

# RESEARCH PMO BROWN BAG LUNCH

WEDNESDAY, SEPTEMBER 16, 2020

“PROJECT MANAGEMENT CASE  
STUDY/WALKTHROUGH SESSION 1 OF 3” –  
INITIATE AND DESIGN

Anne E. Geary, MBA, PMP – Sr. Program Manager

Shareen Hinson, MBA, CSM - Sr. Project Manager

Margeya Patel, BS - Project Business Analyst

# AGENDA

- Housekeeping Items
- Introductions
- Case Study/Walkthrough Approach
- Project Phases and Phase Deliverables
- Project Deliverable, Overview and Approach
- Project Initiation Phase
  - Standard Project Documentation
- Project Design Phase
- Research PMO Tools and Resources
- Questions/Survey

# HOUSEKEEPING

- How to approach the material
- Interactive training and opportunities with virtual education
  - Indicate you have a Question in Chat
  - Ask a Question through Raise Hand
- Survey information

# INTRODUCTIONS

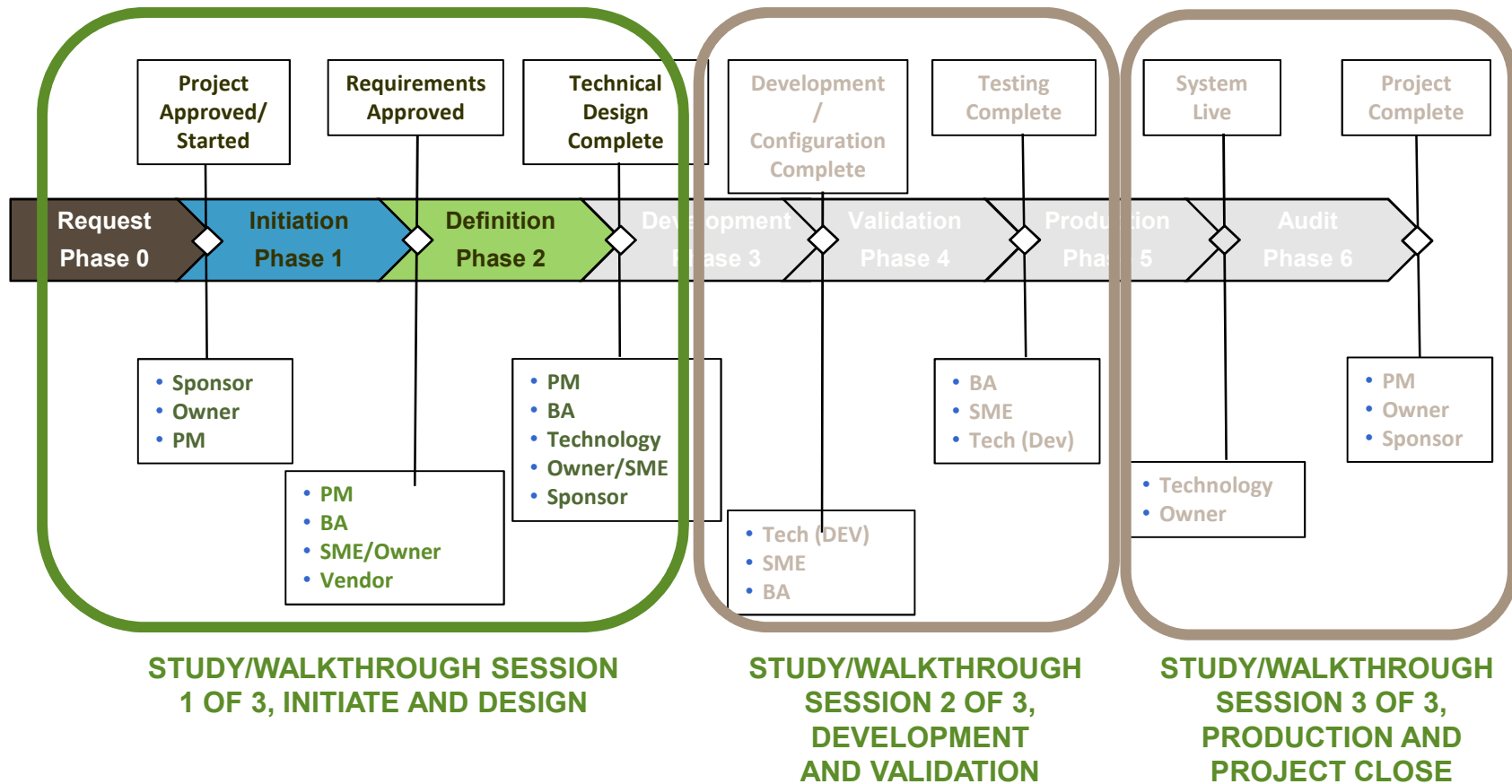
- PMO
  - Team intros; Margeya, Shareen, and Anne
- Participants
  - Name, Functional Team
  - Your experience working on a project team and any specific issues or questions that you encounter while working on a project
  - Why you signed up for this event, what you hope to learn?

# CASE STUDY / WALKTHROUGH APPROACH

During each session, the Research PMO will take a combined approach of evaluating this project, as would be done in a Case Study. We will use a detailed examination to show what worked well, why and identify opportunities for improvement for this particular case. At other times, we will use the project to show generic examples that can be applied across all types of projects.

# CASE STUDY / PROJECT PHASE OVERVIEW

## Key Phase Deliverables & Resource Expectations



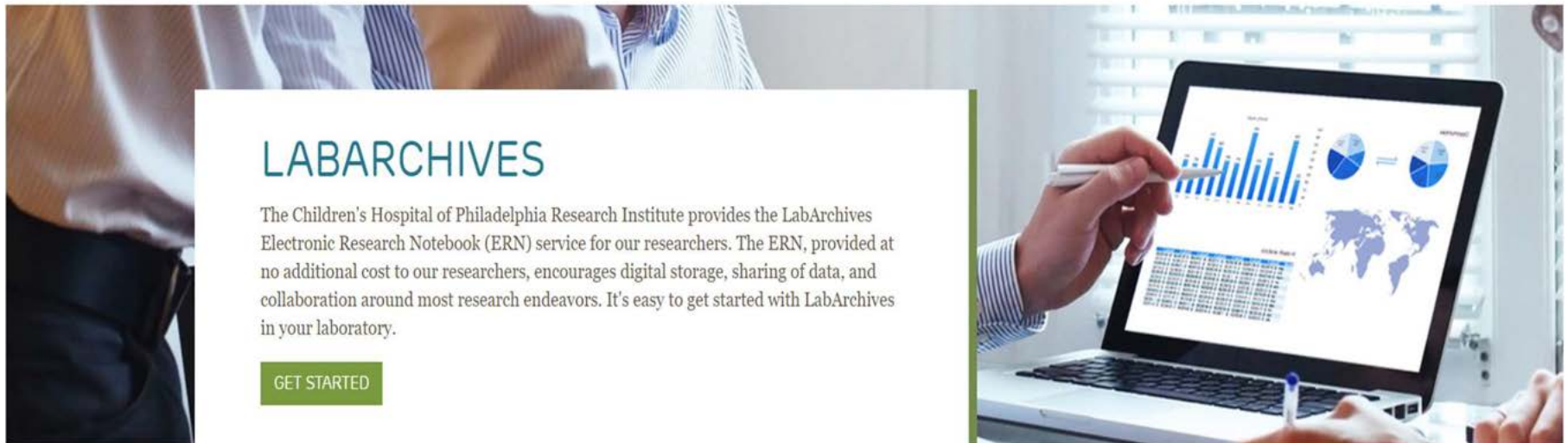
# PROJECT DELIVERABLE



LabArchives Electronic Lab Notebooks

 SIGN IN

[GETTING STARTED](#)   [HELP & SUPPORT](#)   [DATA CONSIDERATIONS](#)   [CONTACT US](#)



## LABARCHIVES

The Children's Hospital of Philadelphia Research Institute provides the LabArchives Electronic Research Notebook (ERN) service for our researchers. The ERN, provided at no additional cost to our researchers, encourages digital storage, sharing of data, and collaboration around most research endeavors. It's easy to get started with LabArchives in your laboratory.

[GET STARTED](#)

<https://labarchives.research.chop.edu/>

# LAB ARCHIVES PROJECT OVERVIEW AND APPROACH

- Within the CHOP Research Institute, a need was identified to enable our investigators access to a collaborative tool that is specifically designed for the storage, organization, sharing, collaboration, and publishing of scientific research.
- Penn Hospital and University is currently utilizing Lab Archives, a cloud based, highly secure solution that provides a simple tool to be used by the institution's investigators to manage their data and to protect the intellectual property rights of the institution.
- The RIS department will perform an evaluation of the Lab Archives tool to confirm that our investigators at CHOPs Research Institute can utilize this same tool. If so, a detailed project plan will be developed to support an early adopters program and eventually, a full implementation.



# LAB ARCHIVES PROJECT ROLES

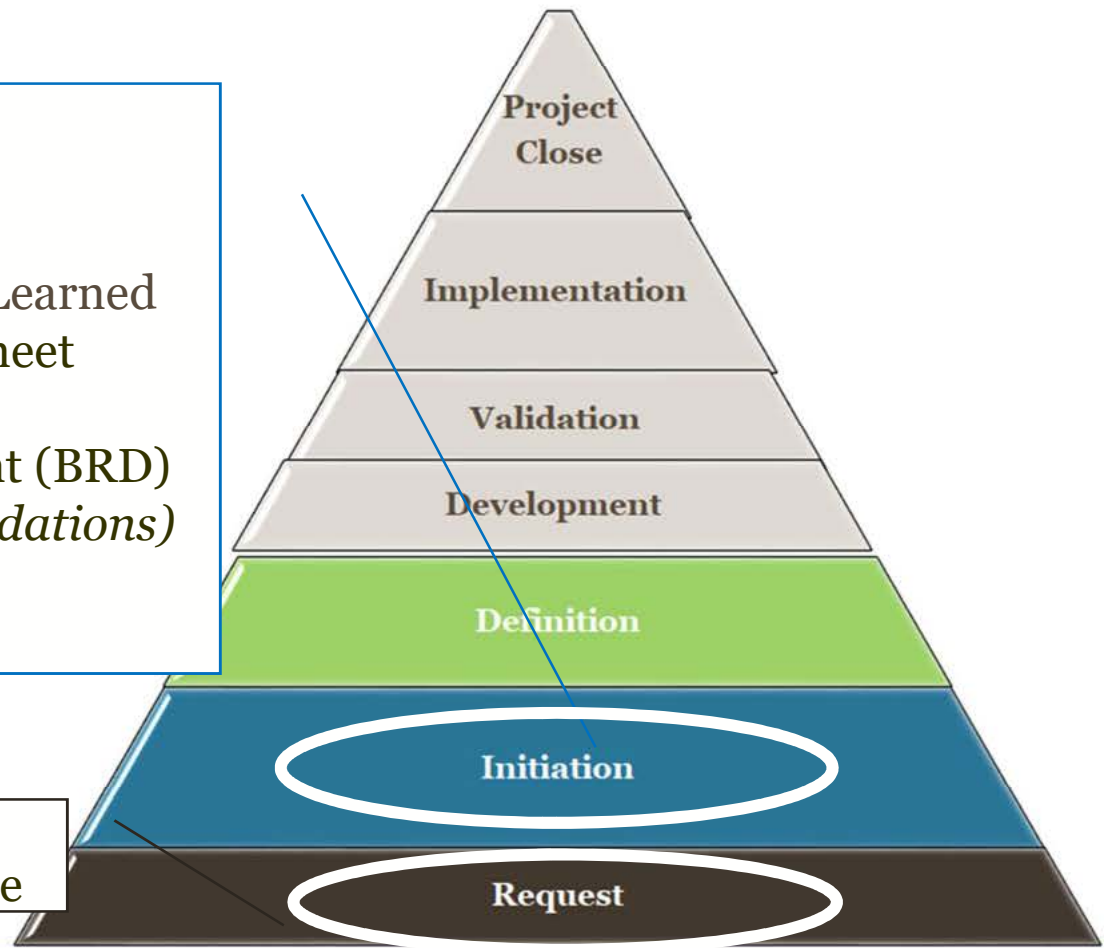
- CHOP Resources
  - Executive Sponsors
  - Project Manager
  - Business Analyst
  - Project Owner
  - Research Information Systems Manager
  - Research Application Technical Resources
  - Enterprise Technical Resources
  - Research Web Resources
  - Supply Chain Resource
- Lab Archive Resources
  - Lab Archive Rep
  - Lab Archives PM
  - Lab Archives Technical Resources

# PROJECT INITIATION PHASE 1

# PROJECT INITIATION PHASE

Project Charter  
Assign Resources  
Project Plan  
Evaluate prior projects Lessons Learned  
Financial Assessment Worksheet  
(Contracting)  
Business Requirements Document (BRD)  
(Requirements & peer recommendations)  
Risk & Communications  
Project Dashboard

Formal Request  
Initial Hours Estimate



# PROJECT CHARTER / COMMUNICATIONS PLAN

During the initiation phase the Project Charter is drafted and approved by the Executive Sponsor/Project Owner. This document details all in-scope/out-of-scope activities, project timeline, project team members, and any identified risks and constraints.

The Communication Plan, primarily used by the project manager, details what level of communication is needed for each stakeholder, the frequency of the communication, and the objective of the communication.

Responsible Name	Stakeholders	Objectives	Requirements	Tactics	Timing / Frequency	Responsibility
Anne Geary	Project / Process Sponsor	Awareness of project status/timing	Deliver project status	Project Dashboard Project Status Steering Committee Meeting	Ad Hoc Monthly Weekly	Project Leader
Shareen Hinson	Project Team	Awareness of project status/timing	Updates to project plan (if applicable), project status, task status	Project Team Meetings	Weekly	Project Leader
Margeya Patel	External Vendors	Awareness of project status/timing	Vendor Demo's	Vendor/Project Team Meetings	Ad Hoc	Business Analyst

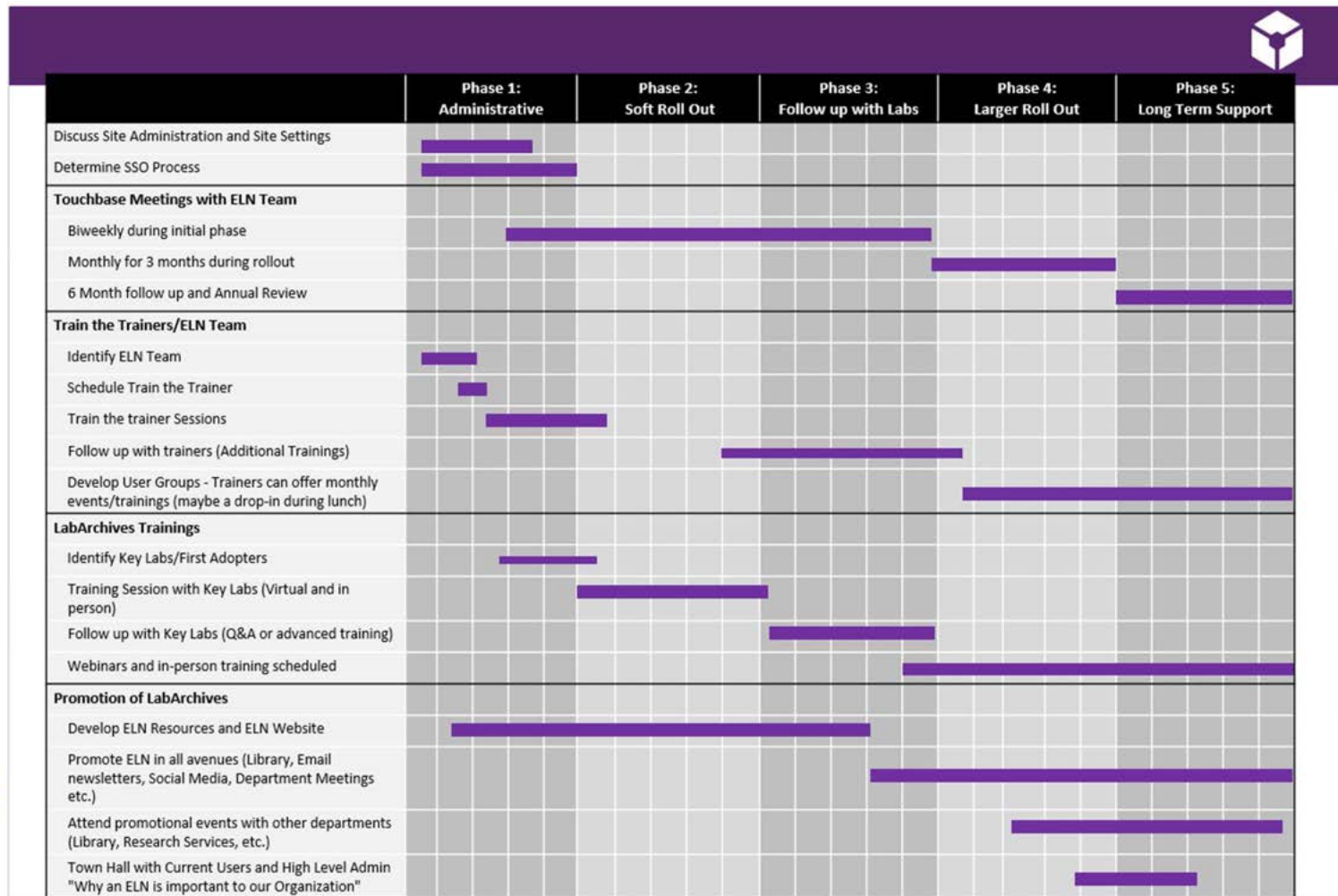
# RISK AND ISSUE TRACKER

- Enabling Single Sign On with Lab Archives became a High Priority Issue during the project. This was caused by the type of technology that Lab Archives was using and how it integrated with CHOPs technology.

Issue	Details	Added	Status	RYG	Assig
<b>High Priority - 1</b>					
SSO Testing & Lab Archives Access to Test Account	1 -Need to provide access to Developer 2 -Review technical solution with CHOP and receive approval 3 - Confirm testing activity	07/14/20	Open	●	
<b>Medium Priority - 2</b>					
Penn Faculty with CHOP ID	1- ID list of CHOP Users who are Penn Faculty 2- Shift those users to CHOPS account 3- Confirm process with new users	07/14/20	Open	●	
Policy Changes & Implementations	1- Ensure all appropriate policies and SOP's are created/updated for the use of Lab Archives 2- Communicate to users	07/14/20	Open	●	

# PROJECT PLAN: VENDOR IMPLEMENTATION SCHEDULE

- Often a high-level schedule detailing the vendors plans for the project implementation. This should be reviewed and compared to the internal project plan to ensure alignment.





# INITIAL DRAFT PROJECT PLAN

Copy of Lab Archives Project Plan

WBS	Task Name	Predecessors	Duration	Actual Start Date	Actual End Date	% Complete	Work	Project Role Assigned	Status
0	Project Request		1.042d	10/08/18	10/09/18	100%	33.6h		Complete
0.1	Project Start		1d	10/08/18	10/08/18	100%	0.5h	Project Owner	Complete
0.2	Project Manager Assigned		1.042d	10/08/18	10/09/18	100%	0.5h	Project Owner	Complete
0.3	Prepare for Kickoff		1.042d	10/08/18	10/09/18	100%	0.5h	Project Owner	Complete
1	Phase 1 - Project Initiation		118.917d	10/11/18	03/29/19	100%	217.6110312		In Progress
1.1	Project Management Activity		107d	10/11/18	03/14/19	100%	33.6h		
1.2	Resourcing		53.333d	11/30/18	02/18/19	100%	9.0h		Complete
1.3	Contracting		74.333d	11/08/18	02/25/19	100%	16.0h		Complete
1.4	CHOP RI Requirements (Functional system use / website tool / impacts between Penn and CHOP / document storage / security)		90.917d	11/15/18	03/26/19	100%	119.0110312		Complete
1.5	LabArchives Requirements (following contract execution)		40.409d	01/10/19	03/08/19	100%	34.0h		Complete
1.6	Project Control		3d	03/26/19	03/29/19	100%	6.0h		Complete
2	Phase 2 - Design/Definition Phase		94.284d	01/10/19	05/23/19	100%	201.45h		Complete
2.1	Design		94.284d	01/10/19	05/23/19	100%	189.45h		Complete
2.2	Project Planning, Training and Communications		4d	05/01/19	05/07/19	100%	8.4h		Complete
3	Phase 3 - Development/Configuration/Test Planning		60.5d	04/25/19	07/23/19	0%	70.40086467		Not Started
4	Phase 4 - Validation (Training and Webinar Planning)		84.374d	04/09/19	08/07/19	0%	231.0h		Not Started
5	Phase 5 - Production (Roll Out & Webinars)		73.125d	04/29/19	08/12/19	0%	145.6h		Not Started
6	Phase 6 - Audit - TBD		7d	08/13/19	08/21/19	0%	0.0h		Not Started

# BUSINESS ASSOCIATE AGREEMENT

## MASTER BUSINESS ASSOCIATE AGREEMENT

This Master Business Associate Agreement ("Agreement"),  
is entered into on 11 February 2019 ("Effective Date"), between

Business Associate Name: LabArchives, LLC

Address: 1915 Aston Avenue

Address: Carlsbad

Address: CA 92008

(and, if any, its parent corporation, and affiliates and subsidiaries under common ownership or control, collectively called "Business Associate") and The Children's Hospital of Philadelphia (and its affiliates and subsidiaries constituting an Affiliated Covered Entity), 3401 Civic Center Blvd., Philadelphia, PA, 19104 ("CHOP").

## WITNESSETH:

WHEREAS, CHOP wishes to allow the Business Associate to have access to Protected Health Information ("PHI") and including Electronic Protected Health Information ("EPHI") referred to hereafter as PHI that is either provided to the Business Associate by CHOP, or received, viewed, maintained, transmitted or created by the Business Associate on behalf of CHOP in the course of performing Services to, for or on behalf of CHOP;



# SERVICE LEVEL AGREEMENT



**labarchives**  
Research Notebook

[www.labarchives.com](http://www.labarchives.com)

[www.esciencenotebook.com](http://www.esciencenotebook.com)

## LabArchives Service Level Agreement

This Agreement covers the provision and support of the LabArchives ("LabArchives") hosted Professional Edition and/or Classroom Edition for Children's Hospital of Philadelphia ("Customer"). LabArchives, provides the computer hardware and software access to the LabArchives Platform. This Agreement remains as valid until revised, and will be reviewed annually, with further reviews in the case of a breach of this Agreement.

### 1 Service Description

The LabArchives Service consists of the hardware, software, and supporting infrastructure for management of laboratory data and classroom laboratory science instruction. LabArchives also provides support and training for Customers as part of the Service. The point of contact will be [support@labarchives.com](mailto:support@labarchives.com), telephone +1-760-579-0342; (Australia +61 2 8004 9069).

### 2 Definitions

**Customer** includes the "Customer" and its Authorized Users and Customer Administrators.

**Authorized Users** means Customer's professional researchers, faculty, staff and students.

**Business Hour(s)** means a 60 minute hour during the time period: 8:30 AM – 9:00 PM EST or EDT, 5:30 AM– 6 PM PST or PDT; 8:30 AM – 5 PM AET; 12:30 PM through 2 AM GMT or BST.

**Customer Data** means any Customer data or information Customer creates, obtains, accesses (via records, systems, or otherwise), transmits, stores in LabArchives. And any information LabArchives receives from Customer in the course of LabArchives performance of the Service.

# TERMS-OF-USE AGREEMENT



**labarchives**  
Research Notebook

[www.labarchives.com](http://www.labarchives.com)

[www.esciencenotebook.com](http://www.esciencenotebook.com)

## Terms-of-Use Agreement

This Enterprise Subscription Agreement (“Agreement”) is entered into by and between LabArchives LLC (“LabArchives” or “Service Provider”), with a place of business at 1915 Aston Avenue, Carlsbad, CA 92008, and “The Children’s Hospital of Philadelphia Research Institute” (“Customer” or “CHOP”), located at 3401 Civic Center Blvd, Philadelphia, PA 19104.

WHEREAS, LabArchives has developed and owns a service for the online management of laboratory data (the “Service”); and

WHEREAS, Customer wants to license the Service, and LabArchives is willing to grant this license of the Service to Customer.

NOW, THEREFORE, for good and valuable consideration, the parties agree as follows:

- 1. Grant of License.** LabArchives hereby grants to Customer a non-exclusive, non-transferable license to use the Service in accordance with the terms and conditions set forth herein. This license extends to Customer’s faculty, staff and students (“Authorized Users”), to a maximum number of unlimited Authorized Users. Customer and its Authorized Users may use the Service for the online management of laboratory data, including creating and editing content, sharing content, collaborating with others (both within and outside Customer’s institution) and publishing or otherwise sharing results. The Service may be networked throughout Customer’s geographic location and may also be made available remotely through secure access procedures that Customer establishes.

# BUSINESS REQUIREMENTS GATHERING – INTERNAL LAB REQUIREMENTS

Business Requirements Gathering  
Lab Archives Electronic Research Notebook  
The Children’s Hospital of Philadelphia Research Institute  
November 2018

Functional Requirements, Policies, Procedures

Describe today’s research note taking process. Consider the aspects of organization, documentation, storage, protection, sharing, and collaborating.

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How much does your team presently spend on its annotation processes?

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Please describe a particularly efficient facet of your current process. An inefficient one.

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How do your teams monitor and exchange research notes?

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What are your approaches to external collaboration?

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# THIRD PARTY REFERENCE MATERIAL

<i>Vendor Name</i>	<b>Lab Archives</b>
<i>Software being evaluated</i>	<b>ERN</b>
<i>Customer Reference Company</i>	<b>Cornell</b>
<i>Customer Reference Representative(s)</i>	<b>Wendy, Todd and Ben</b>
<i>Date</i>	<b>12/19/18</b>

<b>Background</b>	
Describe your business and how you operate	They are primarily a university that has research
When and why did you decide to look for the software	Researchers asked for a solution
What other vendor systems did you consider when making this decision	Looked at 25- 30 labs and used trial subscriptions to three vendors
When did you contract with selected vendor?	Did 6 month pilot with LabArchives – 1/2013 – 6/2013 overwhelmingly positive
How long has the product been in production?	2013- implemented researchers and classrooms
How is your company using the product?	Library services has help tremendously
How many end-users? What is the geographic scope of the end-user base?	800 active users/2,000 accounts

# FUNCTIONAL REQUIREMENTS

Lab Archives ERN				Project ID	Lab Archives Implementation	Release Versi
Requirement ID	Critical/Must Have = 3 Want to Have = 2 Nice to Have = 1	Requirement Deliverable (Yes/No)	Requirement Description	Status	Requirement Type: Core Feature, Functional, Compliance, Integration, Deployment, Feature Request	Requirement Enable
R001	3	Yes	Enable CHOP SSO / Redirect	In Progress	Integration	CHOP IDM AD integr
R002	2	Yes	Enable integration with a Research managed Web Portal	In Progress	Integration	
R003	3	Yes	Large file uploads accommodated	In Progress	Integration	Box integration allows
R004	2	Yes*	Mobile devices feature parity with desktop version	Review LA KB	Core Feature	Not 100% feature par
R005	3	Yes	Lab Notebooks available to collaborators	Governance decision	Core Feature	Subject to CHOP polic
R006	2	Yes	Ability to load existing physical documents	Delivered	Core Feature	Researcher DIY
R007	1	Yes*	DOI linking and referencing of articles Site Setting enabled	Governance decision	Functional	*CHOP Policy may lin
R008	3	Yes	Notebooks are easily searchable in real-time	Delivered	Core Feature	<a href="https://labarchives.k">https://labarchives.k</a>
R009	1	Yes	Voice to text translation feature available	Delivered	Functional	Device and third party
R010	1	No	OCR text conversion feature available	Done	Functional	Lab Arc consult
R011	2	Yes	Ability to edit MS Office content in-line without opening multiple tabs and new windows	Delivered	Core Feature	Office 365
R012	3	Yes	99.9%+ uptime for notebook access	Delivered	Core Feature	Lab Arc SLA
R013	1	Yes	Ability to capture hand drawn sketches using desktop or mobile app	Delivered	Core Feature	Native to LA
R014	1	No	Page-level template management within lab notebooks	Review LA KB	Core Feature	
R015	1	No	Is System Integration with EPIC possible?	Governance decision	Compliance	
R016	1	Yes	Investigator annotation of already locked or shared content	Delivered	Core Feature	Via comments feature
R017	3	Yes	CHOP devices meet product's OS and Browser requirements	Delivered	Core Feature	Lab Arc consult, RIS I
R018	2	No	Notebooks may act as a document repository for IRB consents.	Governance decision	Compliance	Not an intended use c
R019	3	Yes	Notebooks can be easily copied and have ownership reassigned	Governance decision	Core Feature	<a href="https://labarchives.k">https://labarchives.k</a>
R020	1	Yes	Ability to apply DLP (Data Loss Prevention) policy enforcement of IP agreements	Follow up	Feature Request	Policy and governanc
R021	3	Yes	Ability for a user to recover inadvertently deleted data	Task	Core Feature	<a href="https://labarchives.k">https://labarchives.k</a>
R022	2	Yes	Ability to capture lab instrument metadata	Delivered	Functional	Device dependant.
R023	3	Yes	Ability to sign and lock select pages	Delivered	Functional	<a href="https://labarchives.k">https://labarchives.k</a>
R024	3	Yes	Service includes end user support via phone and knowledgebase	Delivered	Core Feature	<a href="https://www.labarchi">https://www.labarchi</a>
R025	3	Yes	Hashtag tagging of notebook pages available	Delivered	Core Feature	As Delivered
R026	3	Yes	Owner can secure select notebook content from alteration	Delivered	Core Feature	
R027	2	Yes	Are there affordances for the sequestering of notebooks to secure compliance	Delivered	Process	Call to LA Support by
R028	3	Yes	LA Data retention policies meet CHOP requirements	Review with LA	Functional	Lab Arc consultation,
R029	2	Yes	CHOP's LA site shows custom CHOP branding	In Progress	Integration	Logo uploaded to a sf
R030						
R031						
R032						
R033						



# STATUS AND GATE REPORTING EXAMPLES

- Status reports provide stakeholders a quick snapshot of the project progress, identified risks and/or issues
- Status reports are usually distributed by the PM on a weekly basis or a Smartsheet Project Dashboard may be shared to provide the project status

Weekly Status				Project Manager	Anne E. Geary		Updated on : 01/04/2019
LabArchives Implementation				Project Overview	Within the CHOP Research Institute, a need was identified to enable our investigators access to a collaborative tool that UPenn currently uses and is specifically designed for the storage, organization, sharing collaboration, and publishing of scientific research. The RIS department will perform an evaluation of the LabArchives tool to confirm our investigators at CHOPs Research Institute can utilize this tool and develop a project plan for implementation.		
Milestones				X			
Schedule	Status, % Complete	Planned	Actual/ Revised				
1 - Initiation	43%	02/20/19					
2 - Definition	0%	03/05/19					
3 - Build (Pilot)	0%	04/01/19					
4 - Test/Validation	0%	TBD					
Go-Live (Full Implementation)	0%	TBD					
5 - Production	0%	TBD					
6 - Audit	0%	TBD					
Risks & Issues (New) <small>complete list is available...</small>				X			
Issues				• XXX			
Risks				• XXX			
Key Updates							
				<b>Current Phase Accomplishments (To-Date/Since last update)</b> ✓ Draft Charter and Draft Project Plan initiated ✓ Requirements gathering process started – 11/26 through 1/11 ✓ Project owner, Kristina Harr, confirmed - 1/3 ✓ Redline draft received from LabArchives on 12/20 ✓ Reference calls complete; Penn, Jefferson, Cornell, Pitt and Partners – 12/20			
				<b>Next Steps/Actions (with Dates)</b> • Schedule and execute BAA review between LabArchives and supply chain - week of 1/7 • Continue requirements gathering through 1/11 (may be extended) • Confirm additional project resources (technical, functional and vendor), steering committee members and meeting schedules – 1/18 • Schedule project review and discuss next steps with Kristina Harr – TBD • Begin work on risk and communications plan – AEG 1/11			
				<b>Planned Meetings</b> • Requirements review – TBD • Team Meeting - TBD			
Forecast & Actual Hours				X			
				Total Forecast Hours: Total Actual Hours (+current week):			
				Total Forecast Dollars: Total Actual Dollars (+current month):			
				Comments:			

Milestones from Project Plan

New Risks/Issues Identified

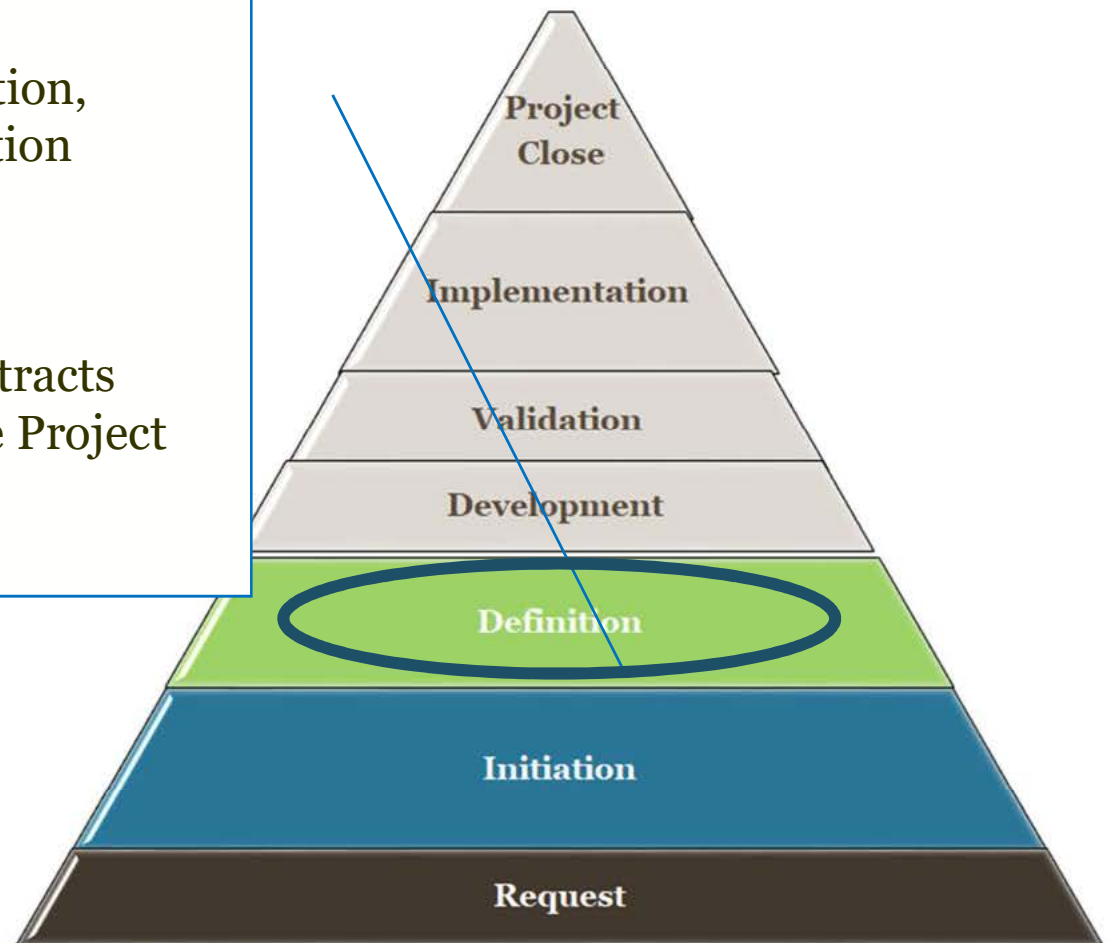
Key Updates

Next Steps

# PROJECT DEFINITION PHASE 2

# PROJECT DEFINITION PHASE

**DEFINITION:**  
System Design; Configuration,  
Development and Integration  
Test Strategy  
Final Project Plan  
Final Budget  
Finalizing Outstanding Contracts  
Governance Approval to Move Project  
forward





# EARLY ADOPTER PROGRAM PARTICIPANTS

- Research teams that were included in requirements phase
- Researchers that were using other ELN platforms
- Researchers/teams that requested access to an ELN

# APPLICATION TECHNICAL SPECIFICATIONS



## Technology Stack Overview

### Frontend Cloud Services from Amazon Web Services (AWS) and Others

AWS Elastic Load Balancers manage traffic, server health and allowed traffic  
AWS Security Groups manage allowed traffic and IP-restricted services  
AWS Identity & Access Management and Key Pairs limit admin access to AWS resources  
Google Authenticator provides Multi-Factor Authentication to further secure admin access  
Pingdom provides secondary monitoring, notifications and stats from global locations

### Frontend Application Technologies (Browser Level)

(HTML, CSS, JavaScript provided over HTTPS)  
Application logins are proprietary or via Institution's Shibboleth authentication

### Backend Application Technologies (Application Development Level)

(Ruby, Ruby on Rails, Support Utilities)

### Server Operating System and Supporting Services

(Ubuntu, CentOS, LUKS, NFS, NGINX/Passenger or Apache, Monit)

### Infrastructure Backend Cloud Services from Amazon Web Services

Elastic Computing Instances provide the servers  
Elastic Block Storage provides the notebook data storage  
S3 provides additional storage for logs and large notebook files  
RDS provides the MySQL database for account, sharing and global settings.  
Cloudwatch provides monitoring, notifications and stats

# LAB ARCHIVES SHIBBOLETH

\***Shibboleth** is a single sign-on log-in system for computer networks and the Internet. It allows people to sign in using just one identity to various systems run by federations of different organizations or institutions. The federations are often universities or public service organizations.

Children's Hospital of Philadelphia

FIND A DOCTOR DEPARTMENTS CONDITIONS LOCATIONS YOUR VISIT

## LabArchives

Login

labarchives  
Institutional Authentication (Shibboleth)

### Children's Hospital of Philadelphia Login Setup

You will need to associate your LabArchives account with your institution's login credentials. You can specify your LabArchives account below by either creating a new LabArchives account or specifying an existing one. Then, the next time you login to LabArchives through your institution's login site, you will be taken directly to your LabArchives account.

**STUDENTS:** If you received an email informing you that a LabArchives course notebook has been created for you and that you have to activate your account, choose the option "I do not have a LabArchives account and need to create or activate one."

If an email address is already entered in the form below, verify that it is the address at which you received the "activate" email, and correct if necessary, before proceeding.

[I have an existing LabArchives account already.](#)

[I do not have a LabArchives account and need to create or activate one.](#)

Log In

mynotebook.labarchives.com

Search Notebook

powered by labarchives

Drop files here or create something new

Children's Hospital of Philadelphia  
RESEARCH INSTITUTE

27

\* Reference Shibboleth Single Sign-on architecture, wikipedia, 2020

# LAB ARCHIVES BOX INTEGRATION



www.labarchives.com

www.esncienenotebook.com

## Implementing LabArchives® at your Institution

Congratulations--you are leading the charge in innovation when it comes to providing your researchers with the latest tool to support research data management and collaboration in a secure and flexible environment.

This overview document will walk through the steps and options available to your institution as we work with you to deploy LabArchives to your users. The steps below cover the *typical* milestones or decision points in the deployment process. Our goal is to provide suggestions of best practices, and to work with you define the process that will be most effective for your team and users.

Step 1: Determine who will be part of your ELN team and point of contact

The team that oversees the deployment of LabArchives usually includes members from these groups:

IT

Academic Technology

Librarian (Research, Information, Subject Discipline, or Data Repository)

Research Office

Researcher

- Identify who will be on the team
- Contact information for team members
- Who will be the primary point(s) of contact

Step 2: Single Sign-on Access

If your institution has enabled Shibboleth (Single Sign-On) access to web services, we can set this up for your institution. Please see the Shibboleth Overview document for more information. In



# INTERNAL CHOP RIS WEBSITE DESIGN

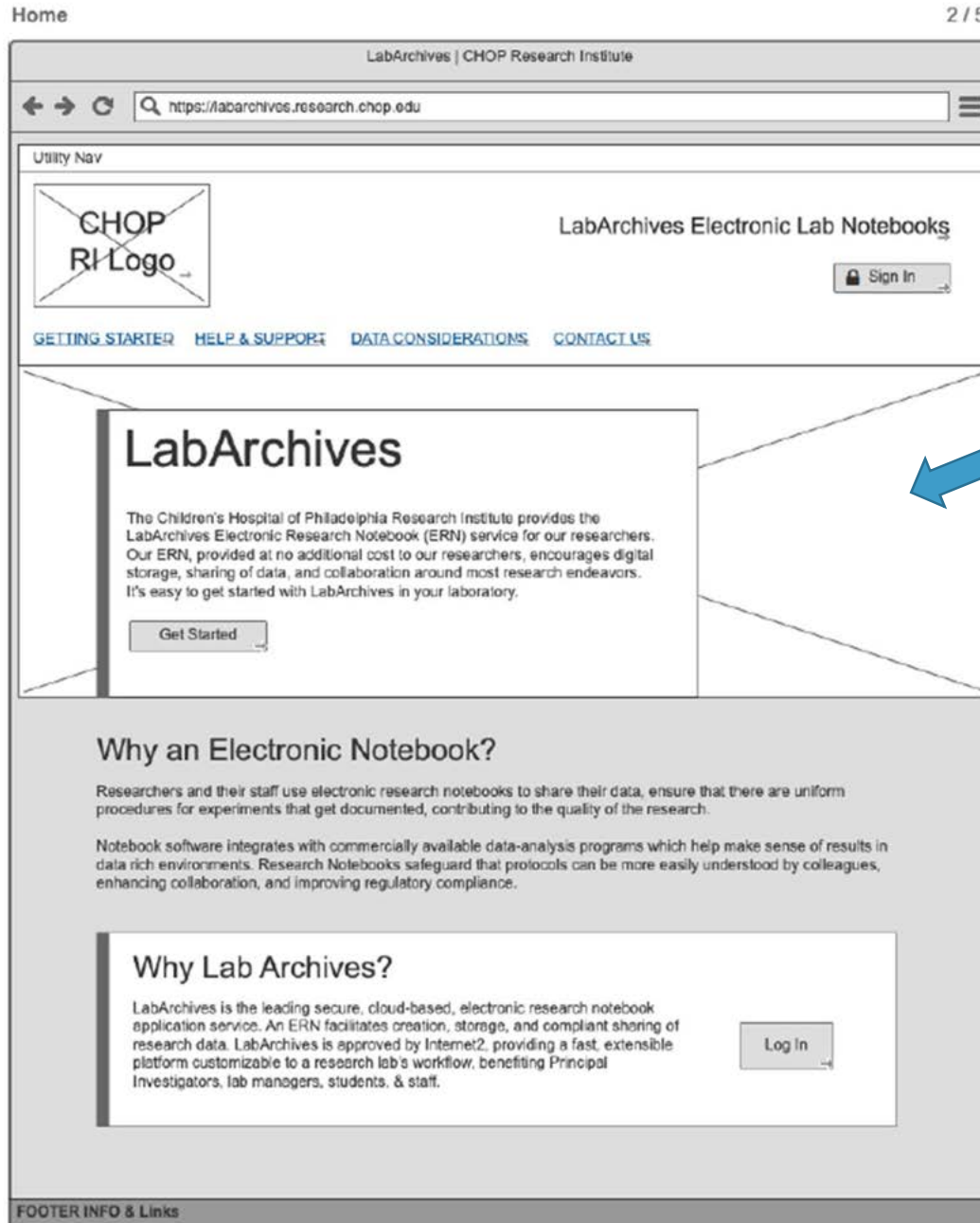
A different approach to project management is the Agile Methodology which takes an iterative approach to releasing system functionality



**Sprint 1 Deliverables**  
• **Functional Design**

**Sprint 2 Deliverables**  
• **Technical Design**

# CHOP LAB ARCHIVES WEB PORTAL DESIGN



Similar to an architectural blueprint, a wireframe is a skeletal outline of a webpage or app

# TEST STRATEGY



## CHOPRI Lab Archives Implementation: Test Strategy

**\*\* DRAFT \*\***

The introduction of LabArchives Electronic Research Notebook Software at the CHOP Research Institute aims to provide researchers with the tools to gather and collaborate researcher data digitally. LabArchives is presently the market's leading ERN/ELN software service. RIS and Research Administration will form a LabArchives Administration team responsible for testing and associated communications with the vendor and the research community. Testing strategy, cases, and outcomes will be collected with the project documentation.

### Scope

Product/service testing scope shall encompass verifying 1) product core functionality, 2) a successful integration between LabArchives and identified requisite CHOP IS systems, and 3) the satisfaction of researcher and administrative requirements for an ERN/ELN system.

### Participation

Research Information Services (RIS), a vendor representative, and a group of Early Adopter Researchers (EAR) will participate in testing product core functionality. Systems integration operability will be configured and verified by RIS and any CHOP or LabArchives IS teams involved in that integration, then further verified by the EAR. An ERN/ELN governance committee at CHOP will be consulted in parallel to ensure that the product in fact aligns with CHOPRI's regulatory and compliance needs.

# PROJECT TRAINING STRATEGY

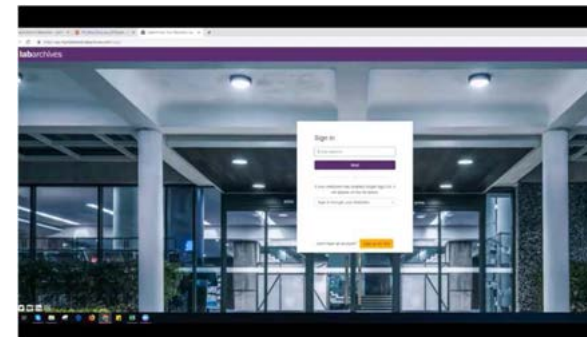
During the definition phase of the Lab Archives project, the training approach was determined to start with a select group of identified users. Additional user training was made available after the project launch.

Quick  
Reference  
Guides

- Supports getting users acclimated to the platform quickly

Technology  
Based  
Training

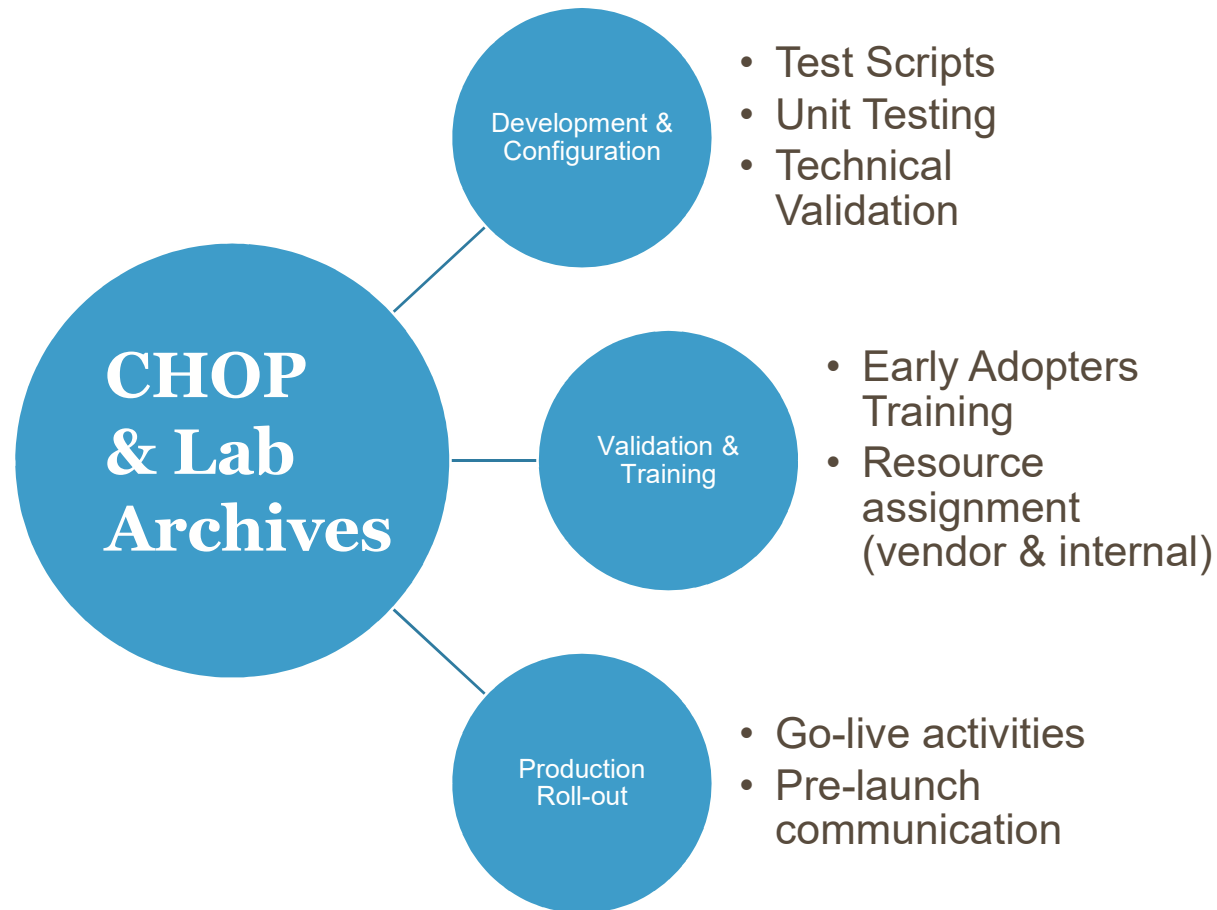
- Leverage technology for users self-serve training needs





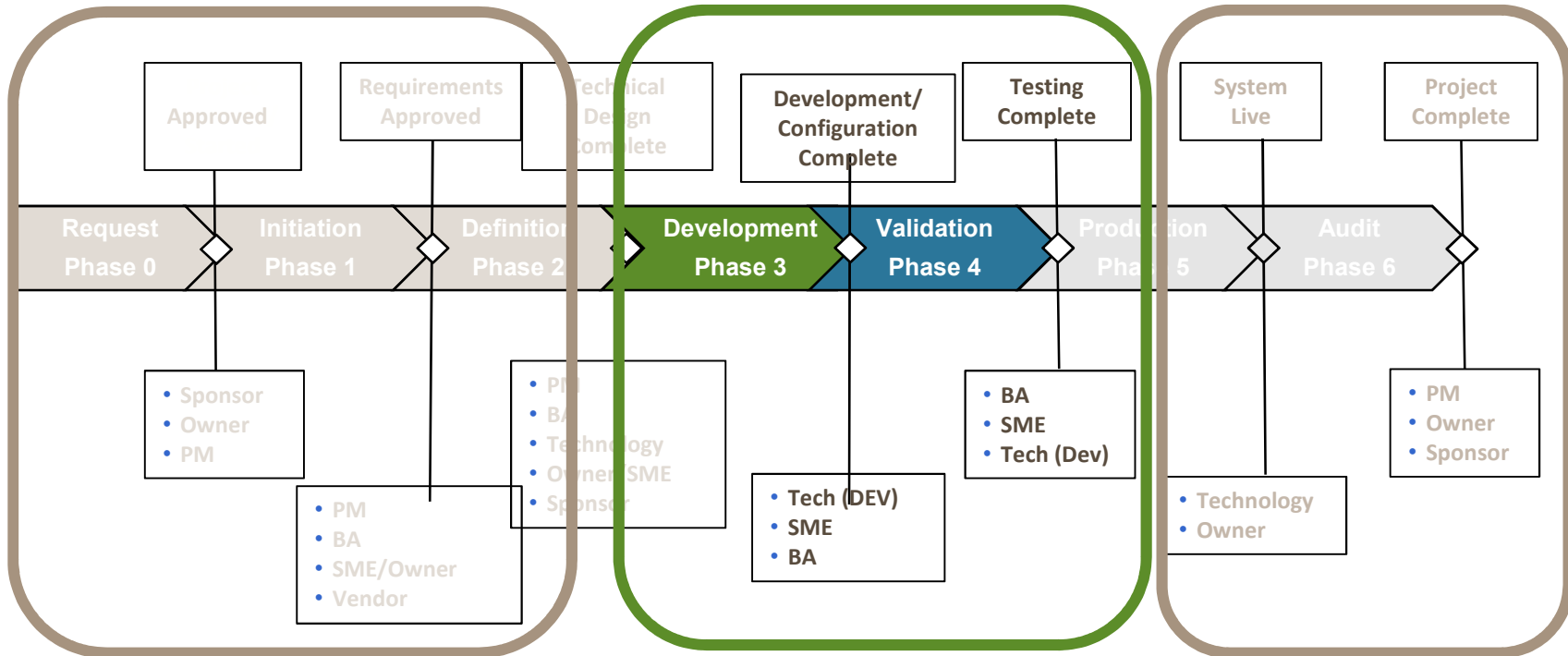
# PROJECT PLAN FINALIZED

Finalizing the project plan involves planning activities required for the remainder of the project phases.



# NEXT SESSION: DEVELOPMENT AND VALIDATION

## Key Phase Deliverables & Resource Expectations



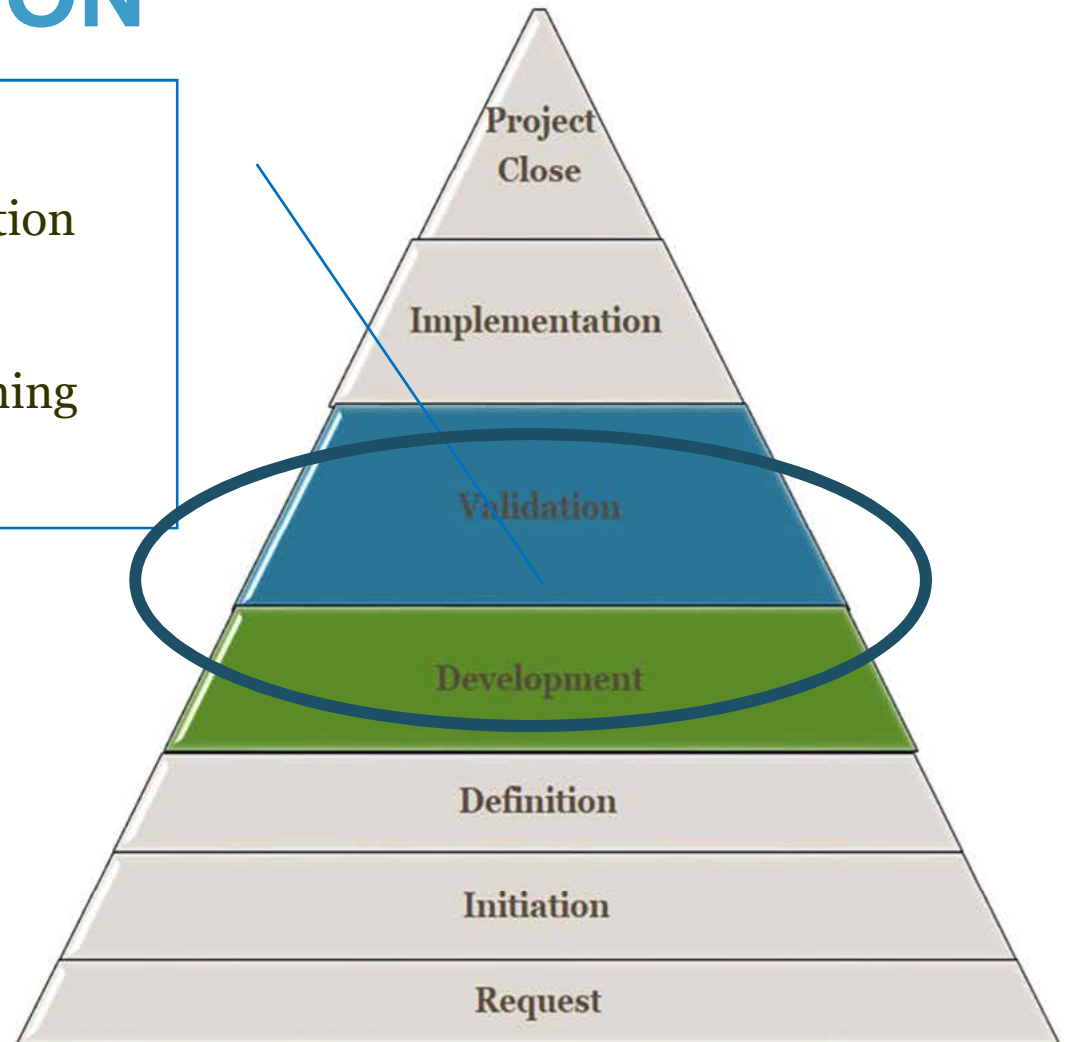
✓ STUDY/WALKTHROUGH  
SESSION 1 OF 3,  
INITIATE AND DESIGN

STUDY/WALKTHROUGH  
SESSION 2 OF 3,  
DEVELOPMENT  
AND VALIDATION

STUDY/WALKTHROUGH  
SESSION 3 OF 3,  
PRODUCTION AND  
PROJECT CLOSE

# NEXT SESSION: DEVELOPMENT AND VALIDATION

Test Scripts and Test Cases  
Development and/or Configuration  
Testing  
Training  
Roll-Out/Implementation Planning  
End User Documentation



# Questions?

**Don't Forget to Complete your**  
**Survey**

**Don't Forget to Register for**  
**Session 2 of 3; Development and Validation**

# APPENDIX

# PRIMARY TOOLS FOR THE RESEARCH PMO

- MS Office 365 Suite; Word, Excel, Visio, Skype, SharePoint (TBD), Outlook, Power Point, Teams, One Note and Project
- Smartsheet; sheets, forms, reports, dashboards and calendars
- Box and/or Google
- [Research PMO Website:](#)
  - Submit a question to us
  - Register for our next Brown Bag in FY21 Q2
  - Request Project or Process Improvement Support
- [Research PMO Portfolio;](#) Program and project visibility
- Coming Soon Research PMO Key Deliverables

*What tools are you using?*

# ADDITIONAL RESOURCES

- Take a class at CHOP:
  - Project Management
  - Applying Improvement Methods (AIM)
  - Leading Improvement Course (LIC)
  - MS Office
  - DISC with your team
  - CLI: Presenting with Impact: Presentations Skills Workshop
  - Virtual Meeting Technology Coaching Session

# REFERENCES

1. PMBOK Guide, A Guide to the Project Management Body Of Knowledge, 2018, Sixth Edition, Project Management Institute
2. Pisuwalar, Ubaid, 2019, A Comprehensive Guide on Agile Methods for Modern Software Development. Retrieved from <https://www.peerbits.com/blog/agile-software-development.html>



# GENERAL PROJECT ROLES AND DESCRIPTIONS

- Project Manager (PM) / Scrum Master (SM)
- Business Analyst (BA)
- Project Owner / Product Owner
- Subject Matter Expert (SME)
- Quality Assurance
- Executive Sponsor
- Stakeholder
- Technology / Scrum Team

\*Reference #1 & Appendix A

# APPENDIX A - PROJECT ROLES AND DESCRIPTION

- **Project Manager (PM)/Scrum Master (SM)** – The person authorized by the performing organization to lead the team that is responsible for achieving the project objectives
- **Business Analyst (BA)** – The person who serves as the liaison between the business community and the technical solution providers throughout the project life cycle
- **Project Owner / Product Owner** – An individual, or two, that has decision authority over the scope and deliverables for a project. They are typically a member of the project team.
- **Subject Matter Expert (SME)** – Typically a member of the business team, or an external consultant, assigned to the project to support requirements, testing and training activities.
- **Quality Assurance** – An individual or a group that implements the processes of auditing the quality requirements and the results from quality control measurements to ensure appropriate quality standards and operational definitions are used.
- **Executive Sponsor** – An individual or a group that provides resources and support for the project, program, or portfolio, and is accountable for enabling success
- **Stakeholder** – An individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio
- **Technology / Scrum Team** – Includes, but is not limited to, development, infrastructure, application or architecture support roles \*Reference #1

# KEY PROJECT TERMINOLOGY & ACRONYMS

- Statement Of Work – SOW
- Project Charter
- Project Scope
- Strengths, Weaknesses, Opportunities and Threats - SWOT
- Work Breakdown Structure - WBS
- Change Control Board - CCB
- Organizational Breakdown Structure - OBS
- Responsible, Accountable, Consult and Inform - RACI
- Time and Material - T&M
- Business Requirements
- Request For Proposal/Pricing - RFP
- Flowchart
- Gantt Chart
- Requirements Traceability Matrix

\*Reference #1 & Appendix B

# APPENDIX B - KEY TERMINOLOGY & ACRONYMS

- **Statement of Work (SOW)** – A narrative description of products, services, or results to be delivered by the project.
- **Project Charter** – The project charter is the document issued by the project initiator or sponsor that formally authorizes the existence of a project and provides the project manager with the authority to apply organizational resources to project activities. It documents the high-level information on the project and on the product, service, or result the project is intended to satisfy.
- **Project Scope** – The work performed to deliver a product, service, or result with the specified features and functions. The term “project scope” is sometimes viewed as including the product scope.
- **SWOT Analysis** – Analysis of strengths, weaknesses, opportunities, and threats of an organization, project, or option
- **Work Breakdown Structure (WBS)** – A hierarchical decomposition of the total scope of work to be carried out by the project team to accomplish the project objectives and create the required deliverables
- **Change Control Board (CCB)** – A formally chartered group responsible for reviewing, evaluating, approving, delaying, or rejecting changes to the project, and for recording and communicating such decisions
- **Organizational Breakdown Structure (OBS)** – A hierarchical representation of the project organization, which illustrates the relationship between project activities and the organizational units that will perform those activities

\*Reference #1

# APPENDIX B CONTD. - KEY TERMINOLOGY & ACRONYMS

- **RACI Chart** – A common type of responsibility assignment matrix that uses responsible, accountable, consult, and inform statuses to define the involvement of stakeholders in project activities
- **Time and Material Contract (T&M)** – A type of contract that is a hybrid contractual arrangement containing aspects of both cost-reimbursable and fixed-price contracts
- **Request for Proposal (RFP)** – A type of procurement document used to request proposals from prospective sellers of products or services. In some application areas, it may have a narrower or more specific meaning
- **Flowchart** – The depiction in a diagram format of the inputs, process actions, and outputs of one or more processes within a system
- **Gantt Chart** – A bar chart of schedule information where activities are listed on the vertical axis, dates are shown on the horizontal axis, and activity durations are shown as horizontal bars placed accordingly to start and finish dates
- **Business requirements** – These describe the higher-level needs of the organization as a whole, such as the business issues or opportunities, and reasons why a project has been undertaken.
- **Requirements Traceability Matrix** – The requirements traceability matrix is a grid that links product requirements from their origin to the deliverables that satisfy them. The implementation of a requirements traceability matrix helps ensure that each requirement adds business value by linking it to the business and project objectives.

\*Reference #1

# APPENDIX C - AGILE

- **Planning Phase** – Understanding the customers need and determining the requirements.
- **Analysis Phase** – The Analysis Phase is where you break down the deliverables in the high-level Project Charter into the more detailed business requirements.
- **Design Phase** – Depending on the subject of the project, the products of the design phase can include dioramas, sketches, flow charts, site trees, HTML screen designs, prototypes, photo impressions and UML schemas.
- **Implementation Phase** – The project takes shape during the implementation phase. This phase involves the construction of the actual project results.
- **Testing Phase** – During the testing phase, developers find out whether their code and programming work according to customer requirements. And while it's not possible to solve all the failures you might find during the testing phase, it is possible to use the results from this phase to reduce the number of errors within the software program.
- **Maintenance Phase** – The maintenance phase of the SDLC occurs after the product is in full operation. Maintenance of software can include software upgrades, repairs, and fixes of the software if it breaks. Software applications often need to be upgraded or integrated with new systems the customer deploys.

\*Reference #2