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# CERP Guidance Memorandum

*South Florida Water Management District – Jacksonville District, U.S. Army Corps Of Engineers*

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**CGM NUMBER-REVISION:** 025.00

**EFFECTIVE DATE:** October 28, 2003

**CATEGORY:** Program Controls

**SUBJECT:** CERP Zone P3e Protocol Management

**DESCRIPTION:**

This memorandum provides guidance to the staffs of both Jacksonville District, U.S. Army Corps of Engineers (USACE) and South Florida Water Management District (SFWMD). As part of the CERP implementation, the SFWMD and the USACE have established an information system to provide a joint and common data set for the analysis, performance measurement, and for certain non-proprietary reporting of program and project management information. This system is referred to as the CERP Project Management Information System (PMIS). This system is administered by the Program Controls Division of the SFWMD and the Program Controls Branch of the USACE; representing the implementing agencies' "Program Controls" function. A major component of this system is the Primavera P3e project management software maintained in the shared environment commonly referred to as the CERP Zone. As data is shared between the two organizations and will be transferred between data bases for the purpose of COE Reporting, maintaining consistency within the database is of primary importance.

The intent of PMIS is to provide a clear and accurate representation of the current status of the projects, best forecast of the anticipated future performance of the work effort and the basis for accurate and prudent program management. The accuracy of the reporting is dependent on the quality of the individual project schedules, which is the responsibility of the Project Managers. To aid in this effort, Program Controls will perform objective reviews of project schedules.

The administration of the P3e database, due to the interaction of differing techniques, standards and data sources, must be strictly managed in order to maintain a consistent means of managing and maintaining the project controls tools. This CGM is intended to establish the P3e Protocols Document as the living document containing the standard specification for the joint use of the P3e software and establish the procedure for

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agreeing and documenting changes to the P3e protocols. Compliance to the guidance contained in this CGM is the responsibility of Program Controls and Project Management.

## **GUIDANCE:**

### **I. P3e Protocols Document**

The P3e Protocols Document (insert link) is the standard specification for roles and responsibilities, procedures, settings, options, data structure and usage of the P3e system as implemented in the management of the CERP Program. All personnel utilizing the P3e system must comply with the standards contained in the P3e Protocols Document. The protocols may be changed, as needed, by the P3e Change Control Board described in II.1. The protocols document will be posted in the CERP Zone and will be updated as described in II.3.

### **II. P3e Protocols Document Change Control Process**

Changes to P3e Protocols Document, including updates and additions, may only be made using the Change Control Process to ensure that such changes do not cause undesirable impacts and have been agreed to by both parties. The Change Control Process will ensure that changes are reviewed and agreed at the appropriate level of management and properly documented and that potential changes are aligned to the needs and goals of the partnering organizations.

#### **1. Change Control Authority**

Anticipated changes may have broad impact on the users of the system. Proposed changes will be reviewed and approved by the P3e Change Control Board. The P3e Change Control Board will consist of the SFWMD Project Controls Manager and COE P3e Program Controls Manager or their designees. The P3e Change Control Board members will be named in the P3e Protocols Document.

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Given the minimal size of the board, formal meetings will not be required, but, at minimum, communication via telephone or email will be needed to ensure concurrence. All approved changes will be logged by the implementing party in the P3e Protocols Document Change Control System Log to be established in the CERP Zone.

Other changes contemplated as a matter of day to day administration such as “Access/User” changes will not require Change Control approval. These changes may be made by the System Administrator.

The table shown in Figure 1 is intended to represent typical changes and the prescribed level of change control and documentation.

<b>Change</b>	<b>P3e Change Control Board Approval Needed</b>	<b>Change Control Log Needed</b>
<b><i>System Configuration changes</i></b>		
Any modification to the shared EPS	Yes	Yes
Any modification to Baseline Types	Yes	Yes
Any modification to the OBS	Yes	Yes
Any modification to Administrative Preferences	Yes	Yes
Any modification to Global Activity Codes	Yes	Yes
Any modification to Notebook Topics	Yes	Yes
Any modification to User Defined Fields	Yes	Yes

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Any modification to Project Codes	Yes	Yes
Any modification to the resource structure	Yes	Yes
<b>System Content changes</b>		
Import of new projects (.xer files) to the "Approved" node	Yes	Yes
Import of new projects (.xer files) to the "WIP" node	Yes	Yes
Creation and modification of baseline projects under the "Approved" node.	Yes	Yes
The addition of resources/cost accounts within the standard structure	No	No
The deletion of resources	Yes	Yes
Changes to resource rates	Yes	Yes
Any modification to Global Layouts	Yes	Yes
Any modification to Global Reports	Yes	Yes
Any modification to Global Calendars	Yes	Yes
Any modification to Job Services or scripts which modify data	Yes	Yes
Any modification to activities, logic, resource assignment or coding done as part of regular project specific schedule maintenance or progress update	No	No
<b>Access/User Changes</b>		
Addition of users	Each P3eChange	No

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	Control Board Member may approve unilaterally	
Modification of user access profile other than standard	Yes	Yes

Figure 1 – Anticipated Changes and Required Actions

The above list of potential changes is not intended to be all-inclusive, further details may be reviewed in the referenced P3e Global Profiles and P3e Project Profiles. Project-only activity codes may be added, deleted and freely modified by the Project Managers and/or the P3e Experts. Within the ‘Work in Progress’ node of the EPS, Project Managers may also create and delete projects and baselines as defined in the P3e Protocols Document.

## 2. Documentation of changes

The CERP P3e Administration Change Control Log (sample shown in Figure 2) will be used to document changes made. The Change Control Log will be accessible in the CERP Zone.

CEPR P3e Administration Change Control Log										
Change #	Requestor		Change	Justification	Authorizations		Administrator Implemented			Accept/Reject
	Name	Date			SFWMD	CESAJ	Name	Date	Time	
1										
2										
3										
4										
5										

Figure 2 – Sample CERP P3e Change Control Log

## 3. Update of P3e Protocols Document

The P3e Protocols Document, accessible in the CERP Zone, will be annotated with changes as they are made using the ‘track changes’ feature of the word processing

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software. As changes are made, emails will be sent by the P3e administrators to notify users of the change to the system. The P3e Protocols Document will continue to be modified utilizing the 'track changes' feature to show implemented changes. At the month end prior to the Project Manager's Quarterly Meeting, the changes will be summarized and presented to the attendees of the Project Manager's Quarterly Meeting. Upon completion of the presentation, the changes will be accepted within the document.

## **APPLICATION:**

Effective immediately, this CERP Guidance Memorandum will be used to provide a joint and common data set for the analysis, performance measurement, and certain non-proprietary reporting of program and project management information.

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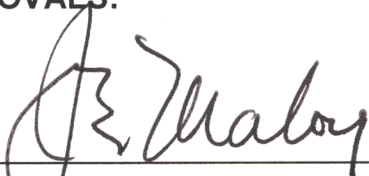
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## APPROVALS:



**John R. (Jack) Maloy**  
Chief Executive Consultant, Water Resources  
South Florida Water Management District

DATE: 10/28/03



**Dennis R. Duke**  
CERP Program Manager,  
U.S. Army Corps of Engineers

DATE: 10/28/03

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