Project Lifecycle Templates – Part I

KEY MESSAGES: Identify the templates used throughout the lifecycle, where they are located and how they are accessed; the key points to remember for each template and the expectations for completing them; who completes the template and who approves

DURATION: 45 Minutes

During this portion of training, the PMP will discuss four of the seven templates that are accessible on SharePoint via the project's site. The Project Proposal Template and Project Financial Analysis Worksheet Template will be spoken of briefly (about 5-10 minutes total), since the PMs themselves do not generate these documents but should 1) know of their existence and creation and 2) understand their presence on the SharePoint site once it is created (or are these even going to be on the SharePoint site as templates?). The remainder of this portion of training could focus on the Project Charter Template and Project Management Plan Template (introduced in accordance with the Standard Project Management Processes Template). Approximately 15 minutes will be spent on discussion for each template, give or take some time contingent on the complexity of the template. Included in this discussion could be any necessary resources required or optional for the completion of these templates. Also instructions for downloading them. For display, do we want to generate a comprehensive PDF of the templates that can easily be scanned through on a big screen? We could highlight and point out with text boxes and arrows some of the key points of the template and save them in the PDF example. The PMP will announce lunch and inform the group of what will be presented after lunch.

Deliverable	Owner	No. of Slides
Create handout for each step	Heather	
Create PPT content for this portion of the training session (maybe a comprehensive PDF with call-out boxes? Short PPT could contain objectives and key points to remember)	Leah	

---LUNCH---

Deliverable	Owner
Room set up	Heather (and Leah?)
Order/arrange for lunch	Heather (and Leah – for Sunnyvale)

AMD IT Project Lifecycle Templates – Part II

KEY MESSAGES: Identify the templates used throughout the lifecycle, where they are located and how they are accessed; the key points to remember for each template and the expectations for completing them; who completes the template and who approves

DURATION: 45 Minutes

During this portion of training, the PMP will discuss the remaining three templates, which are the Requirements Specification Template, Project Implementation Plan Template and Project Closeout Report Template. Again, all of these will be accessible on the SharePoint site created for the project. Approximately 10-15 minutes will be spent on discussion for each template, give or take some time contingent on the complexity of the template. Included in this discussion could be any necessary resources required or optional for the completion of these templates.

Deliverable	Owner	No. of Slides
Create handout for each step	Heather	
Continuation of PPT/PDF content for this portion of the training session	Leah	

AMD IT Project Lifecycle Workflow (Step-by-Step) – Part I

KEY MESSAGES: Illustrate the lifecycle “in action” to promote familiarity of the new process; reiterate how the lifecycle is already very similar to the processes already in place and utilized by the attendees; ensure attendees gain an understanding of the highlighted areas of interest within the lifecycle steps and their relationship to one another and their impact on the final solution

DURATION: 75 Minutes

Dan will present this portion of the training session. Using a hypothetical project, he will walk through the lifecycle steps and gate, set up the Project Repository and dealing with the requirements, documentation, approvals, etc. along the way. Dan will take the attendees through the Proposal Step, the first part of which will be a brief explanation of the two deliverables and how a project is initially introduced to the company. This will begin a series of eight mini-lessons within the two-part topic. Approximately 10-15 minutes will be spent on discussion for each “lesson”, give or take some time contingent on the complexity of the lesson. The first three lessons – (1) Project Categorization, (2) Creating the Gate Tracking Log and (3) Setting Up the Project Repository – should be presented during the discussion of the Proposal Step. Dan will introduce the break and what follows.

Deliverable	Owner	No. of Slides
Create handout for each lesson	Heather	
Filler: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Dan	
Project Categorization: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Charles	
Creating the Gate Tracking Log: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Dan	
Setting Up the Project Repository: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Leah	

---BREAK---

Deliverable	Owner
Room set up	Heather (and Leah?)
Order/arrange for break refreshments	Heather (and Leah – for Sunnyvale)

AMD IT Project Lifecycle Workflow (Step-by-Step) – Part II

KEY MESSAGES: Illustrate the lifecycle “in action” to promote familiarity of the new process; reiterate how the lifecycle is already very similar to the processes already in place and utilized by the attendees; ensure attendees gain an understanding of the highlighted areas of interest within the lifecycle steps and their relationship to one another and their impact on the final solution

DURATION: 45 Minutes

Part I will begin discussion of (4) The Exceptions Process. This would be followed by four more lessons to explain the (5) Status Reports, (6) Document Approval Workflow and (7) SharePoint Risks/Issues List. After a wrap-up of the Planning Step, the group moves forward to the Execution Step, where again the process is detailed out in a fashion to cultivate a familiarity for the attendees. The last lesson would be to explain the (8) Quality and EA Compliance Review. Following this lesson, the group will learn about the Implementation Step and its requirements, expectations and participants.

Deliverable	Owner	No. of Slides
Create handout for each lesson	Heather	
Exceptions Process: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Charles	
Status Reports: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Charles	
Document Approval Workflow: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Dan	
SharePoint Risks/Issues List: Create PPT content for this portion of the training session (objectives, subject matter, key points to remember)	Dan	
Quality and EA Compliance Reviews: Create PPT content for this portion of the training session	Charles / Tanya to Approve	1

Resources

KEY MESSAGES: There are many resources available for the PM to use throughout the course of the project; the IT PMO has developed and set up these resources and tools to help ease the transition to the new lifecycle

DURATION: 15 Minutes

Leah will review the resources available to the PM, including but not limited to SharePoint training, lifecycle support folder, Lifecycle Guidebook, templates, contact names, etc.

Deliverable	Owner	No. of Slides
Create handout for the resources	Heather	
Create a list of the resources to distribute at this point in training	Leah	
Identify all the resources	Leah	
Post a link to the resources in an area on the Project Repository template	Leah	
Create PPT content to have on display during this portion of training (objectives, subject matter, key points to remember)	Leah	1

Summary (Test and Survey)

KEY MESSAGES: Thank attendees for participation; reiterate the benefits and user-friendliness of the lifecycle; ensure attendees have received all their handouts

DURATION: 15 Minutes

Chris could close the session and thank attendees for their participation. At the end of the training session, final handouts will be distributed (by other PMO staff) to complete their lifecycle training binder, including a hard copy of the guidebook, matrix, resource listing and any desk references (quick reference item). Chris could also administer the survey.

Deliverable	Owner	No. of Slides
Create final handouts (survey, appendices, guidebook, etc.)	Heather	
Create survey/test/evaluation form		
Create PPT content to have on display during this portion of training (objectives, subject matter, key points to remember)	Chris	

OTHER NOTES

- Each topic/section should have a beginning, middle and end; state objectives up front
- Go through each section in the guidebook to determine the who, what, when, where, why, how
- Mention transition period
- Create atmosphere where they have a say
- Overall checklist for entire lifecycle broken down by step – is this something useful?
- Merged presentations can follow the same color scheme as seen in the guidebook