

RESEARCH PMO BROWN BAG LUNCH

THURSDAY, MARCH 18, 2021

**“PROJECT MANAGEMENT CASE
STUDY/WALKTHROUGH SESSION 3 OF 3” –
PRODUCTION & PROJECT CLOSE**

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
- Re-Cap of Phases 1 and 2; Phases 3 and 4
- Project Deliverable, Overview and Approach
- Project Phases and Phase Deliverables
- Project Implementation Phase
- Project Close-Out Phase
- 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

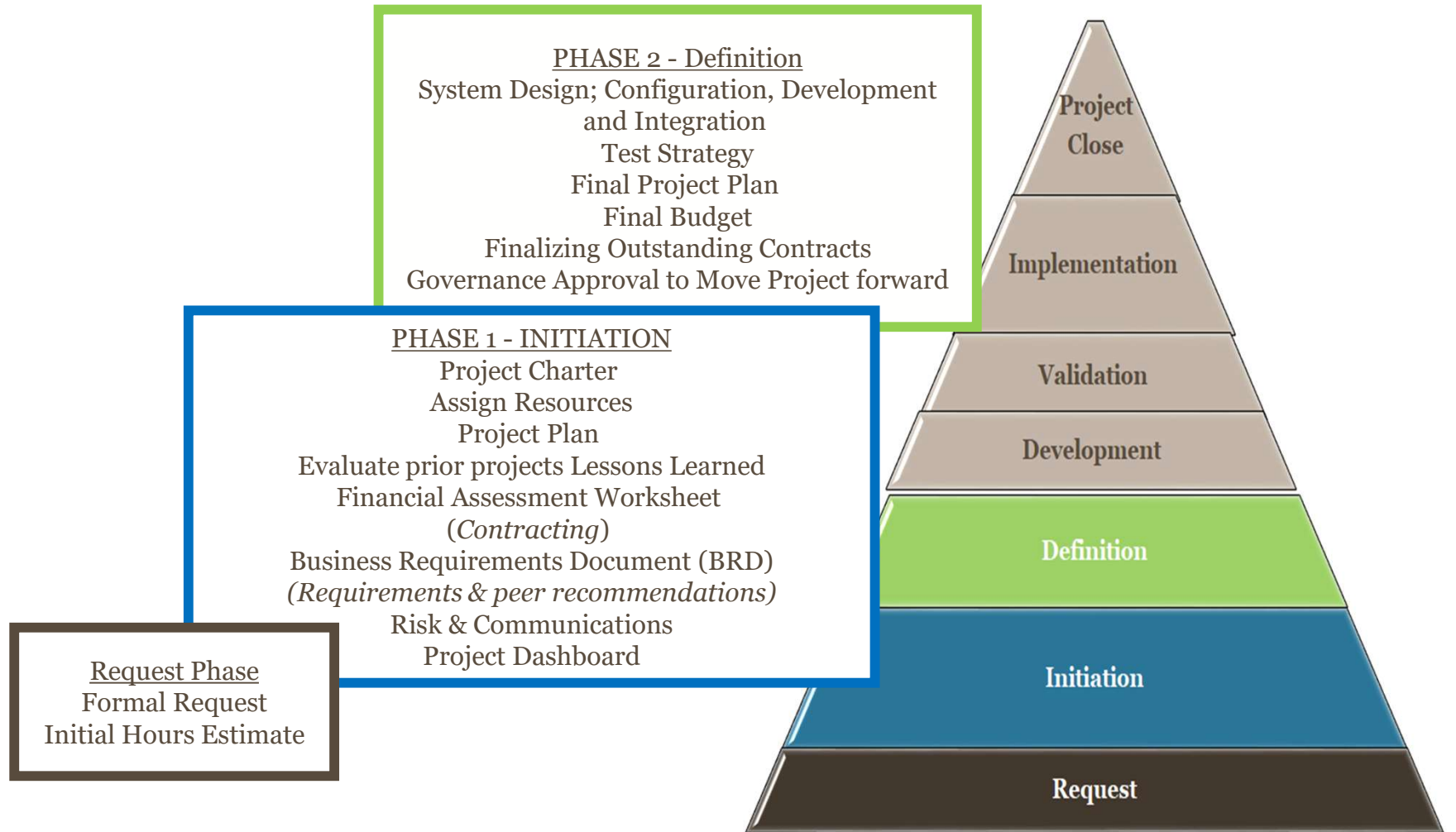
INTRODUCTIONS

- PMO
 - Team intros: Margeya, Anne and Shareen
 - Special Guest: Michael Gerrity
- 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.

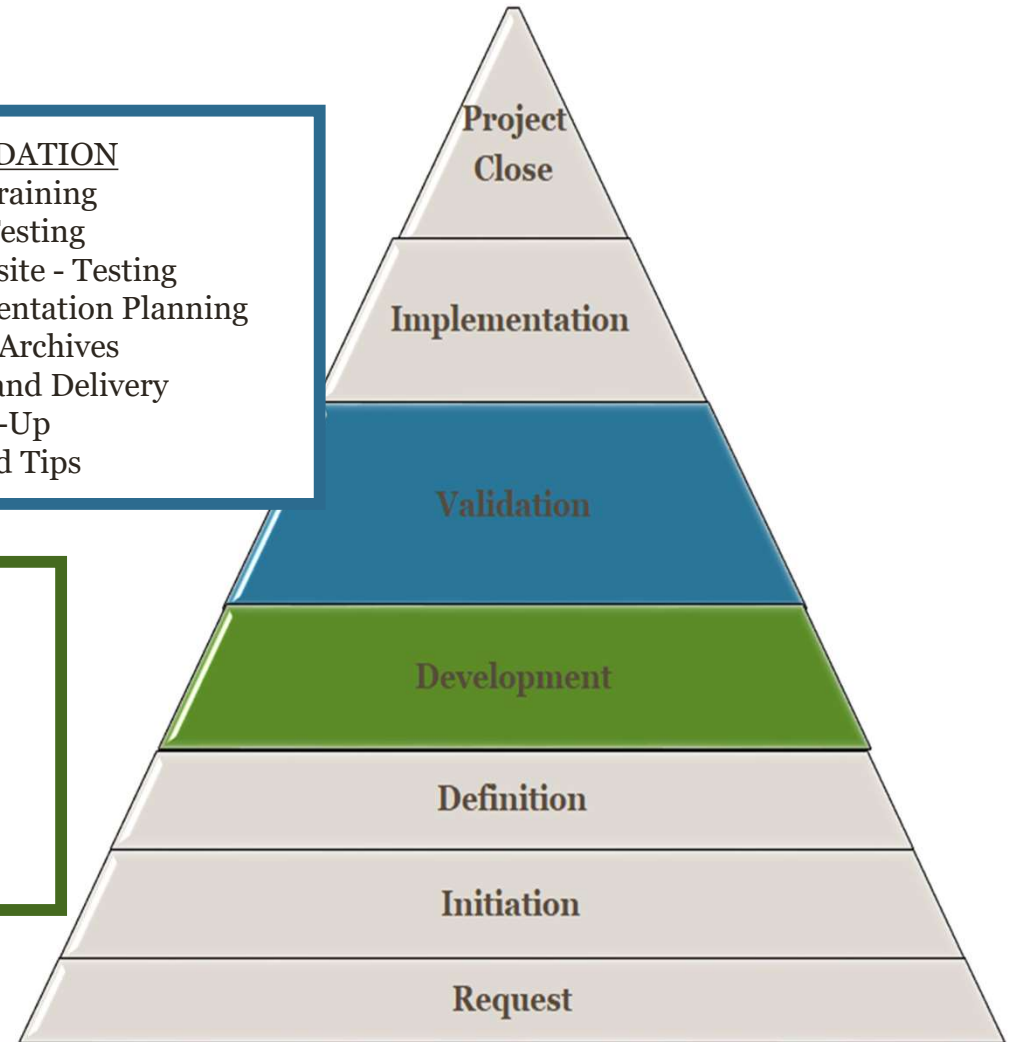
RE-CAP OF PHASES 1 AND 2



RE-CAP OF PHASES 3 AND 4

PHASE 4 – VALIDATION
Early Adopter Training
Early Adopter Testing
Chop RI Internal Website - Testing
Finalize Roll-Out / Implementation Planning
Promotion of Lab Archives
Webinar Promotion and Delivery
ELN Site Set-Up
User Guides and Tips

PHASE 3 – DEVELOPMENT
Test Scripts and Test Cases
Development and/or Configuration
Testing
Training
Roll-Out/Implementation Planning
End User Documentation



LAB ARCHIVES PROJECT ROLES

- **CHOP Project Resources**

- Executive Sponsors
- Project Manager
- Business Analyst
- Project Owner
- Research Information Systems Manager
- Research Application Technical Resources
- External SME
- Enterprise Technical Resources
- Research Web Resources
- Supply Chain/Legal Resource(s)
- User Groups/SME
- Communications & Creative Services
- Functional Operations Resource(s)

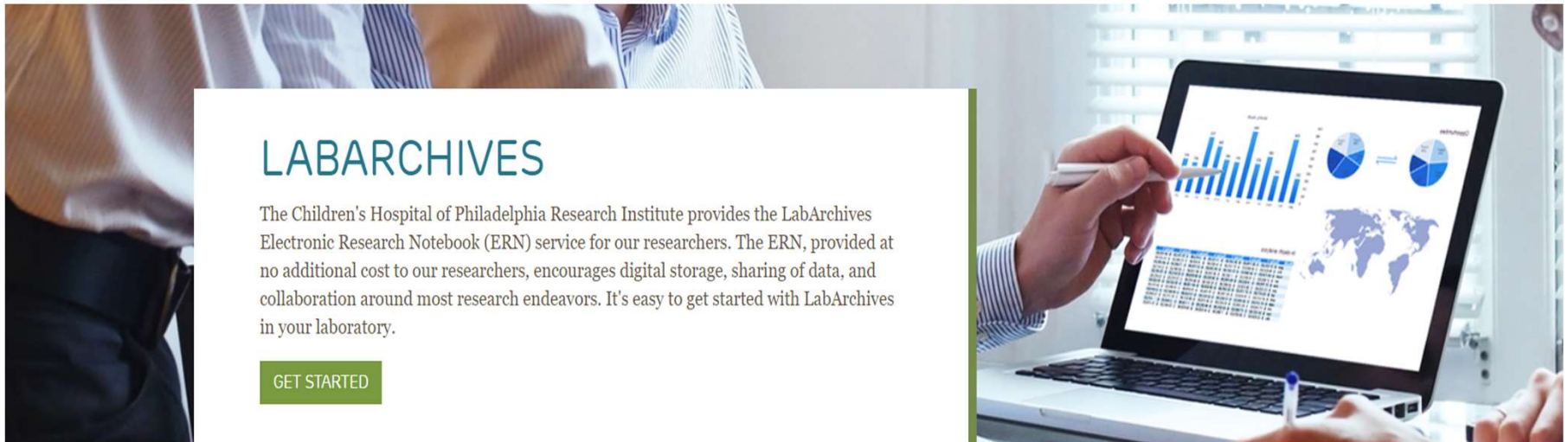
- **Lab Archive Resources**

- Client Representative
- Project Manager
- Trainer
- Technical Resources

LAB ARCHIVES OPERATIONS ROLES

- CHOP Ops Resources
 - Research Application Services (Jira/email/promotions)
 - Enterprise Support (Service Now)
 - CRSO Functional Operations Resource/Advocate (TBD)
- Lab Archive Ops Resources
 - Technical Resources
 - Service Desk

PROJECT DELIVERABLE



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

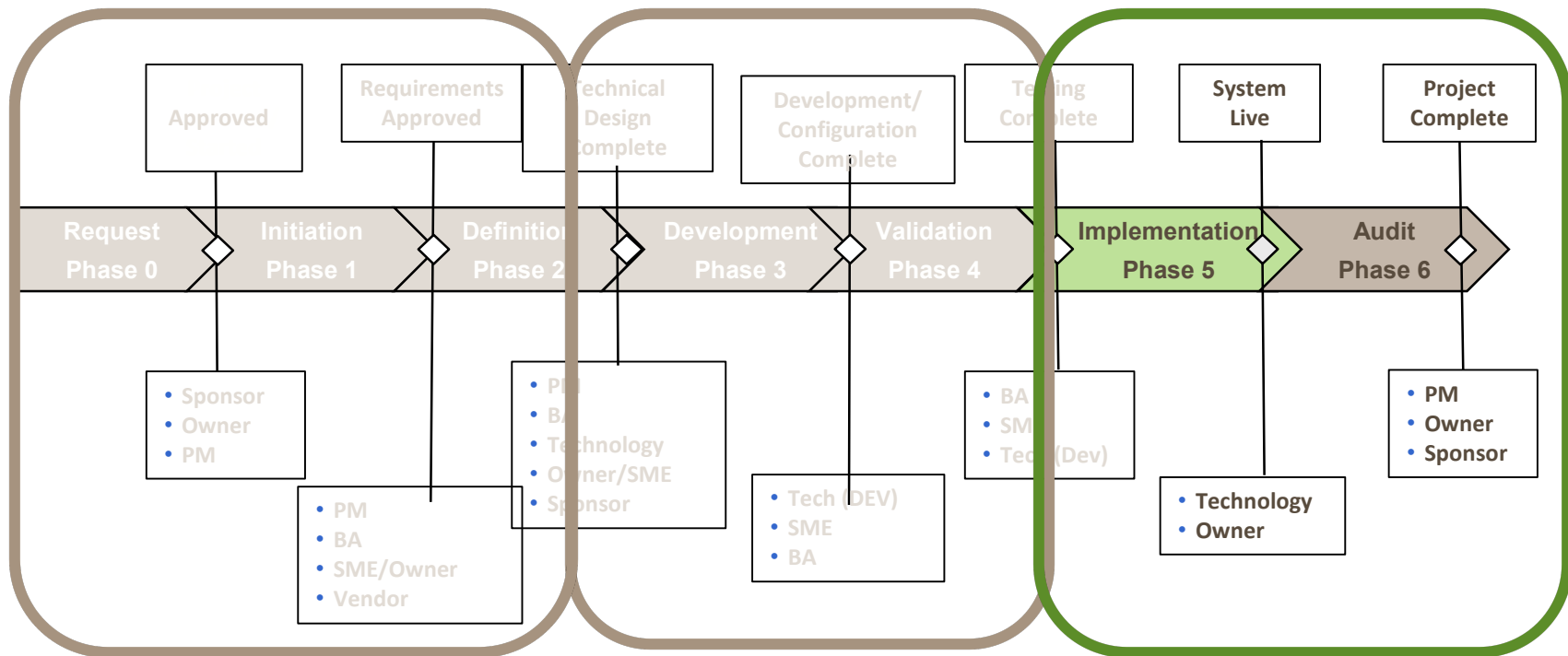
- Within the CHOP Research Institute, a need was identified to enable our investigators access to a collaborative tool that is specifically designed for the storage, organization, sharing, collaboration, and publishing of scientific research.
- Penn Hospital and University is currently utilizing Lab 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 performed 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.

RIS APPLICATION SERVICES - MICHAEL GERRITY

- Provide application, database, and analysis/analytics support to the CHOP Research Institute.
- Assist with evaluating existing CHOP solutions and in-house custom development possibilities meeting application needs and vetting 3rd party options.
- LabArchives Project support activities; Business Analytics, Requirements Gathering, Portal Content, Design Collaboration, Application Testing, Piloting, Site Administration and Configuration.
- Worked with Research PMO on LabArchives, Link2Care, Animal Electronic Medical Records (EMR) RFP
- gerrity@chop.edu
- <https://www.research.chop.edu/ris-application-services>

CASE STUDY / PROJECT PHASE OVERVIEW

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, IMPLEMENTATION AND AUDIT

FINALIZED PROJECT PLAN

☆ Copy of Lab Archives Project Plan

WBS	Task Name	Planned Start Date	Actual End Date	% Complete	Work	Status
3	Phase 3 - Development/Configuration/Test Planning	/25/19	07/23/19	100%	70.40086467	Complete
4	Phase 4 - Validation (Training and Webinar Planning)	/09/19	08/07/19	100%	231.0h	Complete
5	Phase 5 - Production (Roll Out & Webinars)	/29/19	08/12/19	100%	145.6h	Complete
5.1	Pre go-live activities	/29/19	07/30/19	100%	129.6h	Complete
5.1.1	Post Pilot/ Final System Setup & Prep	/17/19	07/17/19	100%	8.0h	Complete
5.1.2	Set Go Live Date	/29/19	07/18/19	100%	32.0h	Complete
5.1.3	Pre-launch communication to existing users	/19/19	07/23/19	100%	9.6h	Complete
5.1.4	Exclusive Professional Edition Webinars	/24/19	07/24/19	100%	16.0h	Complete
5.1.5	Advanced Features Webinars	/25/19	07/25/19	100%	16.0h	Complete
5.1.6	On-site Training	/26/19	07/26/19	100%	16.0h	Complete
5.1.7	Custom Webinars	/29/19	07/29/19	100%	16.0h	Complete
5.1.8	Widget consultations	/30/19	07/30/19	100%	16.0h	Complete
5.2	Go-live Phase - Primary roll-out to Research Institute	/30/19	07/30/19	100%	0.0h	Complete
5.3	Post go-live activities	/31/19	08/12/19	100%	16.0h	Complete
6	Phase 6 - Audit - TBD	/13/19	08/21/19	100%	0.0h	Complete
6.1	Conduct Post Project Review	/13/19	08/13/19	100%	0.0h	Complete
6.2	Document Lessons Learned	/14/19	08/14/19	100%	0.0h	Complete
6.3	Submit end of Project Survey	/15/19	08/15/19	100%	0.0h	Complete
6.4	Transition to Support	/16/19	08/16/19	100%	0.0h	Complete
6.5	Project Control	/19/19	08/21/19	100%	0.0h	Complete
6.5.1	Prepare for Gate 6	/19/19	08/19/19	100%	0.0h	Complete
6.5.2	Conduct Gate 6 Review	/20/19	08/20/19	100%	0.0h	Complete
6.5.3	Update Tracker and all project documentation	/21/19	08/21/19	100%	0.0h	Complete

PROJECT IMPLEMENTATION / "GO-LIVE"

PHASE 5

PROJECT IMPLEMENTATION / "GO-LIVE" PHASE

PHASE 5 – Implementation

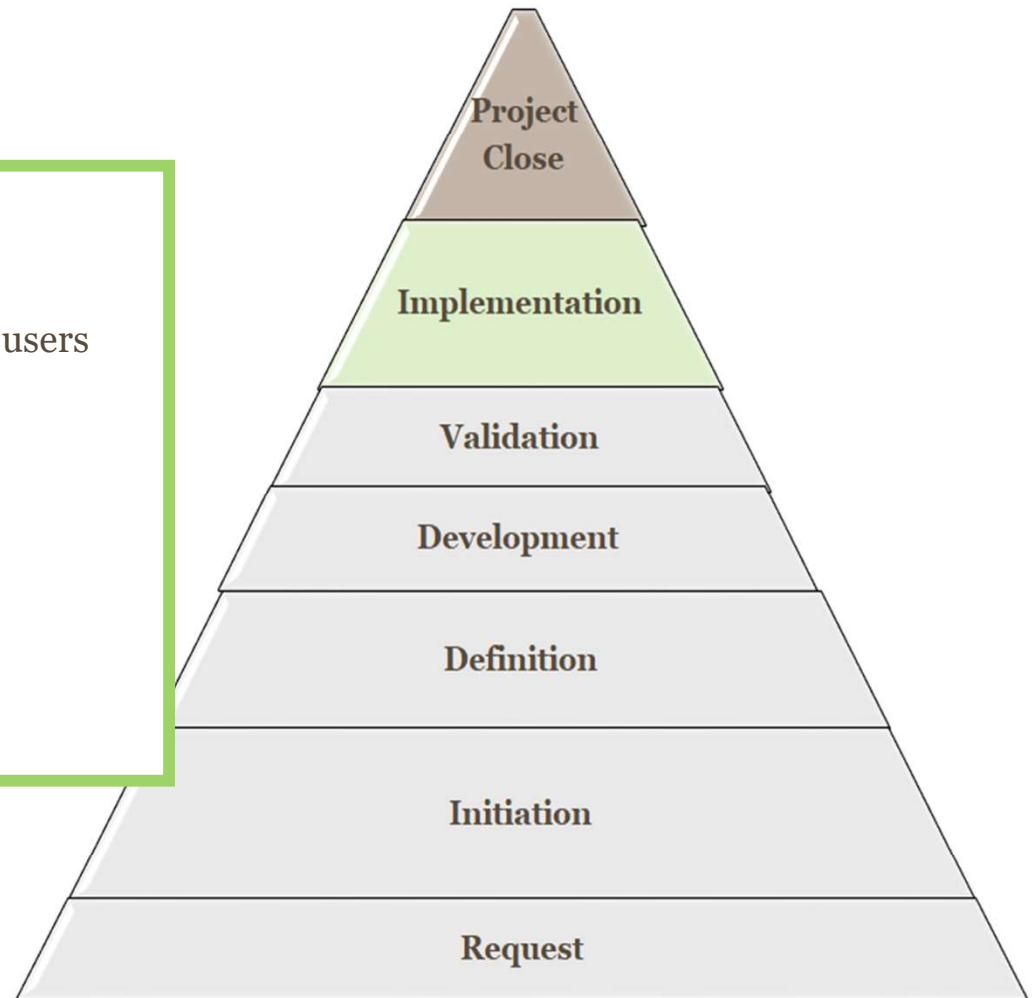
Pre-go live activities

- Final system setup & prep
- Pre-launch communication to existing users
- Training
- Approach i.e., Train the trainer
- On-Site or Webinars
- Widget consultations

GO-LIVE

Post-go live activities

- Support Review/Warranty period
- Ongoing Support/Operational support



PRE-GO LIVE ACTIVITIES

- Post Pilot/ Final System Setup & Prep
 - Determine who will be part of the ELN team and point of contact
 - Single Sign-On Access
 - Organization-Wide Settings
 - Support Plan
 - Training
 - Roll-out Plan
 - Spreading the Word

SET GO-LIVE DATE

- SSO/Shibboleth
- Box
- LabArchives (involved announcement of service availability and training dates)
- CHOP Website for LabArchives End Users

PRE-LAUNCH COMMUNICATIONS

- LabArchives offered to send communication to all current users at CHOP or provide CHOP with email template and list of users
- CHOP created end user communications and customer go-live notice

END USER COMMUNICATIONS

LABARCHIVES ELECTRONIC LAB NOTEBOOKS
NOW AVAILABLE



LabArchives Electronic Research Notebook is now available free of charge to CHOP researchers.

LabArchives is the leading secure, Cloud-based, electronic research notebook application service. The system encourages digital storage, sharing of data, and collaboration.

It integrates with data-analysis programs and ensures protocols are easily understood by colleagues, enhancing collaboration and improving regulatory compliance.

Visit <https://labarchives.research.chop.edu> to learn more.

Questions? Contact the Research Information Systems Applications team at risapplications@email.chop.edu.



Children's Hospital of Philadelphia Research Institute | 3501 Civic Center Blvd., Philadelphia, PA 19104

TRAINING

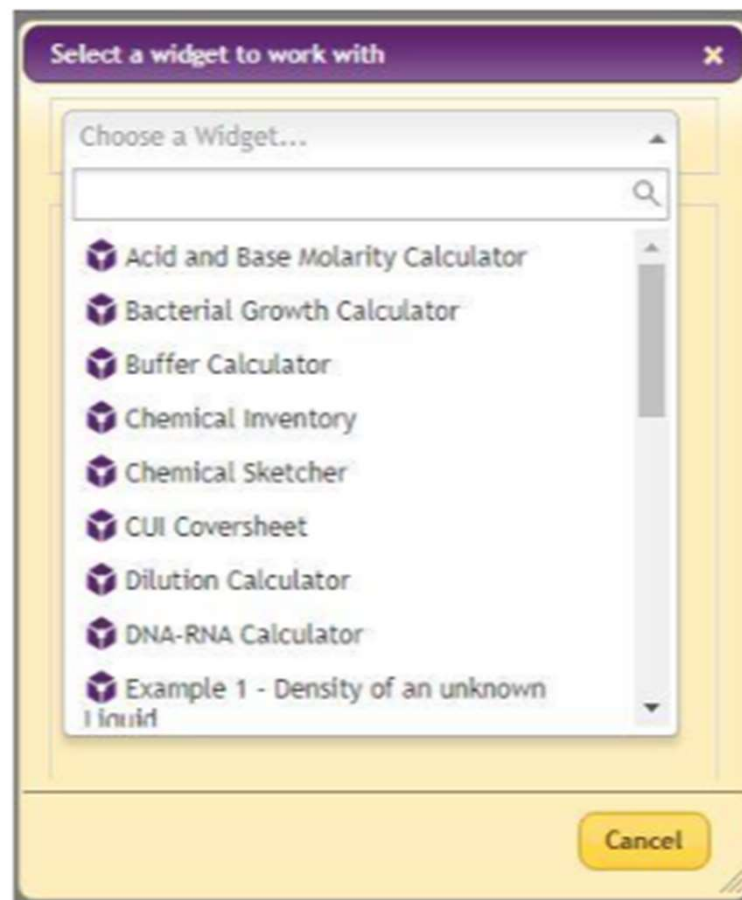
- Exclusive Professional Edition Webinars
 - Scheduled 6 webinars, twice a year at various times over 3 weeks, which were open to Research community members
- On-site Training
 - On-site training (1-2) in first year, webinar 1-2 per month scheduled in coordination with CHOP. Recommended inviting a panel of current users for a research/instructor perspective on using LabArchives
- Custom Focused Webinars
 - Scheduled as needed for select labs or research groups
- <https://mynotebook.labarchives.com/>

MY NOTEBOOK - LABARCHIVES

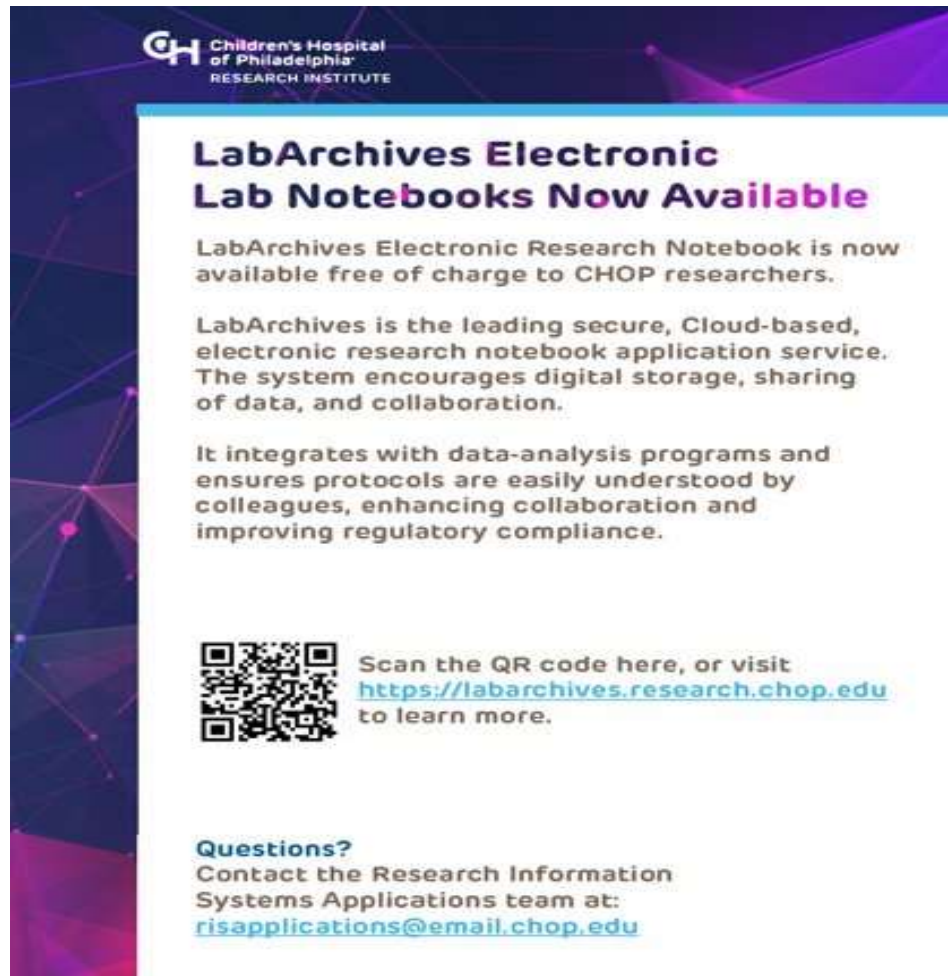
The screenshot displays the 'My Notebook' interface on the 'labarchives.com' website. The browser's address bar shows 'mynotebook.labarchives.com'. The page header includes the Children's Hospital of Philadelphia Research Institute logo and a search bar. A notification banner at the top states 'LabArchives ELN is now mobile friendly!'. The main content area is titled 'PMO Brown Bag #2' and contains a text block: 'This shows an example of material that was used in PMO Brown Bag session #2'. Below this text is a PDF attachment titled 'Example_test_file.pdf(173.1 KB)'. A 'Widget Manager' menu is open on the right side of the page, listing various tools such as 'Scientific Calculator', 'Unit Converter', 'Chemical Inventory', and 'Dilution Calculator'. The Windows taskbar at the bottom shows the system time as 8:45 AM on 3/11/2021.

WIDGET CONSULTATION

- Widgets allow users to extend the capabilities of LabArchives. Forms, templates, and custom programs can be created within the Notebooks
- Trainings were scheduled as requested



GO-LIVE PHASE




CH Children's Hospital
of Philadelphia
RESEARCH INSTITUTE

LabArchives Electronic Lab Notebooks Now Available

LabArchives Electronic Research Notebook is now available free of charge to CHOP researchers.

LabArchives is the leading secure, Cloud-based, electronic research notebook application service. The system encourages digital storage, sharing of data, and collaboration.

It integrates with data-analysis programs and ensures protocols are easily understood by colleagues, enhancing collaboration and improving regulatory compliance.



Scan the QR code here, or visit <https://labarchives.research.chop.edu> to learn more.

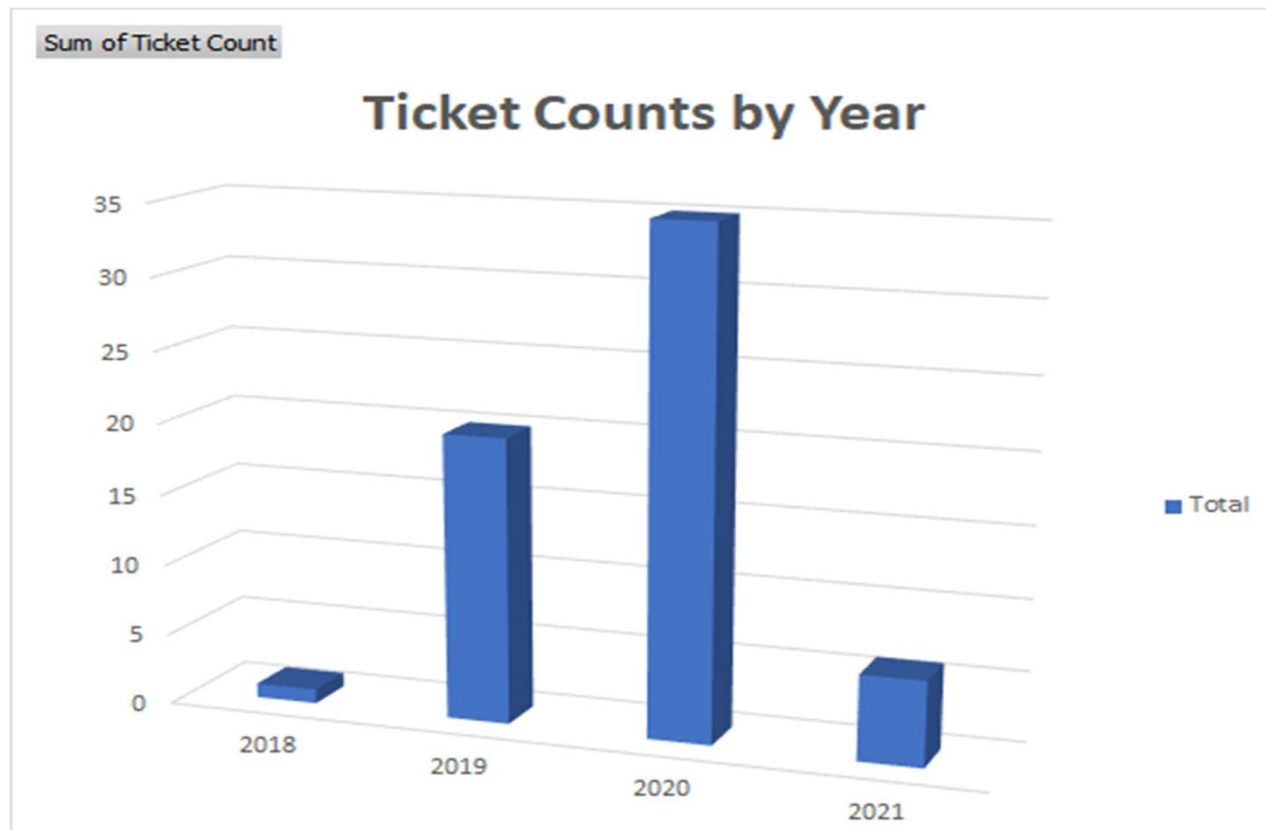
Questions?
Contact the Research Information Systems Applications team at: risapplications@email.chop.edu

Primary roll-out to the Research Institute

POST-GO LIVE ACTIVITIES

- Warranty Support Review
- Vendor Service Level Agreement
- Transfer to Operational Support in RIS

SUPPORT TRANSITION FROM WARRANTY TO PRODUCTION

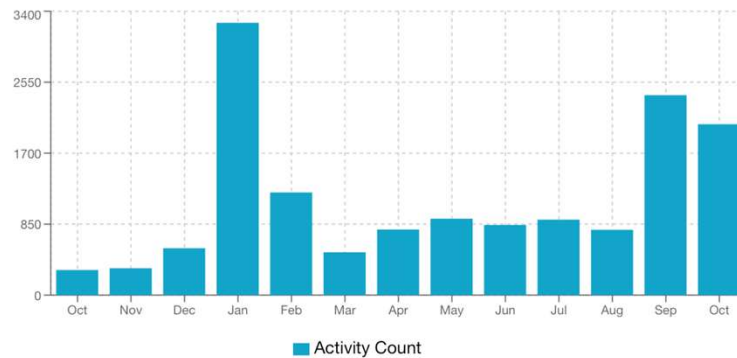


Annual number of issues logged and supported by LabArchives

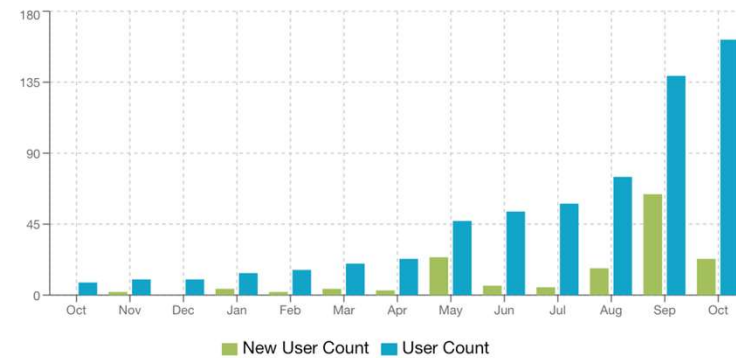
USER ACTIVITY 2018-2019

Children's Hospital of Philadelphia

Activity Count



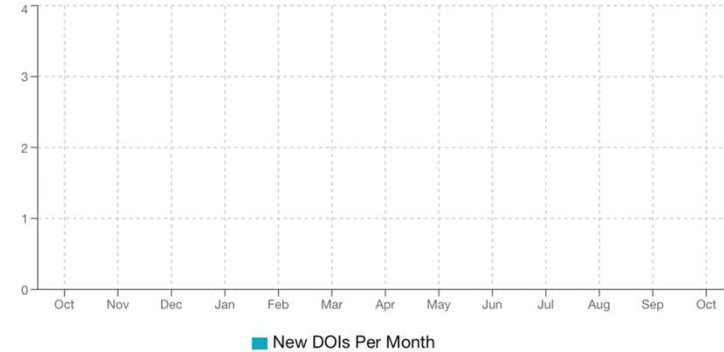
User Counts



Total Sessions



New DOIs Per Month



Pre-Go Live Data, Oct 2018 – Oct 2019

USER ACTIVITY 2020-2021



Post Implementation Data Mar 2020 – Mar 2021

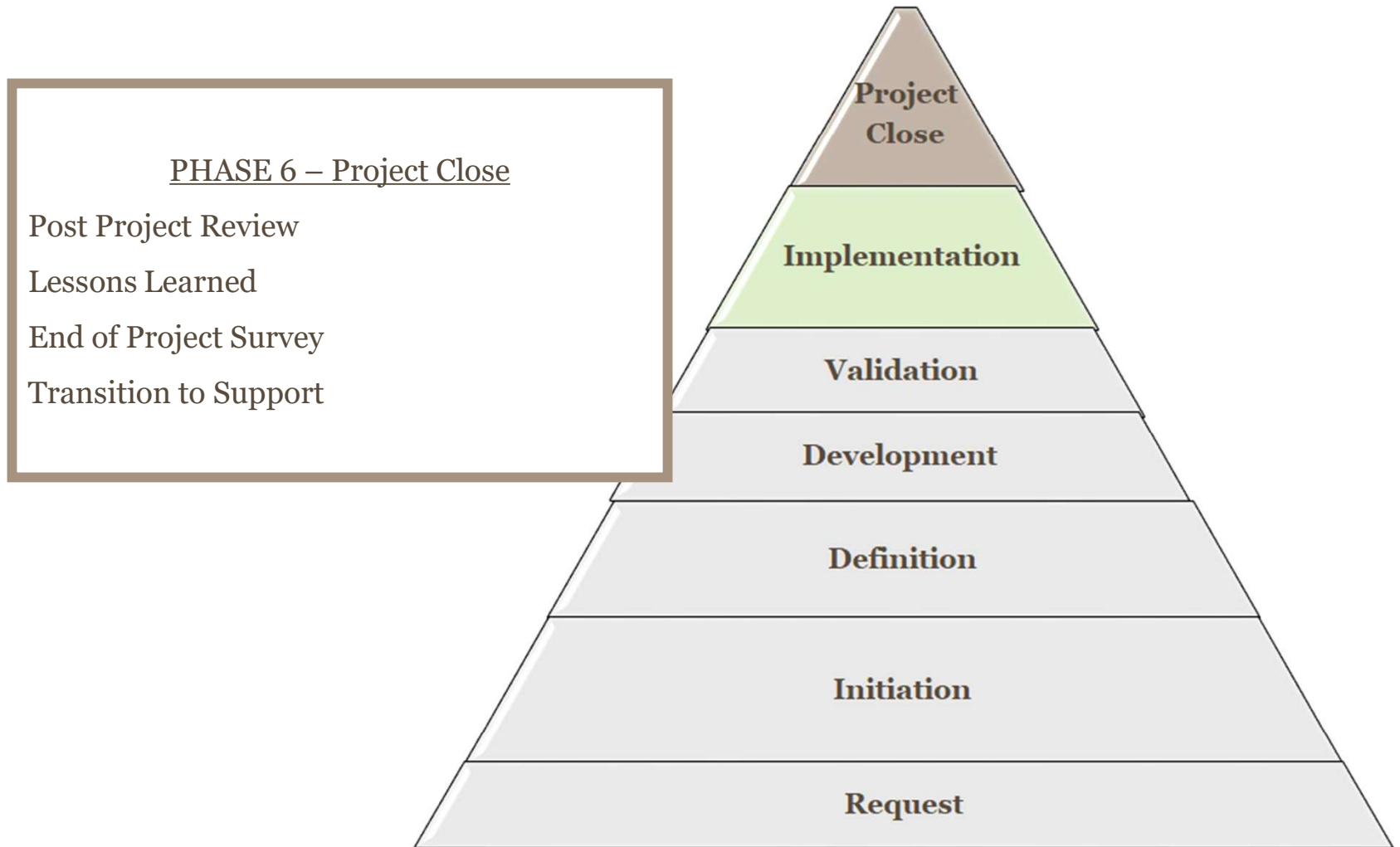
VENDOR SERVICE LEVEL AGREEMENT

- 9am – 8pm EDT, Monday through Friday during which time, tickets are responded to within 1 hour or less. Weekends and non-business days are also covered with potentially longer response times
- The team is equipped to provide support from basic account access assistance to assistance with custom HTML widgets or more complex items
- Support is available daily via email, phone or online chat. Some in-person training 1-2 times year 1 as well
- LabArchives handles 100% of the direct support to all end-users

PROJECT CLOSE-OUT

PHASE 6

PROJECT CLOSE-OUT PHASE



POST PROJECT REVIEWS

- Reviewed with RIS
- Reviewed with CRSO
- Post Go-Live Early Adopters Survey and Feedback

LESSONS LEARNED

- Post implementation project planning lacking
- Product adoption and ownership
- Adequately preparing for training
 - Technology preparation
 - Ensure tech support staff are at hand
 - Ensure training materials are customized for target the audience

"The purpose of lessons learned is to bring together any insights gained during a project that can be usefully applied on future projects." - projectmanagement.com

ONGOING PROMOTIONS

Suggested Activities for Research Staff During the COVID-19 Assignment to Remote Work

** Amendments to the original version of this document dated April 14, 2020.*

PROJECT-SPECIFIC ACTIVITIES

(These activities may be completed and the effort expended can continue to be charged to the project grant or contract:)

I. Internal and External Virtual Training Opportunities

- [CHOP ATOP Basic/Translational Research Community Forums*](#)
- [CHOP Research Events & Symposiums](#)
- [CHOP ARCUS Data Education](#)



Events

[Discover How LabArchives Can Help You Make Breakthroughs](#)

CSO Connection



Research Insider

Discovery Day

Promoted throughout the Research community with demo's, marketing pamphlets, and live Q&A

PROJECT CONTROLS: STATUS REPORTING EXAMPLE

- 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 [dashboard](#) may be shared to provide the project status

Weekly Status
LabArchives

Project Manager Anne E. Geary **Updated on :** 8/21/19

Overview
(short description)

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.

Initiation Phase 2

Definition Phase 2

Development Phase 3

Validation Phase 4

Production Phase 5

Audit Phase 6 ★

Milestones X

Schedule	Status, % Complete	Planned	Actual/ Revised
1 - Initiation	100%	3/27/19	4/10/19
2 - Definition	100%	5/3/19	5/23/19
3 - Build	100%	5/8/19	7/23/19
4 - Test/Validation	100%	7/1/19	8/7/19
Go-Live	100%	7/18/19	7/30/19
5 - Production	100%	7/31/19	8/12/19
6 - Audit	100%	8/9/19	8/21/19

Risks & Issues (New) complete list is available... X

Issues

- No outstanding issues

Risks

- No outstanding risks

Key Updates

Current Phase Accomplishments (To-Date/Since last update)

- ✓ Go Live activities have been completed to include team review and approval of:
 - Warranty Support
 - Vendor SLA
 - Transfer of Operational Support to CRSO
- ✓ Close out/audit activities have been completed to include:
 - Post project review
 - Lessons Learned
 - End of project survey
 - Support transition plan

Next Steps/Actions (with Dates)

N/A

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

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
 - RIS Discovery Day (TBD, 10/2021)

Questions?

Don't Forget to Complete your Survey

**Please let us know what you would like our next Brown Bag
Topic to be when completing your survey**

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
 - Request Project or Process Improvement Support
- [Research PMO Portfolio;](#) Program and project visibility
- [Research PMO Key Deliverables](#)

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