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Project Charter Instructional Manual

January 2014

PROJECT CHARTER INSTRUCTION MANUAL

Understanding the Charter Process

Last Updated
December 4, 2013

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BASICS OF PROJECT MANAGEMENT

OVERVIEW OF PROJECT MANAGEMENT

This section covers the main principles and concepts of project management, the different roles and responsibilities that people will have in a project, and the hierarchy within a project team.

DEFINITIONS

This is a brief list of basic terminology that you will need to be familiar with before you begin managing your project.

Project—A temporary endeavor undertaken to create a unique product or service.

Project Management—The discipline of planning, organizing, securing, and managing resources to achieve the successful completion of specific project goals and objectives.

Project Management Principles—The concepts, tools, techniques, plans, and forms used by an organization to manage a project.

Project Manager—The individual who has been assigned the responsibility of managing the project using project management principles.

Project Sponsor—The individual assigned to the project as an executive representative.

Project Owner—The individual assigned by the Project Sponsor to provide oversight of the project –or– who represents the business unit that is requesting the project.

Project Team Members—The individuals assigned to the project that have knowledge, expertise, or skills important to the success of the project.

Resource Managers—The supervisors or managers with the authority to assign resources to tasks and recommend SMEs to the team.

Team Leaders—The individuals who have been assigned the authority to assign district resources to tasks and recommend SMEs to the team.

Stakeholders—All key individuals involved in the project.

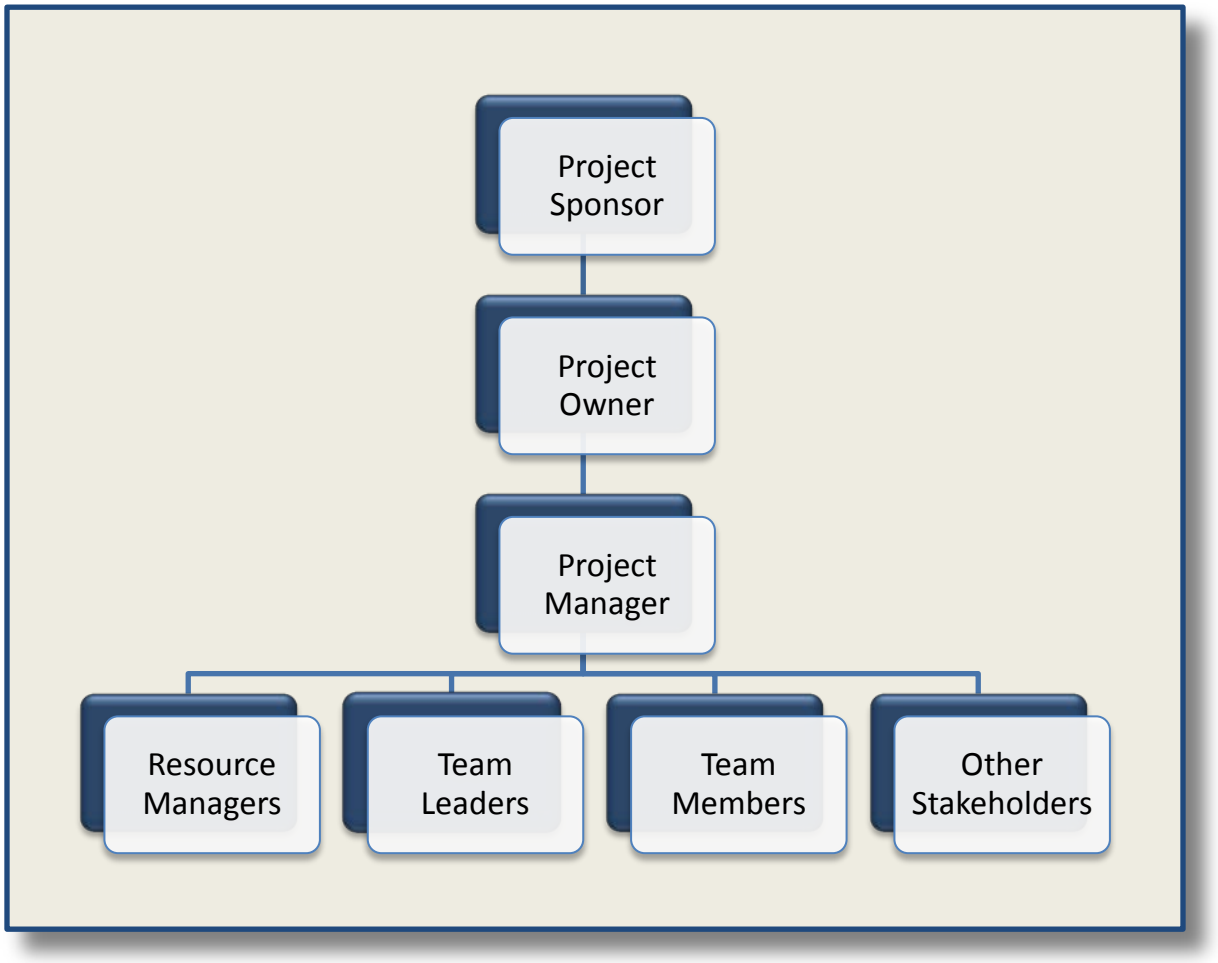
Roles and Responsibilities

It is important that the team establish roles early in the project to avoid any confusion down the road. The following are the key responsibilities for the different roles within the project. Review them, and make sure everybody in the project understands their roles. To better understand the organizational hierarchy of these roles, please refer to the "*Project Organization Chart*" section.

Project Sponsor	**Project Owner**
• Approves project charter, scope, and deliverables, and authorizes any necessary changes. • Authorizes money and resources. • Champions the project.	• Accountable to Project Sponsor for success of the project. • Communicates between Project Sponsor and Project Manager. • Recommends a Project Manager to the Sponsor and may assist in team selection. • Removes barriers and provides project support; is a resource for resolving issues. • Champions the project.
Project Manager	**Project Team Members**
• Assumes ownership and responsibility for the project schedule, budget, and scope. • Identifies resources and assigns team member roles. • Defines project requirements and monitors progress against the work plan. • Identifies and manages project risks. • Notifies Project Sponsor/Owner of progress, support needed, or barriers. • Maintains ongoing communication with the stakeholders. • Provides status reports to Project Sponsor/Owner and stakeholders.	• Assume ownership and accountability for assigned project activities and tasks. • Participate in the project initiation, planning, execution, and closure stages. • Identify and communicate problems, challenges, and issues to Project Manager. • Participate in problem solving. • Submit timely and accurate activity progress to Project Manager.
Resource Managers	**Team Leaders**
• Assign appropriate staff to a project and project tasks. • Authorize assigned work from a Project Manager to their section. • Recommend SMEs for a project.	• Assign appropriate District staff to a project team. • Recommend District SMEs for a project.

PROJECT ORGANIZATION CHART

The graphic below is the organizational hierarchy of a project. For a detailed overview of the responsibilities of these roles, please refer to the "*Roles and Responsibilities*" section. For suggestions about who should assume these roles for any given project type, please refer to the "*Candidates for Roles*" section.



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CANDIDATES FOR ROLES

Depending on what program your project falls under, the Project Manager, Owner, and Sponsor may be different than those for other projects. Please refer to the tables below *(and continuing onto the next page)* for suggestions on who should assume each role for your project. Each letter or group of letters corresponds to a specific Title, office, program, committee, etc. One individual who either holds that title or belongs to that office, program, committee, etc. would need to be assigned.

BR -HQ Bridge
CE -Chief Engineer
D -District
DE -District Engineer
DA -Division Administrator
GO -GARVEE Office
HQ -Various HQ Sections
LHTAC -LHTAC
LA -Local Agency
MPO -MPO
OHS -Office of Highway Safety
RCE -Resource Center Engineer
APM -Aeronautics Project Manager
TMAC -Transportation Management Area Committee
TP -Transportation Performance
UC -Urban Committee (MPOs)

Program	Project Sponsor	Project Owner	Project Manager
Pavement Preservation	DE	D	D
Pavement Restoration	DE	D	D
Bridge Preservation	BR	DE	D
Bridge Restoration	BR	DE	D
State Expansion	DE	D	D
Early Development	DE	D	D
Board Unallocated	Board	D	D
GARVEE	Board	D	GO or D
Systems Support	HQ	HQ	HQ
ADA Curb Ramp	TP or HQ	HQ or TP or LA	TP or LA
Safety - Statewide	OHS	DE or LHTAC	D or LHTAC
Safety – SAFETEA-LU Rail	RCE	DE or LA	D
Safety - State-Rail	RCE	DE or LA	D
Systems Planning	DE	D	D
CMAQ	TP or RCE	D or LA	D or LA
Highway Planning – Other Formula	UC or HQ	MPO or HQ	MPO or HQ
Safe Routes to School	TP	TP or D	TP or D
STP—Local Urban	UC	LA	D or MPO or LHTAC
STP—Transportation Management Area (TMA)	TMAC	D or LA	D or MPO or LHTAC

TPA – Transportation Management Area (TMA)	TMAC or TP or LHTAC	TP or LA or MPO or LHTAC	TP or LA or MPO or LHTAC
STP—Local Rural	LHTAC	LA	LHTAC or D
Bridge—Local	LHTAC	LA	LHTAC
Bridge—Off System	LHTAC	LA	LHTAC
Emergency Relief (ER)	CE	D or LA	D
Capital	TP	TP	TP
Operations	TP	TP	TP
New Airport Facility	DA	APM	APM
Airport Facility Maintenance	DA	APM	APM
Airport Planning	DA	APM	APM
Aviation Systems Planning	DA	APM	APM

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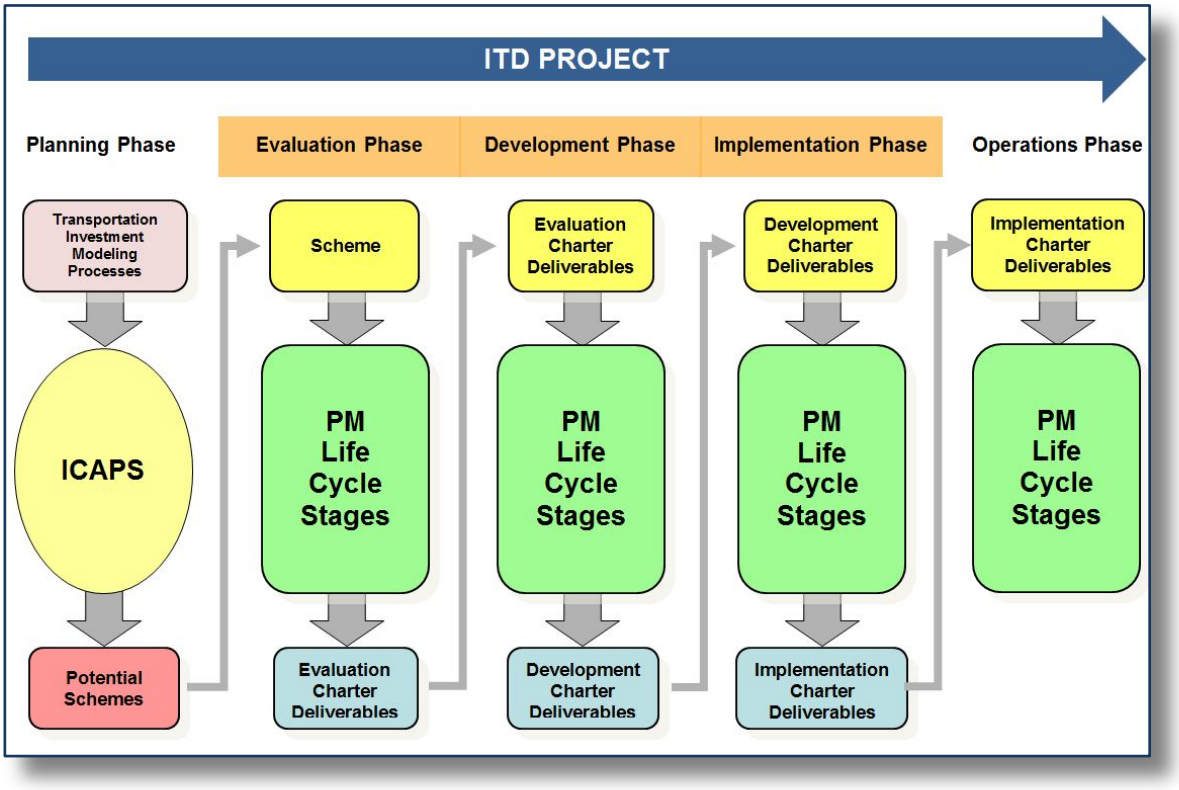
PROJECT LIFE CYCLE

Any project within the *Idaho Transportation Investment Program* (ITIP) will go through the ITD Project Life Cycle. This is a structured way to manage a project to avoid falling behind schedule and over budget. When projects follow this life cycle, they are easier to manage, easier to regulate, and easier to correct when there are errors or aspects that need to be changed or updated.

To see detailed information about what happens in each of these phases, and for further detail about the PM Life Cycle Stages, please go to the "*PM Life Cycle Stages*" section of this instruction manual.



To get a better understanding of how the project charter is used during the three main phases of the project life cycle (evaluation, development, and implementation) please refer to the "*Overview of Project Charter Phases*" section of this document.

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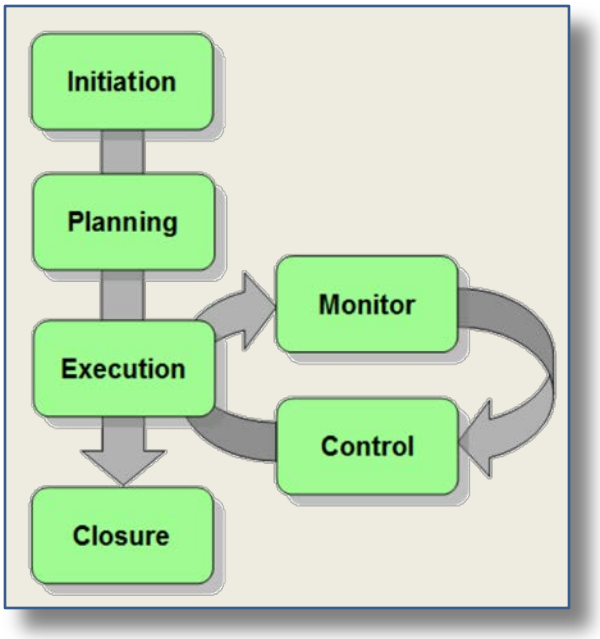
PM LIFE CYCLE STAGES

During each phase, the project goes through the project management (PM) life cycle stages. This part of project management involves four stages:

1. Initiation
2. Planning
3. Execution, monitor, and control
4. Closure

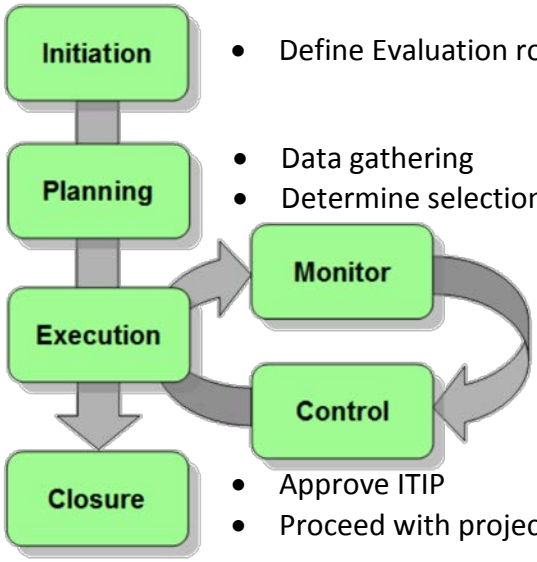
For further detail on what happens during each of these stages in any particular phase, please refer to the diagrams in the following pages.



Phase PM Life Cycle Stages:

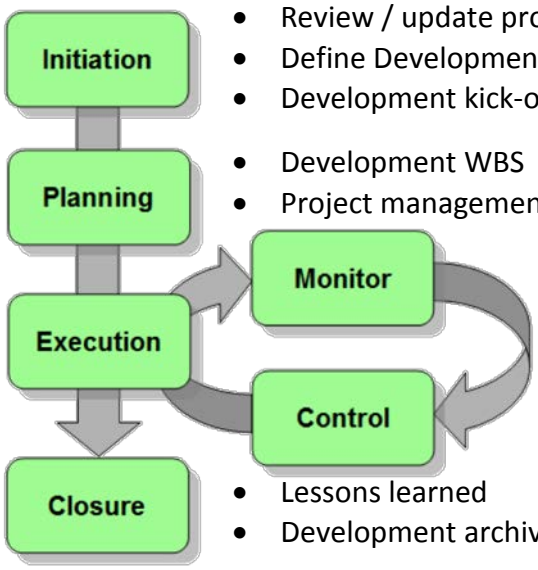
Evaluation Phase
Development Phase
Implementation Phase
Operations Phase

Evaluation Phase - PM Life Cycle Stages



- Define Evaluation roles & responsibilities
- Data gathering
- Determine selection criteria
- Project prioritization / ranking
- Develop project charter
- ITIP documentation
- Approve ITIP
- Proceed with project

Development Phase - PM Life Cycle Stages



- Review / update project charter
- Define Development roles & responsibilities
- Development kick-off meeting
- Development WBS
- Project management plans
- Development activities
- Change management / QC-QA
- Contract documents / awards
- Lessons learned
- Development archive

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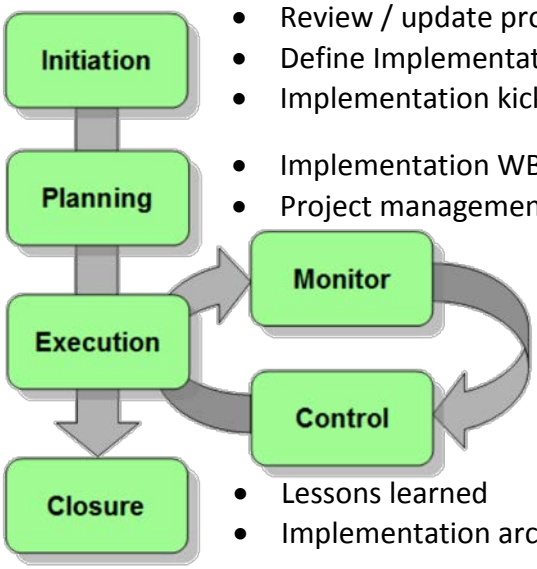
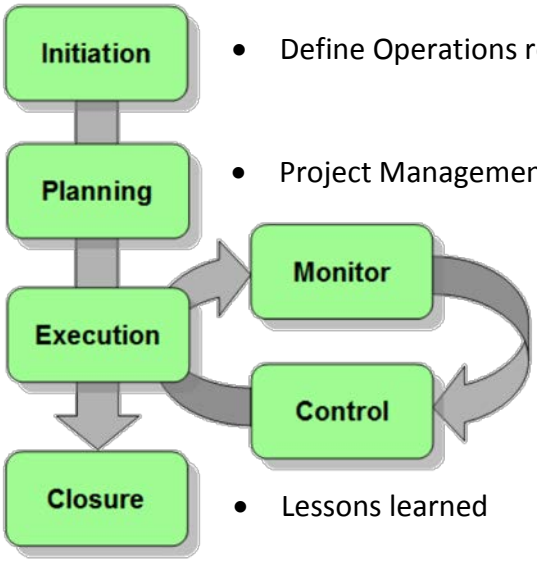
Implementation Phase - PM Life Cycle Stages



- Review / update project charter
- Define Implementation roles & responsibilities
- Implementation kick-off meeting
- Implementation WBS
- Project management plans
- Implementation activities
- Change management / QC-QA
- Substantial completion
- Lessons learned
- Implementation archive

Operations Phase PM - Life Cycle Stages



- Define Operations roles & responsibilities
- Project Management Plans
- Operations activities
- Change management / QC-QA
- Lessons learned

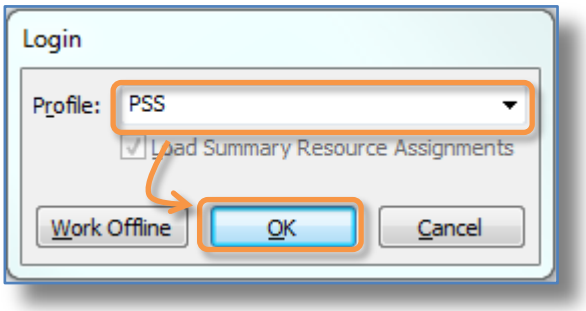
UNDERSTANDING THE SOFTWARE

This section goes over the software that is used when creating and editing a project charter. There are two main software applications that are used, **Microsoft Project Professional 2010 (MSP)** and **Project Web App (PWA)**, and they share a lot of functionality. Certain steps in creating a project charter will require you to use one program or the other, so it is important that you understand the differences.

DIFFERENCES BETWEEN MSP AND PWA

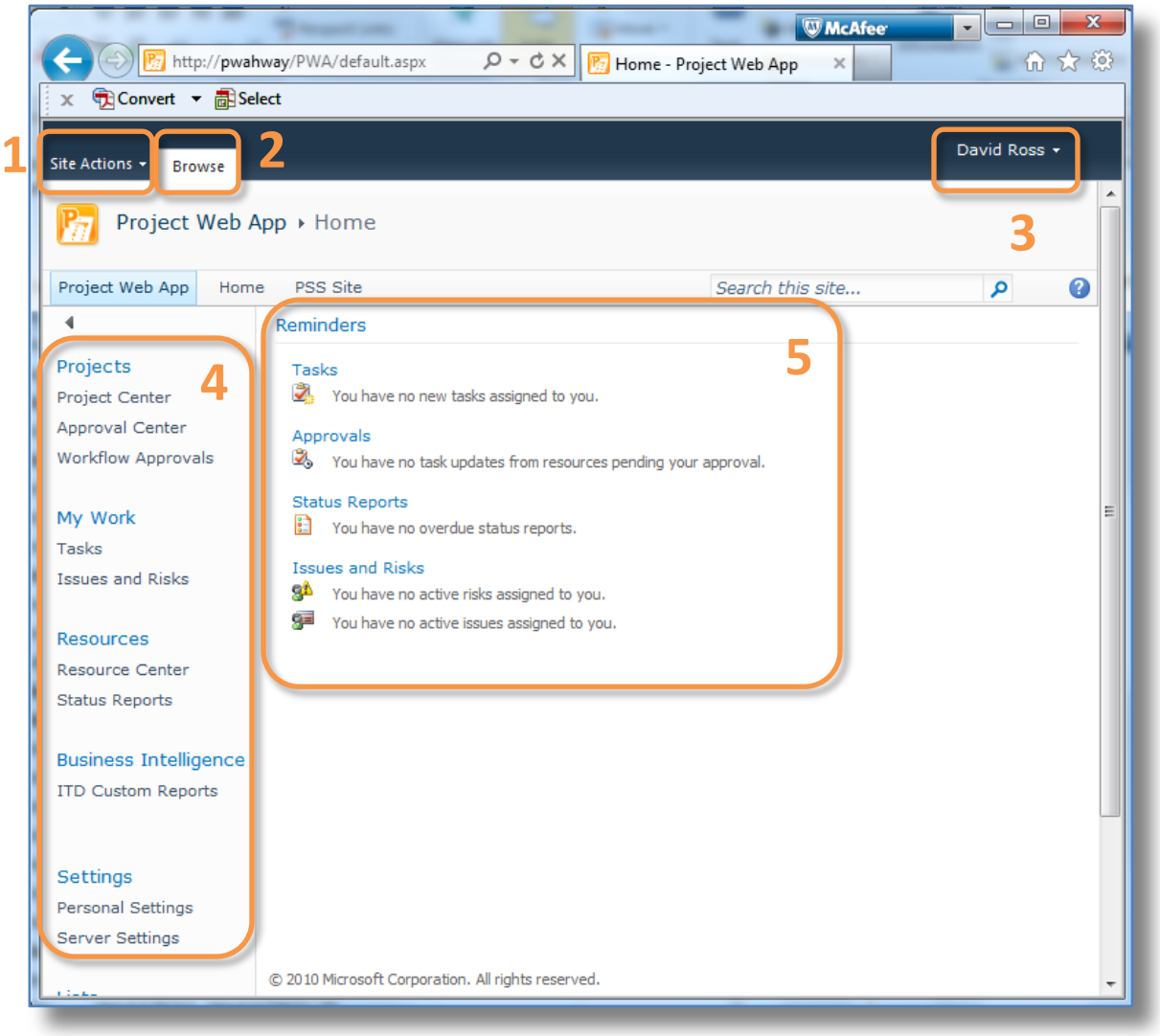
Microsoft Project Professional	Project Web App
• For Project Managers only • Full desktop program • View/Edit project schedules • Enter/Edit project information (i.e. custom fields) • Review/Update project progress • Use templates to create project schedules • Assign resources to project tasks • Baseline project • Use various viewing/reporting tools	• Accessible to all team members • Online tool • View/edit timeline and deliverables • Project reporting • Access shared workspaces for issues, risks, and documents • View task assignments • Manage issues and risks • Edit project development pages (PDPs) & submit workflow items

Note that when you set up MSP, you will need to link it to the PSS. This is done by utilizing the **Login** window when you first open MSP (below). Click the **drop-down** menu, select **PSS**, and then click **OK.**



PWA HOME-PAGE LAYOUT

The PWA is available online at *http://pwahway/PWA/default.aspx*



1. **Site Actions** – from here, you have the ability to access different tools for customizing the PWA and uploading documentation.
2. **Browse Menu** – this tab allows you to access any part of the PWA.
3. **Personal Menu** – allows you to change settings, switch users, log out, or customize a page you are on.
4. **Quick Launch** – this gives you access to various tools, reports, and pages.
5. **Reminders** – you will see any task, approval, status report, risk, or issue reminders in this section.

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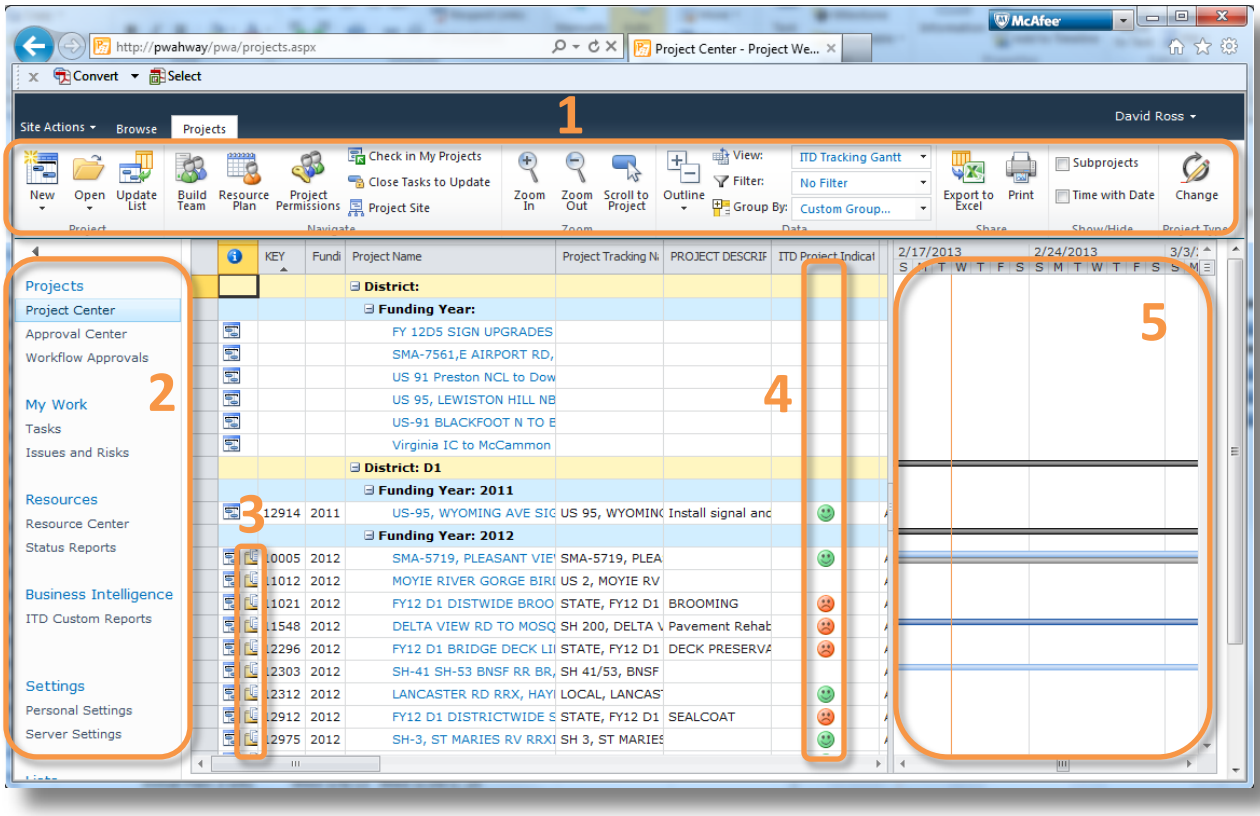
PWA PROJECT CENTER LAYOUT



1. **Ribbon interface** – allows you to perform various actions
2. **Quick launch** - this gives you access to various tools, reports, and pages.
3. **Icon hyperlinks to workspace content** – allows you to see all documents associated with a specific project.
4. **Graphic icon display and custom fields** – you can see quickly if a project is on schedule or not.
5. **Gantt chart** – a Gantt chart display for all projects.

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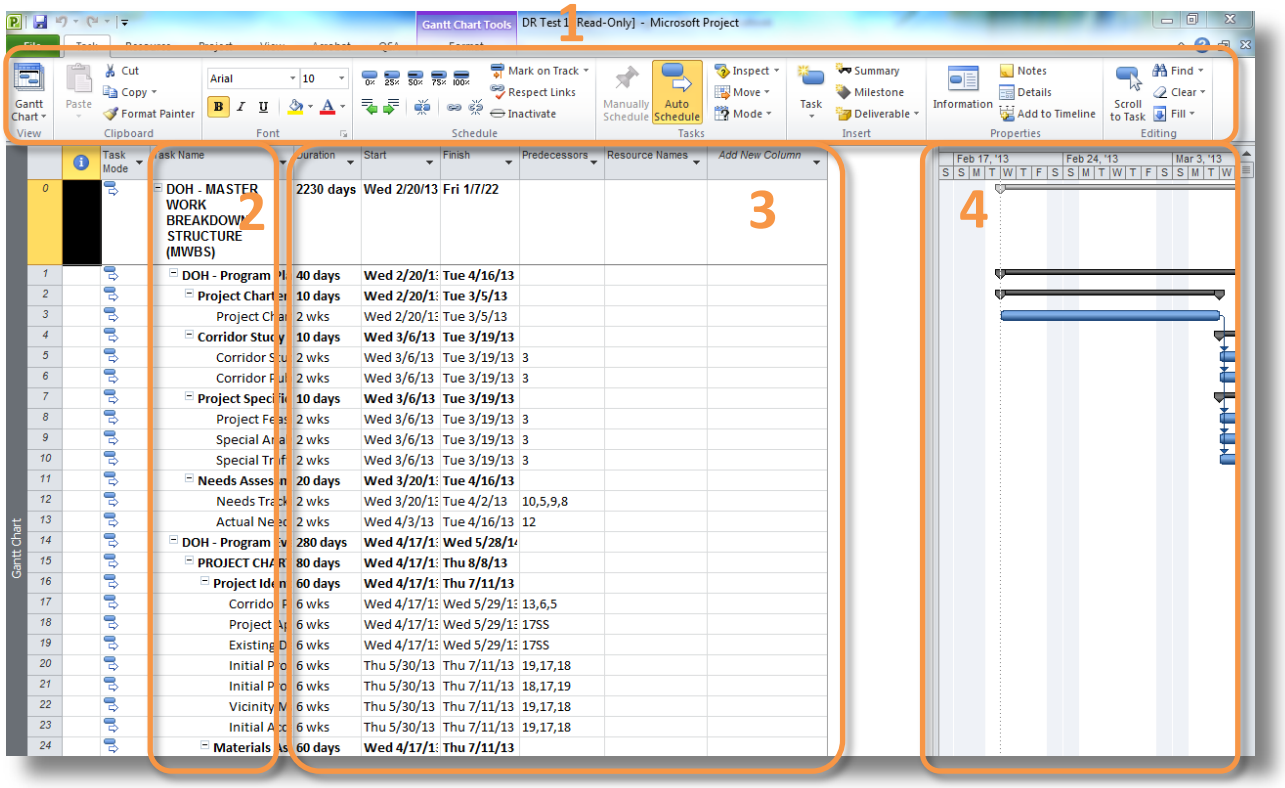
MICROSOFT PROJECT PROFESSIONAL 2010 LAYOUT



1. **Ribbon interface**—allows you to perform various actions.
2. **Task Name Column**—displays the task names or titles.
3. **Task Information Columns**—these columns contain information about the task duration, start date, finish date, predecessors, etc. You can add more task information columns if you need further detail.
4. **Gantt Chart View**—Microsoft Project Professional 2010 (MSP) will default so that the Gantt chart appears to the right of the task information. This gives you a visual timeline of the project's tasks.

PROJECT CHARTER PROCESS

PURPOSE OF USING A PROJECT CHARTER

Using a project charter helps improve delivery, increase accountability, and establish a baseline for the project. The project charter is a living document which:

Provides high-level project description
When you need to know something about the project in its current state, the project charter serves as a collection of easy-to-reference facts about the project. Rather than having to sift through all of the accompanying forms, reports, and documents to find what you need, you simply go to the section you need. Furthermore, if you need to compare the project in its current state to a previous state, you can pull that information up easily.

Defines project parameters
By having the scope, schedule, budget, and all other necessary information compiled in one document, it is much easier to understand what limitations you may face when working on a project. When you are defining project parameters, you are essentially setting a "fence" around the project's scope, schedule, and budget. Of course, these aspects of the project can be changed, but the project charter increases accountability.

States what will be delivered
It is important that expectations for the project be managed. The project charter serves as a universal document that can help the project team better understand what the goals and objectives of the project are. The project charter will help track goals and objectives based on budget, time constraints, risks, issues, and standards.

Documents changes
The key point of using a project charter is that it is a living document that evolves with the project. When there are major changes to the scope, schedule, and budget, those changes are recorded in the project charter; and, since the project charter is a live document, there will be a track record of all changes made. At any point, you can reference a previous state of the project charter to compare how it has changed.

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OVERVIEW OF PROJECT CHARTER PHASES

This is an overview of each of the three main phases of the project charter process. To better understand how these phases interact with one another, please refer to the "*Project Life Cycle*" section of this document.

EVALUATION PHASE

The **evaluation phase** is the initial programming of the project. The team enters this phase after the planning phase has concluded, and they propose the project to be included in the ITIP. In this phase, the team determines the high-level needs and resources of the project and develops the initial scope, schedule, and budget. At this phase of the project, the team needs to clearly define and assign the various roles of different members and make sure that each member understands their responsibilities within the team.

DEVELOPMENT PHASE

The **development phase** is when the team develops or designs the project. During the **development phase**, the team will make any necessary changes to the initial scope, schedule, and budget while creating detailed delivery and resource schedule. Upon completion of a detailed schedule, the Sponsor and Owner will need to approve the new plan, allowing the PM to baseline the schedule. Changes to the scope, schedule and budget can be managed through the *Charter Change Request process*. These changes will be documented in the project charter and PSS.

IMPLEMENTATION PHASE

The **implementation phase** is when construction begins and/or funds are expended. For DOH Infrastructure projects, the PM updates the project schedule based on the contractor's schedule. The PM will then update the schedule monthly based on planned contractor activities. Necessary changes to the scope, schedule, and budget can also be made during this phase using the *Construction change order process*. These changes will need to be documented in the project charter.

CONTENTS OF THE PROJECT CHARTER

A project charter has nine main sections. Each section may have individual subsections that make up the whole section. The Project Manager fills out these sections *using Project Detail Pages* in the PWA.

1. **Project Information**
   This section consists of the Key Number, Project Name, District, Route, Beginning Mile Post, Funding Year, Ending Mile Post, Program, Temporary Key Number, and Type of Project.

2. **Workflow Summary Information**
   This section shows what phase and stage the project charter is in. It also shows when the stage was submitted and the date it was approved.

3. **Exit Criteria**
   This section shows whether or not Exit Criteria has been met for a specific phase.

4. **Scope & Strategic Objectives**
   This section consists of the Project Objective Statement, Strategic Goals, and Scope of Work.

5. **Environmental Considerations**
   This section consists of the primary and secondary needs of the project, the Anticipated Major Deliverables, and the Environmental Narrative.

6. **Design Standards**
   This section consists of Crash History, Design Data, Project Standards, Additional Design Data, and Design Standards.

7. **Funding and Cost Summary**
   Shows the fiscal year and budget amount for each phase.

8. **Resource Plan & Constraints**
   This section consists of the Project Constraints and Resource Plan.

9. **True Minimum Milestones**
   This section shows the True Minimum Milestones (TMM) for the current phase of the project charter. It also includes start and finish dates, actual duration, and baseline start and finish dates for each TMM.

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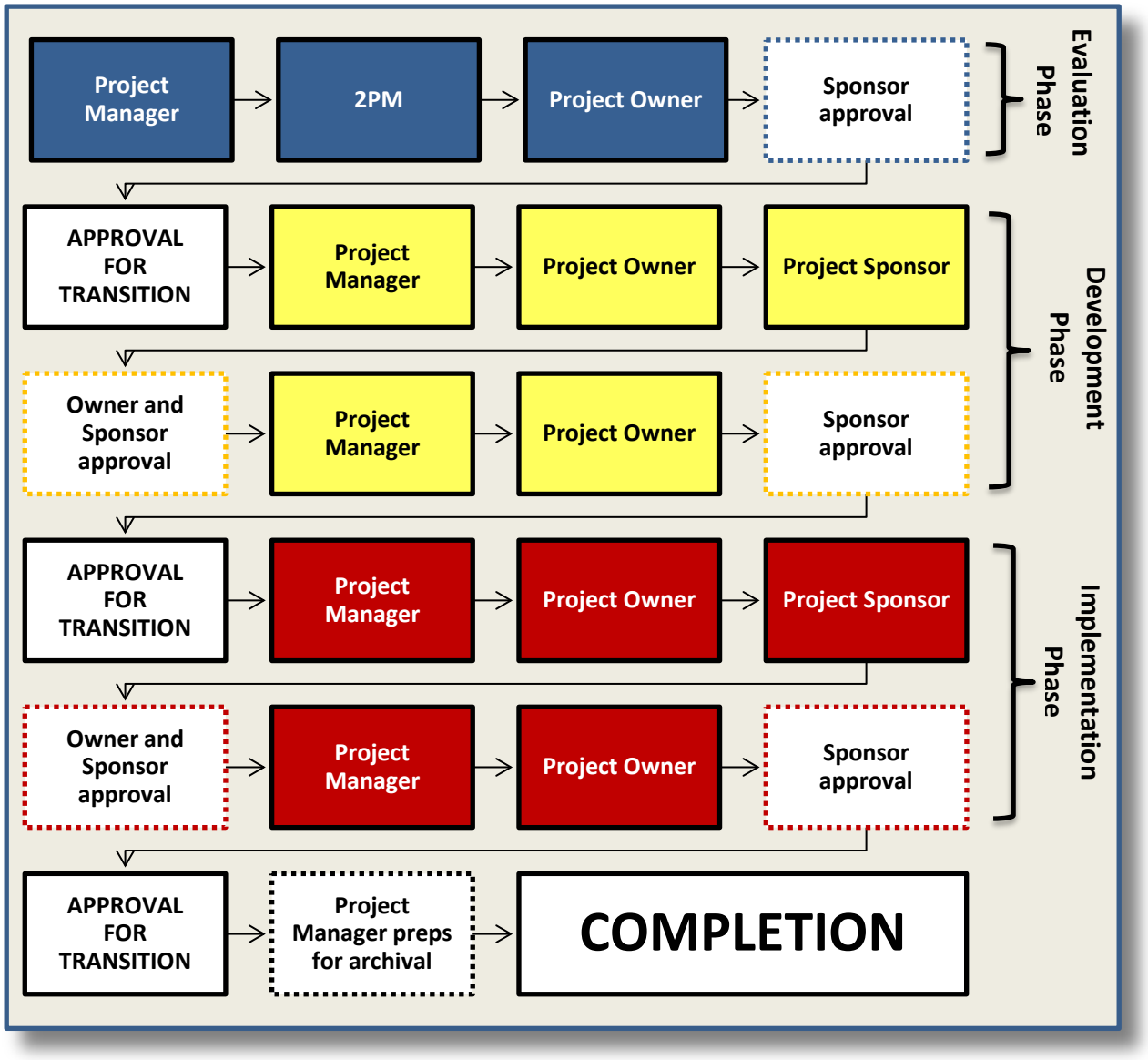
PROJECT CHARTER FLOWCHART

Different people within the project team play different roles in the process of creating, approving, and updating a project charter. For more details on this process and the workflow, please refer to the graphic below and the following section, "*Project Charter Steps*."



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PROJECT CHARTER STEPS

This section covers the three main phases of the project charter process (the *Evaluation Phase*, the *Development Phase*, and the *Implementation Phase*), as well as the last phase of the process, the *Closeout Phase*. This section also chronologically lays out the steps that each member needs to take in the three phases.

EVALUATION PHASE

Project Manager:

1. *Creates Charter from PWA using appropriate template or from a project schedule* in Microsoft Project Professional based on DOH master template.
2. *If starting from a schedule in Project Pro, update Enterprise Project Type (EPT)*.
3. *Fills out Evaluation Phase information*, including *stakeholder list* in PWA workspace.
4. Completes or defines high-level schedule & *runs Quantum Schedule Auditor (QSA)* in Microsoft Project Professional.
5. *Enters Temporary Key # and date obtained* in charter PDP.
6. *Submits charter to 2PM* for approval.

2PM:

7. Validates Temporary Key #.
8. *Runs compliance checks using QSA*.
9. *Approves charter*.
10. Submits charter to Project Owner for approval.

Project Owner:

11. Reviews Evaluation Phase charter.
12. Following ITIP approval by the Idaho Transportation Board, *approves charter*.
13. Submits charter to Project Sponsor for approval.

Project Sponsor:

14. Reviews Evaluation Phase charter.
15. *Approves* charter.

Upon approval:

- System takes a snapshot of all current charter information.
- System baselines obligated funding amount from Project Tracking.
- Office of Transportation Investment (OTI) issues Key # based on Temporary Key #, following Board approval.
- System pulls funding information onto the Funding & Cost Summary PDP.
- System captures TMM level data (baselines and actual).
- Phase transitions to "*Development.*"

DEVELOPMENT PHASE (NOTE: ONLY FOR INFRASTRUCTURE PROJECTS)

Project Manager:

1. Reviews and updates charter for Development Phase.
2. Refines schedule and *runs QSA*.
3. *(Optional)* Runs multiple custom resource reports reflected in Project Detail Pages (PDPs) to use during negotiations with Resource Manager to determine resources.
4. Publishes updated schedule.
5. When schedule is completed, submits charter to Project Owner for baseline approval.

Project Owner:

6. Reviews Development Phase charter and schedule.
7. Reviews Schedule Approval Report.
8. *Approves* charter.
9. Submits charter to Project Sponsor for approval.

Project Sponsor:

10. Reviews Development Phase charter and schedule.
11. Reviews Schedule Approval Report.
12. *Approves* or suggests changes.
13. If approved, notifies Project Manager to baseline schedule.

Project Manager:

14. *Baselines the schedule* once owner and sponsor approve schedule (January 1).
15. Manages project.
16. Enters PS&E package Delivered Date and Contract Award Date.
17. Submits charter to Project Owner for approval.

Project Owner:

18. Reviews Development Phase charter.
19. *Approves* charter.
20. Submits charter to Project Sponsor for approval.

Project Sponsor:

21. Reviews Development Phase charter.
22. *Approves* charter.

Upon approval:

- System takes a snapshot of all current charter information.
- System pulls funding information onto the Funding & Cost Summary PDP.
- System captures TMM level data (baselines and actual).
- Phase transitions to "*Implementation.*"

IMPLEMENTATION PHASE

Project Manager:

1. Reviews and updates charter for Implementation Phase.
2. Refines schedule based on contractor's schedule and *runs QSA*.
3. *(Optional)* Runs multiple custom reports reflected in PDPs.
4. When schedule is completed, submits charter to Project Owner for approval.

Project Owner:

5. Reviews Implementation Phase charter and schedule.
6. Reviews Schedule Approval Report.
7. *Approve*s charter.
8. Submits charter to Project Sponsor for approval.

Project Sponsor:

9. Reviews Implementation Phase charter and schedule.
10. Reviews Schedule Approval Report.
11. *Approves* or suggests changes.
12. If approved, notifies the Project Manager to baseline schedule.

Project Manager:

13. Baselines schedule.
14. Manages project.
15. Enters Final Voucher Issues.
16. Submits charter to Project Owner for approval.

Project Owner:

17. Reviews Implementation Phase charter.
18. *Approves* charter.
19. Submits charter to Project Sponsor for approval.

Project Sponsor:

20. Reviews Implementation Phase charter.
21. *Approves* charter.

Upon approval:

- System takes a snapshot of all current charter information.
- System pulls funding information onto the Funding & Cost Summary PDP.
- System captures TMM level data (baselines and actual).
- Phase transitions to "*Closeout.*"

CLOSEOUT PHASE

Project Manager:

1. *Sets Remaining Duration to 0 (zero)*.
   Note: Simply marking tasks as 100% complete will just add Remaining Duration to Actual Duration.
2. *Updates necessary Enterprise Custom Fields*
   a. Project Status = Archive
3. *Sets the Publish flag to NO* for all tasks, and then publishes the schedule.
4. Closes Tasks to update the Project Summary Task (Task 0).
5. Publishes the schedule.
6. Updates the Project Site with all the artifacts.
7. Saves all documents off to Project Wise.

CREATING AND UPDATING PROJECTS

This section outlines how to perform specific tasks that are required when working with the Project Scheduling System (PSS). For information on when to perform these functions, please refer to the "*Project Charter Steps*" section.

Main Functions

Project Detail Page Functions

Project Site Lists

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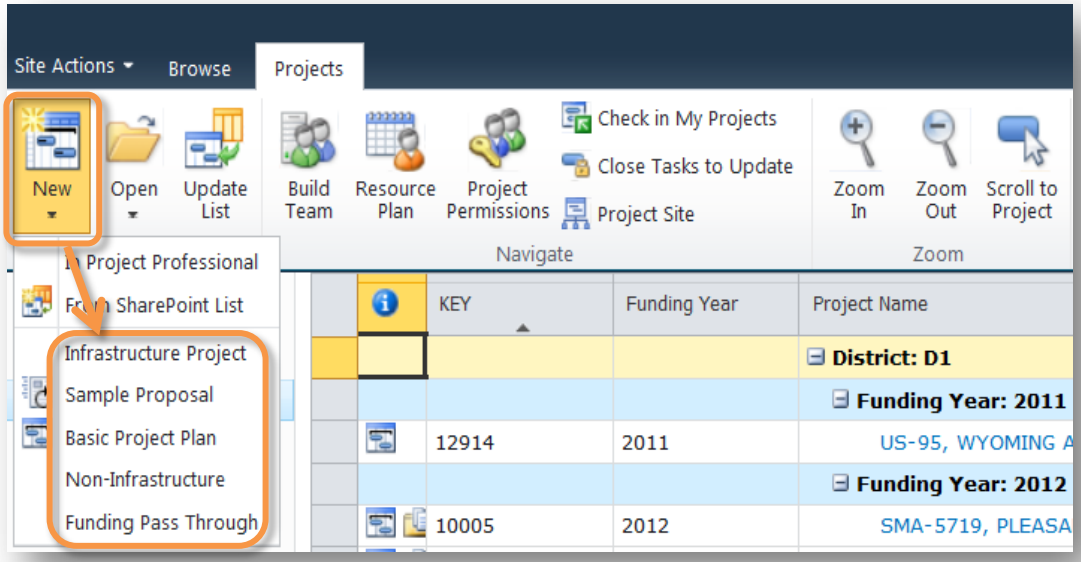
MAIN FUNCTIONS

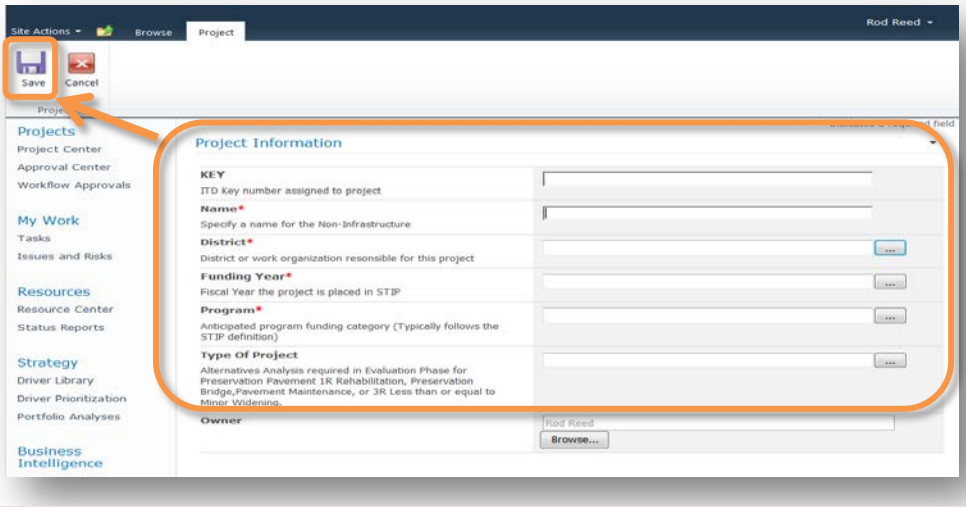
STARTING A NEW PROJECT FROM PWA

This is accomplished in the Evaluation Phase. You can start in Project Web Application (PWA) at the Project Center and select the appropriate template.

1. **From the New button in the Ribbon.** Click **Arrow** under **New.** Select the Project Type you want from the list.



2. **Fill in basic project information** in the following screen. Note red astrisks * for required fields (4). Press **Save** button to create the project.



CAUTION: You cannot use a project name containing any of the following special characters: **.(period) \ " / : ; | ? ' < > * # ~ % & { } +**

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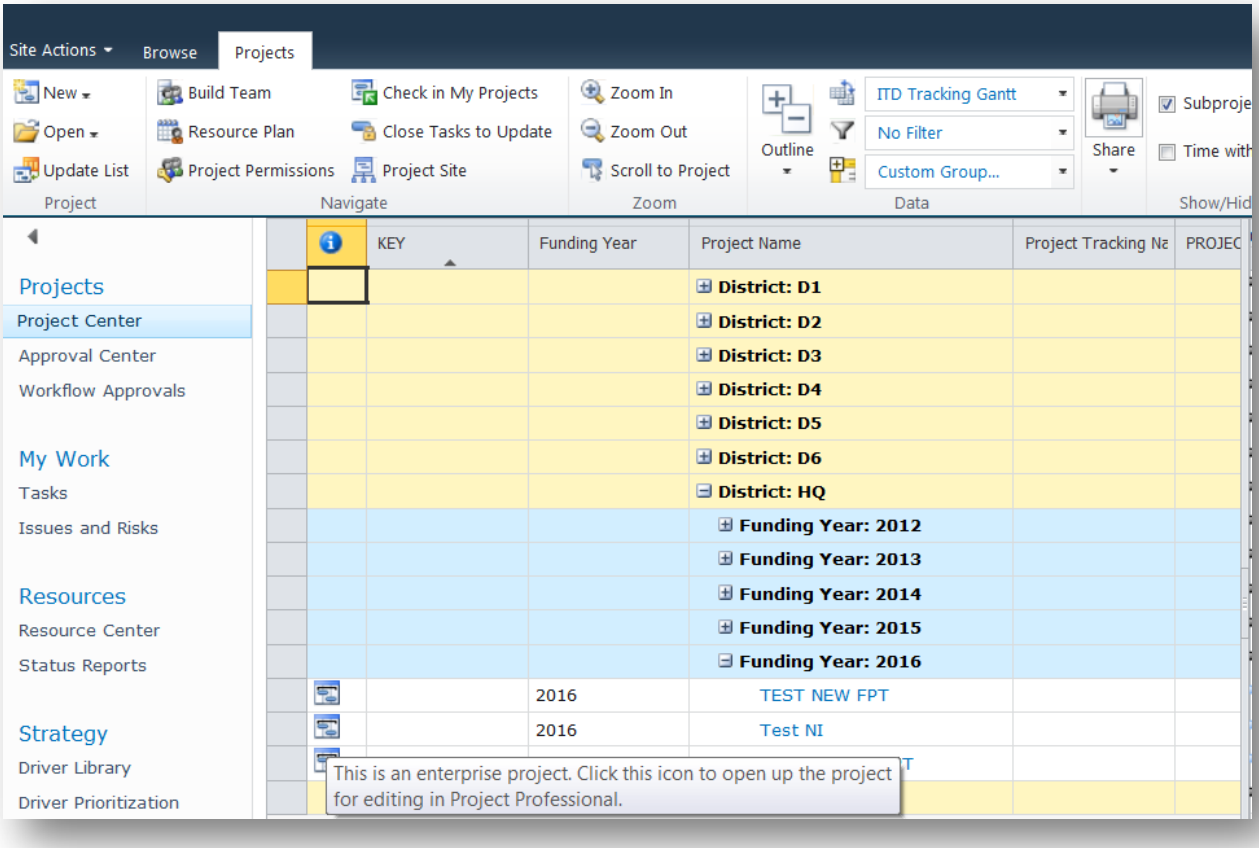
3. **Open the Project in Project Professional**. **Click** on the  icon to open the project in Project Professional. This matches the WBS codes for the project tasks to the project template. After the schedule is open and the WBS codes have been updated, **Publish** and **Check In** the project and close Project Professional.



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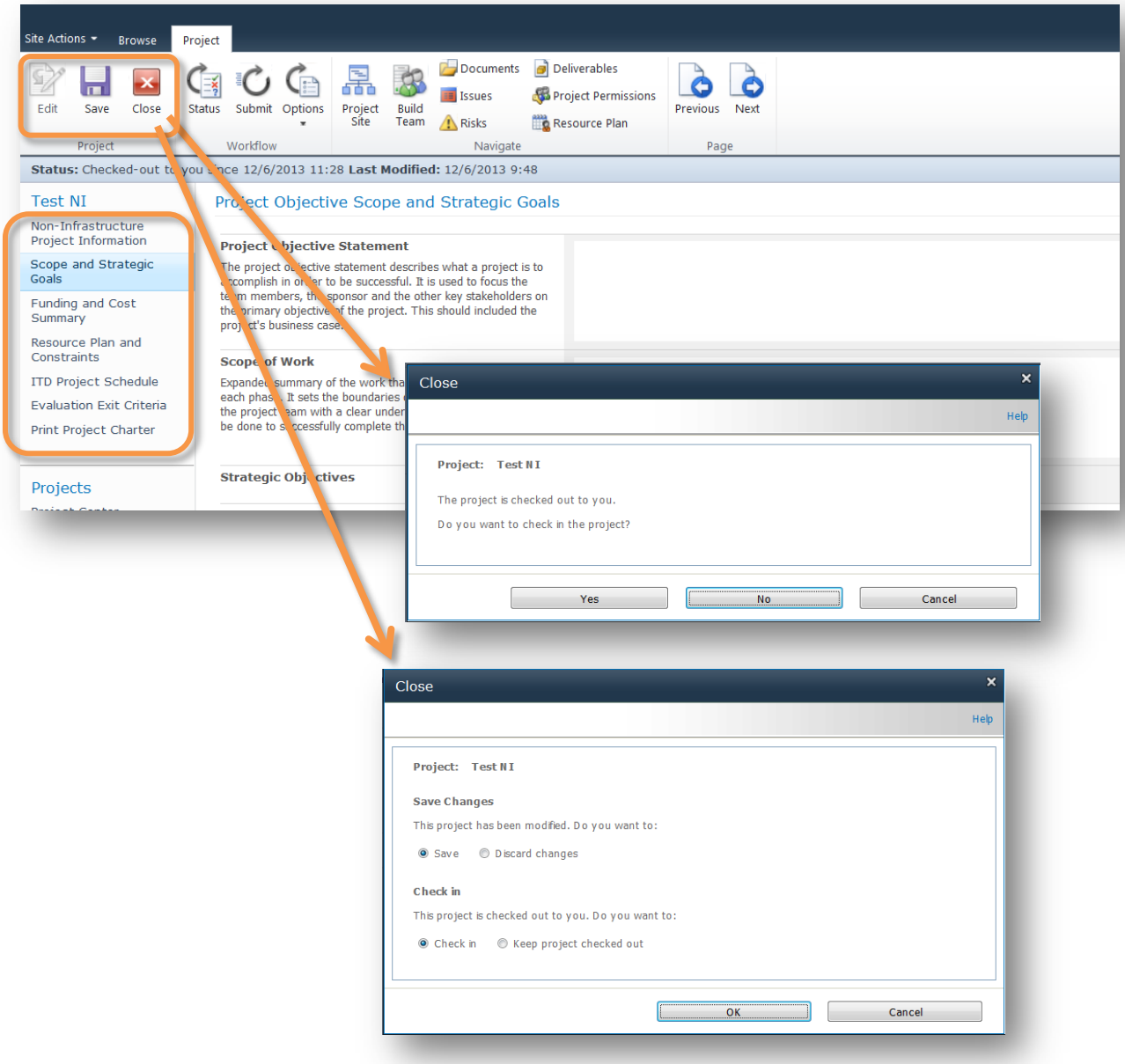
4. **Update project information.** From the Project Center view in PWA, Click **Project Name** to open the project. Press **Edit** to edit the remaining Project Detail Pages. You must **Save** between each page of information. When you have completed editing, press the **Close** button and accept the prompt to save and check in the project.



5. **Modify Schedule using PWA.** Although you can edit the project through PWA, you will find the tools to be basic and do not lend them to easily edit the schedule if you have much detail to add.

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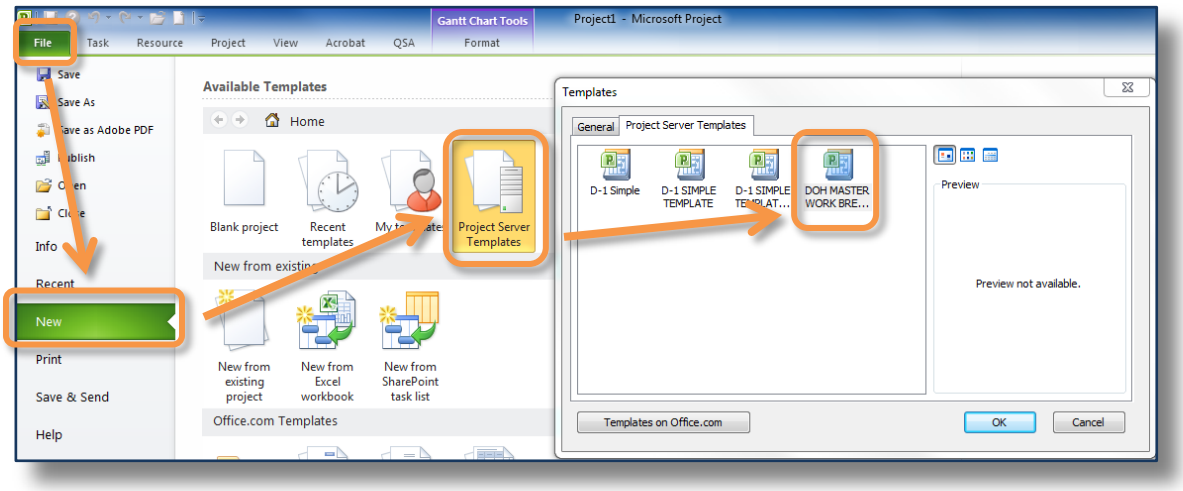
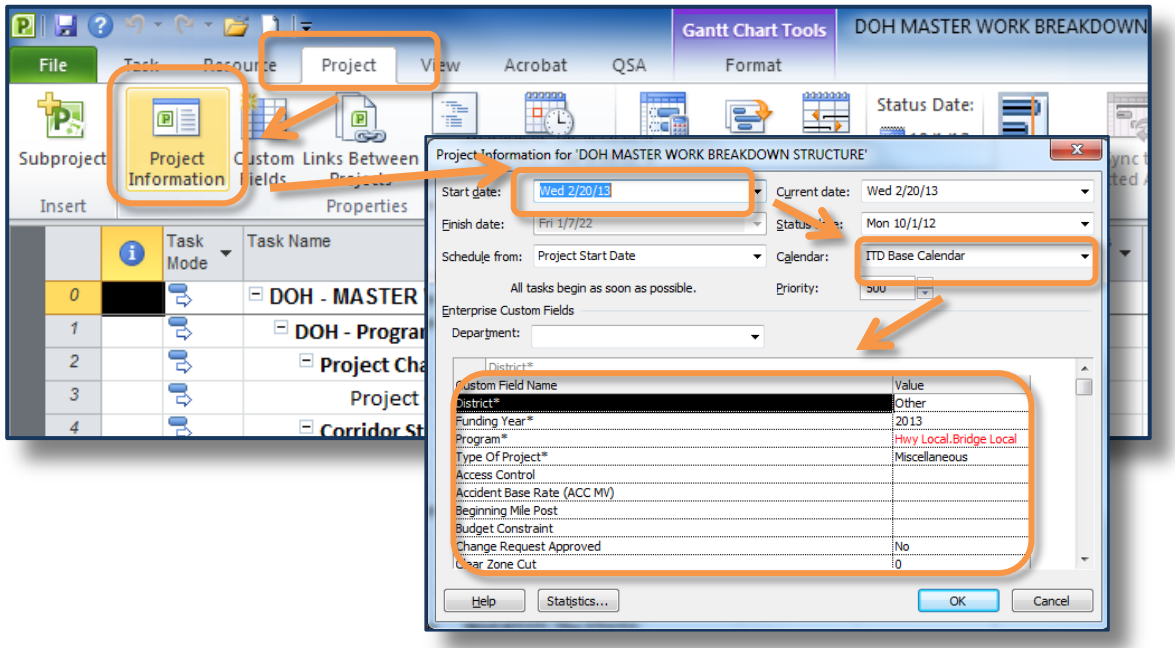
STARTING A NEW PROJECT FROM PROJECT PROFESSIONAL

This is done in the Evaluation Phase. You can start in PWA at the Project Center and select the appropriate template; however, when you need to modify the Enterprise Project Type (EPT) of an existing project to take advantage of workflow, use the Project Web App (PWA).

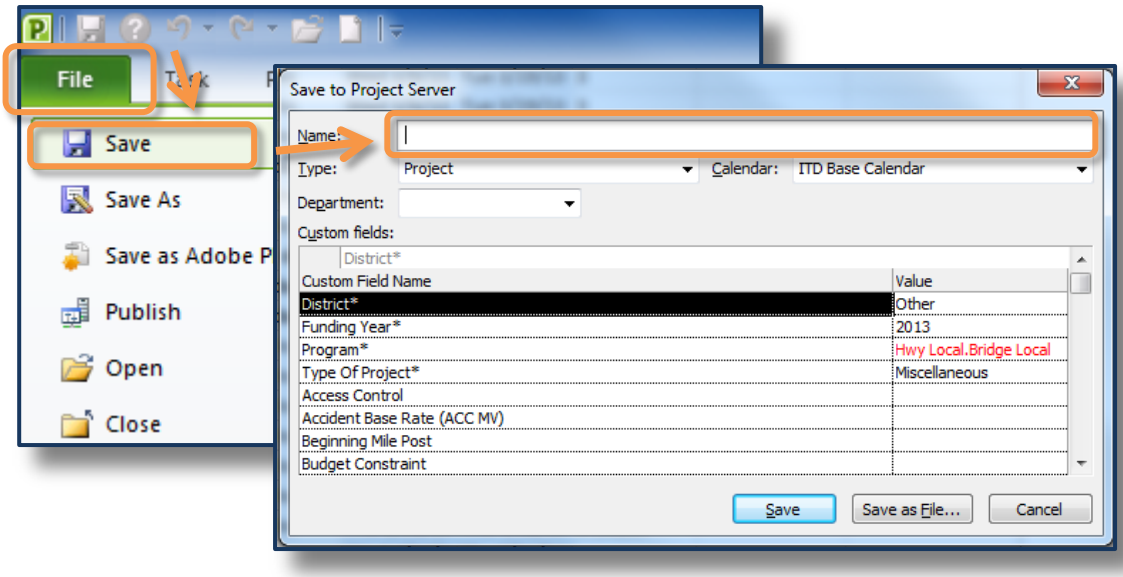
6. **Create a new project file.** Click **File** tab→**New**. Select the **DOH MASTER WORK BREAKDOWN STRUCTURE** template from **Project Server Templates**.



7. **Update project information.** Click **Project** tab→**Project Information**, and then update the **Start date, Calendar**, and **custom fields**.

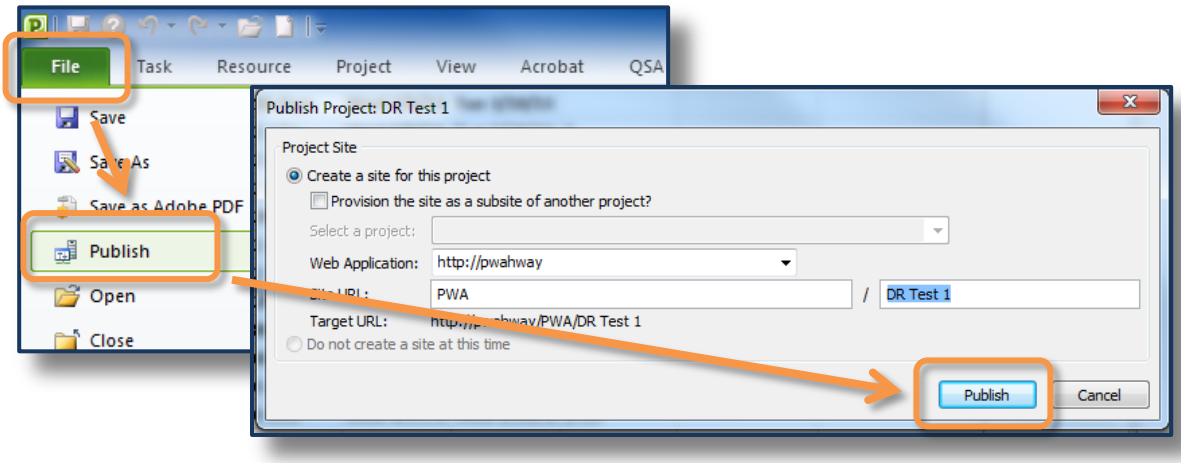


8. **Save the project file to the PSS Server.** Click **File** tab→**Save**. In the **Name field**, type the project name.



CAUTION: You cannot use a project name containing any of the following special characters: **.(period) \ " / : ; | ? ' < > * # ~ % & { } +**

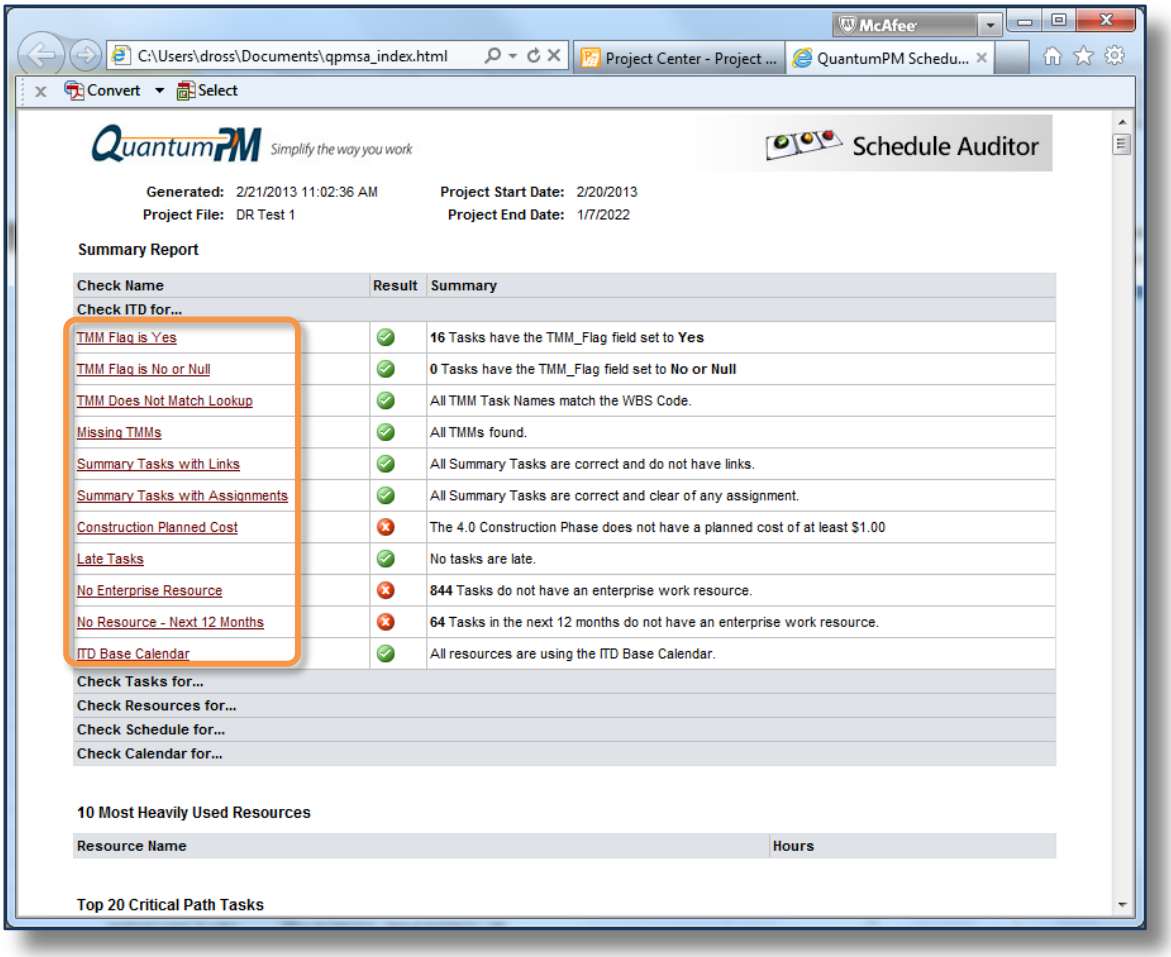
9. **Publish the project file to the PSS Server.** Click **File** tab→**Publish**.



NOTE: A Project Site will be created and opened in your browser automatically. QuantumPM Schedule Auditor (QSA) will run automatically.

10. **Review the QSA report**. This report will show up in your browser after the QSA runs automatically. Any check that is marked with a red will need to be corrected

eventually. If you would like to read further into any of the checks, simply **click the titles** of those specific checks.



NOTE: It is normal for the QSA to come up with errors that need to be corrected the first time it runs on a new project. Although these will need to be resolved eventually, you don't need to worry about fixing them right away. For instance, at this point in the Evaluation Phase, you haven't assigned resources yet, and you may have not documented any planned costs for the project. These issues will be covered later in this manual.

11. **Update Enterprise Project Type (EPT)**. *From the Project Web App*, go to the **Project Center**. Select the project you are working on by clicking next to it (on the left). Next,

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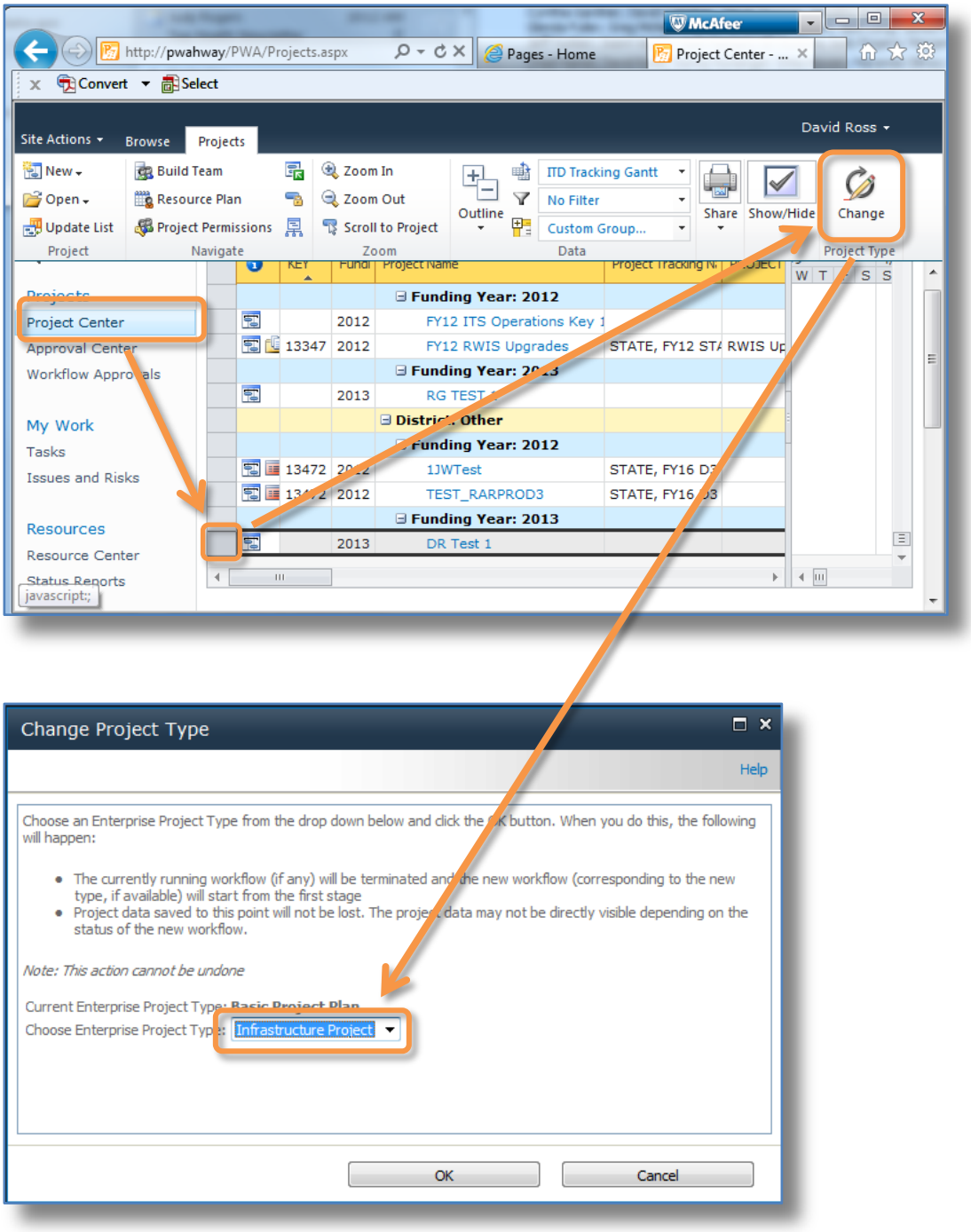
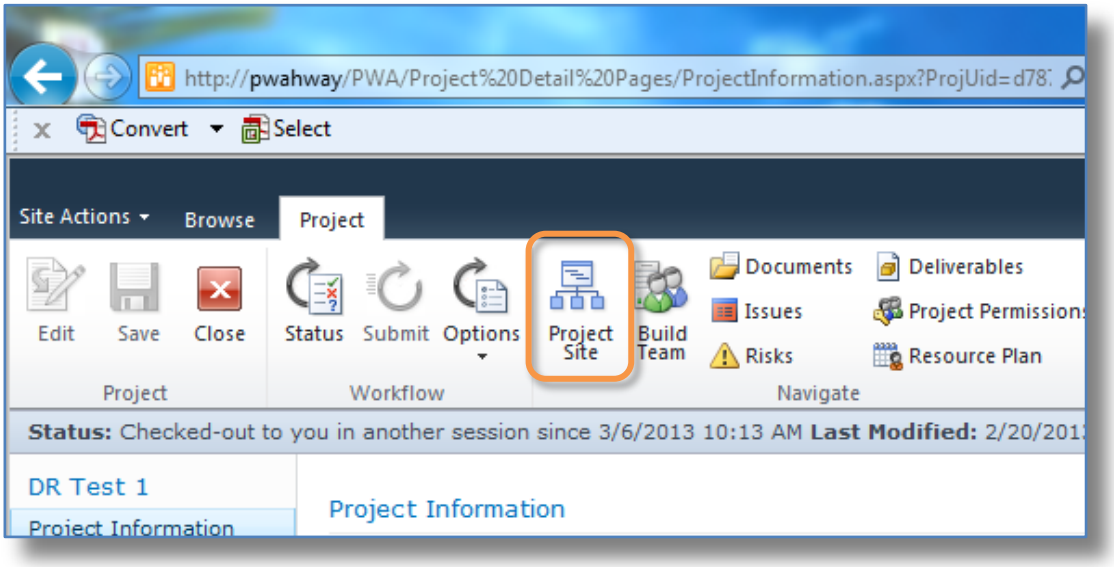
click the **Change Project Type** button in the ribbon and change the EPT to the correct project type (i.e. Infrastructure).



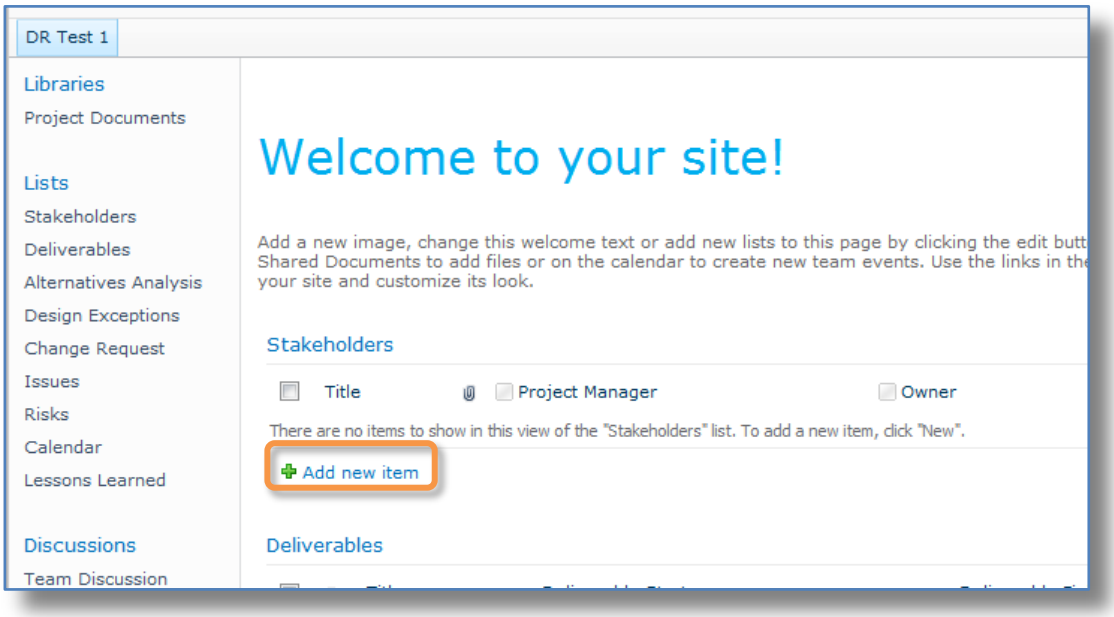
CREATING A STAKEHOLDER LIST

After you have created a project, you need to create a stakeholder list using the Project Web App (PWA) to access the Project Site. The roles and responsibilities for various stakeholders can be found in the "*Roles and Responsibilities*" section. Refer to the "*Project Organization Chart*" section to see an example organization chart for how these roles should interact.

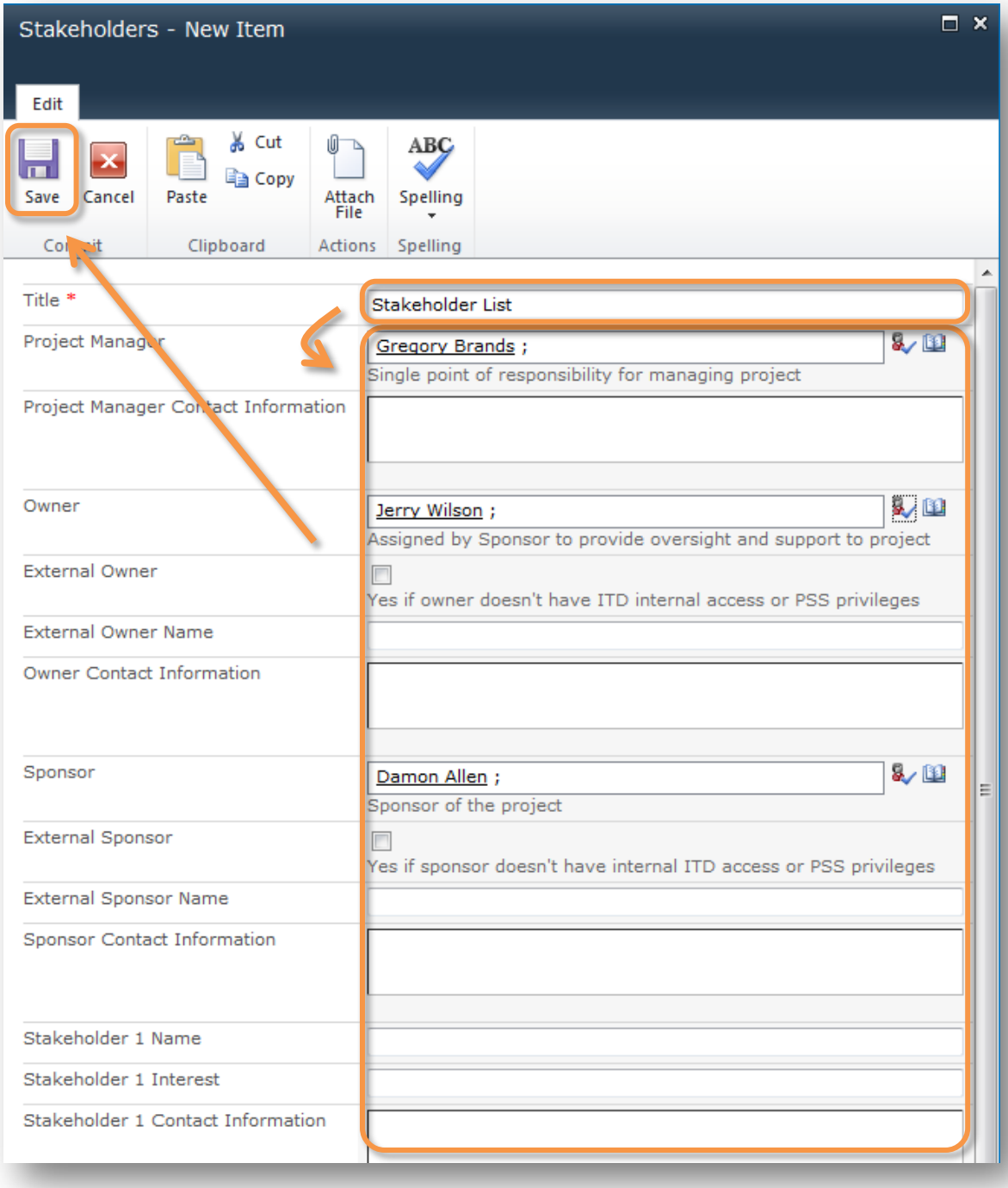
1. **Go to the Project Site.** With your project open in *the PWA*, click **Project Site**.



2. **Pull up the Stakeholders dialogue box.** Under **Stakeholders,** click **Add new item**.



3. **Create your stakeholder list.** In the **Title** field, enter a short, simple title for your stakeholder list. Then, using the **fields provided below**, add your individual stakeholders. Be sure to include contact information for each stakeholder so they can be reached by other stakeholders and team members. When all the stakeholders are updated, click **Save.**



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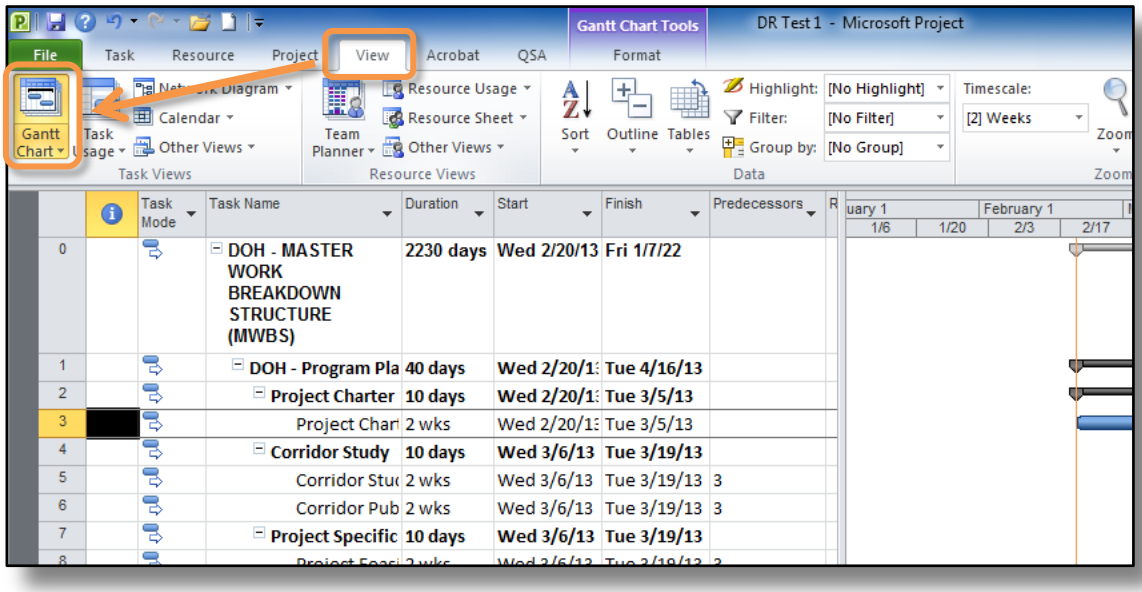
Updating Work Breakdown Structure

You need to modify your work breakdown structure (WBS) to meet the requirements of your project as well as develop and refine the schedule according to the phase you are in. Follow best practices when modifying a schedule built off an enterprise template. Pay close attention to task relationships and stay away from task constraints as much as possible. You should allow the task relationships and durations of tasks to set the start and finish dates rather than manually entering them.

All of the following steps will be performed using Microsoft Project Professional 2010 (MSP).

1. **Modify view.** Click **View** to find a view suitable for updating your WBS. The **Gantt Chart** is a good starting point.

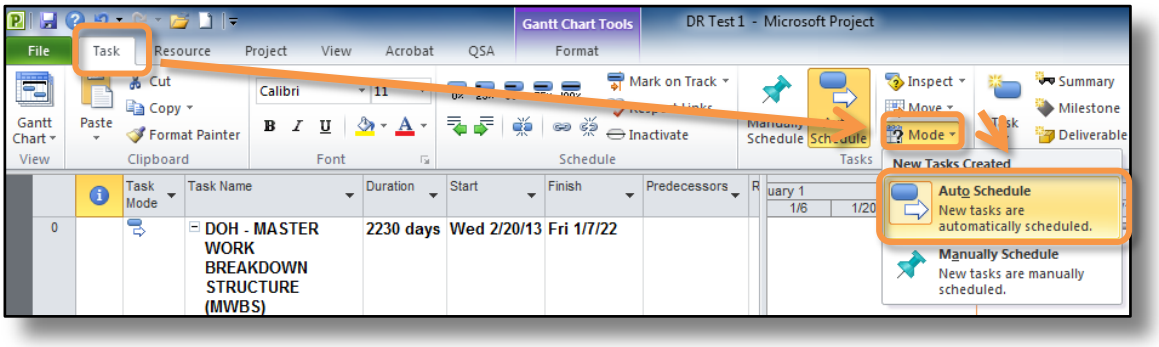


NOTE: When removing/deleting tasks from project schedules created from templates, ensure any pre-defined dependencies contributing to the project's finish date are not compromised by moving the necessary link(s) (predecessor tasks) to the appropriate remaining task(s) (successor tasks).

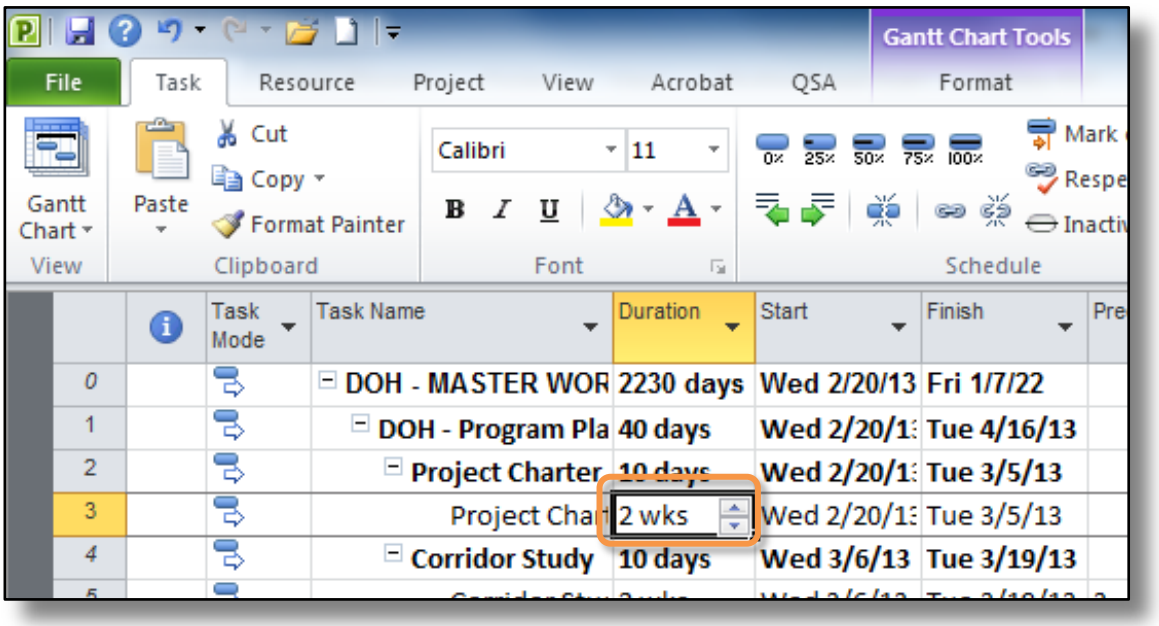
Instead of deleting tasks, you can simply inactivate them by right-clicking and then clicking "inactivate tasks."

CAUTION: Do not delete predefined milestones in templates, such as "Concept Approval." These are identified with a "Z" in the WBS code of the milestones and are **extremely important** for reporting purposes.

2. **Make sure tasks are set up to be automatically scheduled.** Using the DOH MASTER WORK BREAKDOWN STRUCTURE template should make tasks default to automatic scheduling. However, in case the tasks in your project aren't automatically scheduled default, follow these steps to make them automatically scheduled: Click the **Task** tab. In the **Tasks** group, click the **Mode** drop-down menu, and then click **Auto Schedule**.



3. **Enter durations.** From the Gantt Chart view, click the **Duration** field for the task you would like to change, and then enter duration. Enter the duration as a number. For example, type 4d to indicate 4 days. To specify a milestone without duration, type **0d**. To indicate that a duration is an estimate, add a question mark. For example, type **6d?**



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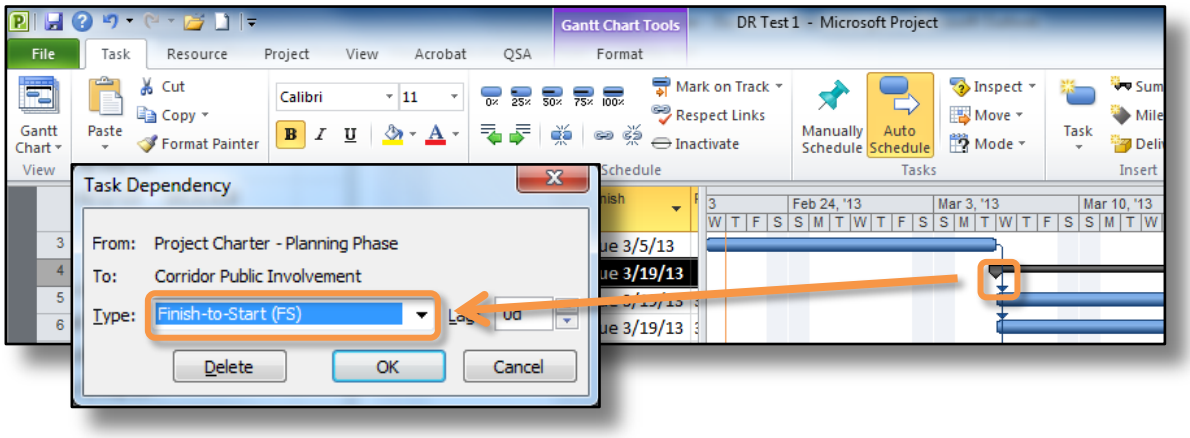
NOTE: Durations can be entered in days, weeks, or months.

Don't enter start and finish dates for tasks. Instead, enter duration and let MSP automatically set these dates. This allows the schedule to live dynamically and adjust remaining start/finish dates as tasks are being completed.

12. **Link tasks to show relationships.** From the Gantt Chart view**,** select the tasks that you want to link, and then click the **Link Tasks** button in the **Tasks** group, which is under the **Tasks** tab. To change the default finish-to-start dependency type, double-click the line between the tasks that you want to change, and then select a task link from the **Type** list.

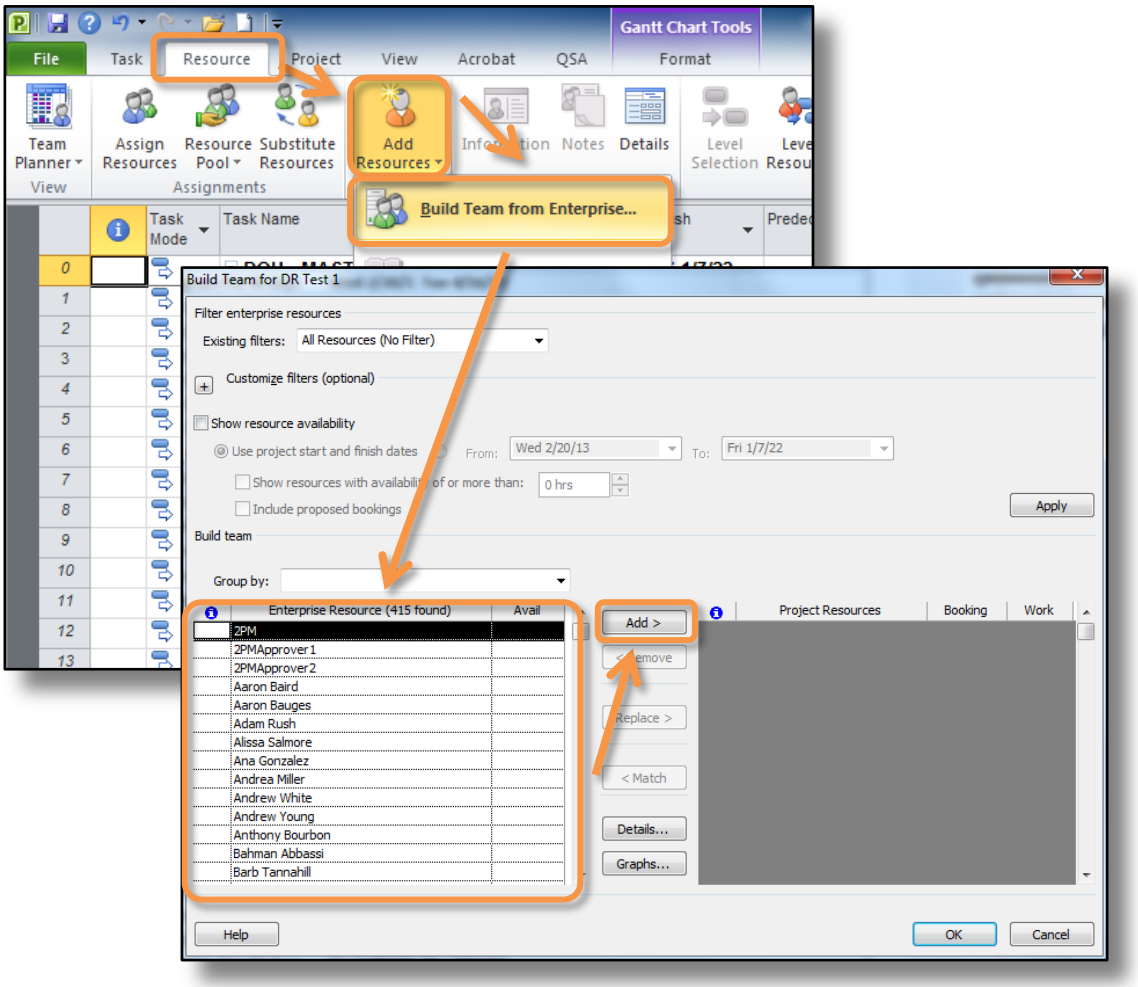
    a. **Finish-to-Start**: "Task B" can start when "Task A" finishes (**Most Commonly Used**)
    b. **Finish-to-Finish**: "Task B" can finish when "Task A" finishes
    c. **Start-to-Start**: "Task B" can start when "Task A" starts
    d. **Start-to-Finish**: "Task B" can finish when "Task A" starts (**Rarely Used**)



ASSIGNING RESOURCES

Assignments are the associations between specific tasks and the resources needed to complete them. Make these assignments using Microsoft Project Professional 2010 (MSP). You can only assign one resource to a task. Be sure to communicate with Resource Managers to ensure the right resources are assigned to correct tasks.

1. **Add resources to your project.** You must add resources from the enterprise resource pool. Click the **Resource** tab, and then click **Add Resources**. Then select **Build Team from Enterprise…** From the Build Team window, select the Enterprise Resources you want to add to the project, then click **Add >**.

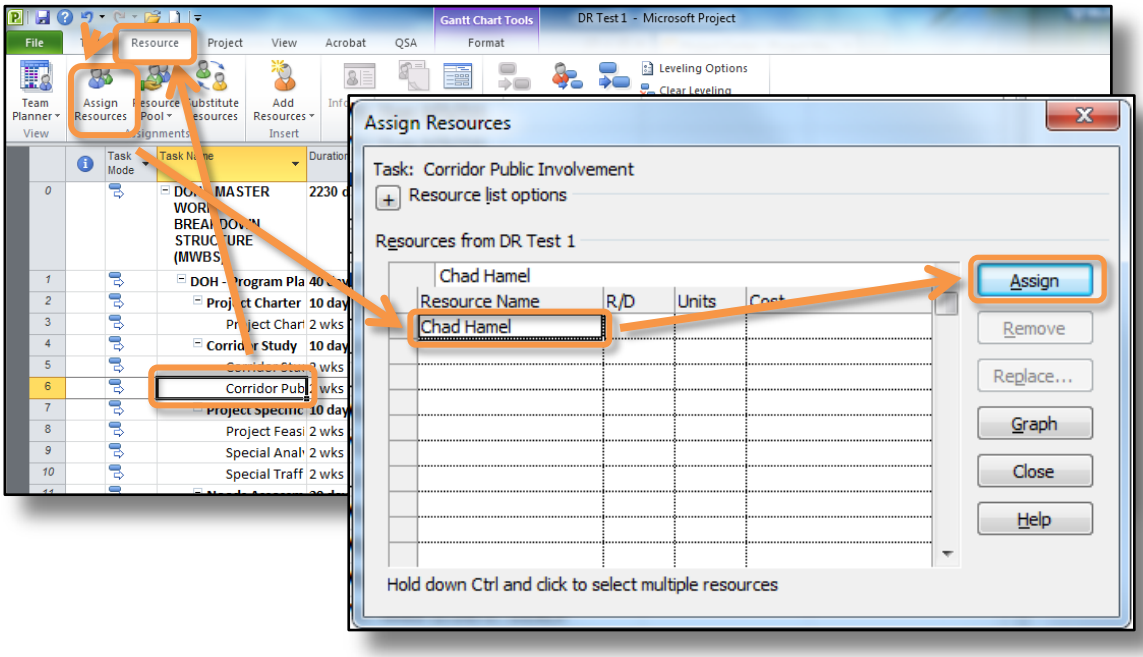


NOTE: Use the **Group By** and **Filter** mechanisms within the **Build Team** window to find the resources you need. You can also filter for resources based on availability and view resource capacity versus demand plotted on a bar chart.

CAUTION: DO NOT use **Local Resources**. Always use **Enterprise Resources.** Generic **Enterprise Resources** have been provisioned on the server.

2. **Assign resources to tasks.** From the Gantt Chart view in MSP, select a task to which you want to assign a resource. On the **Resources** tab in the **Assignments** group, click **Assign Resources**. Click the resource names, and then click **Assign.**

   An alternate way to assign resources is to select by checkbox in the Resource Names column drop down.

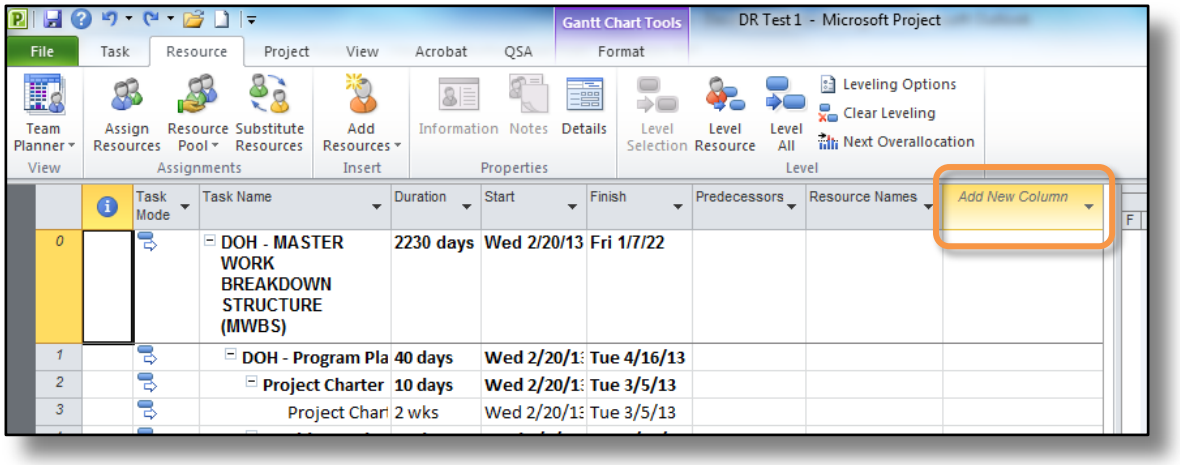


NOTE: Pay attention to unit % and task types when assigning resources to tasks. **ITD has set resources at 50% max unit% which means by default, resources are only available to work 4 hours per day.**

CAUTION: Be very careful when replacing resources. Keep an eye on resource allocations by going to the **Resource Usage** view (**View** tab→**Resource Usage**) and analyzing planned work over the timescale.

3. **Assign work-hours resources to tasks (optional).** When scheduling tasks, Project Managers sometimes prefer to enter the amount of work (or the amount of labor) needed to complete a task, rather than the duration for the task. Entering work reflects real-world scheduling. To enter work hours for resources assigned to tasks, add the

Work column to the **Gantt Chart** view. To do this, click the **Add New Column** column. Type "Work" and select the **Work** column. *(Graphic on following page.)*



4. **Know your task type.** As soon as you assign resources to automatically scheduled tasks, MSP determines how to schedule the task based on the task type. Durations might change as you assign resources to tasks.

> **NOTE:** Manually scheduled tasks don't use task types.

HOW TASK TYPES WORK:

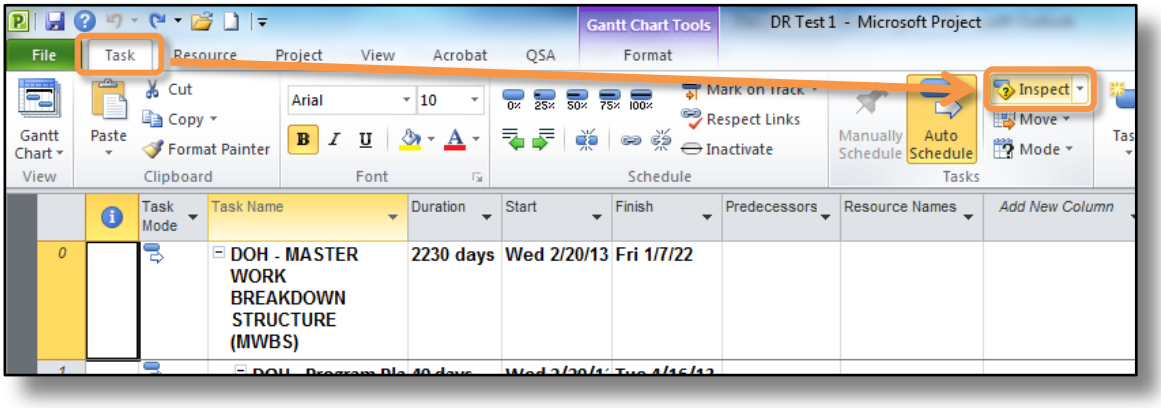
Work, duration, and units (% allocation) are determined by the formula:
Work = Duration * Units

PROJECT TYPE	If you revise work	If you revise duration	If you revise units
Fixed units task	Duration changes	Work changes	Duration changes
Fixed work task	Duration changes	Units change	Duration changes
Fixed duration task	Units change	Work changes	Work changes

a. To set a default task type for the entire project, click the **File** tab, and then click **Options** and then click on **Schedule**. In the **Default task type** box, select **Fixed Units** (the default), **Fixed Duration**, or **Fixed Work**.

b. To change the task type for an individual task, click the **Task** tab, and then in the **Properties** group, click the **Task Information** button. Click the **Advanced** tab, and then in the **Task type** box, click the task type that you want to create.

5. **Identify factors affecting task schedules.** You can use MSP to help you understand how changes to one task can affect the rest of the project. Click the **Task** tab, and then in the **Tasks** group, click **Inspect**. A pane opens on the left showing the factors that affect the scheduling of the selected task.



NOTE: You can also see task scheduling information (such as scheduling mode, duration, and start and finish dates) quickly by hovering the mouse over the task's Gantt bar.

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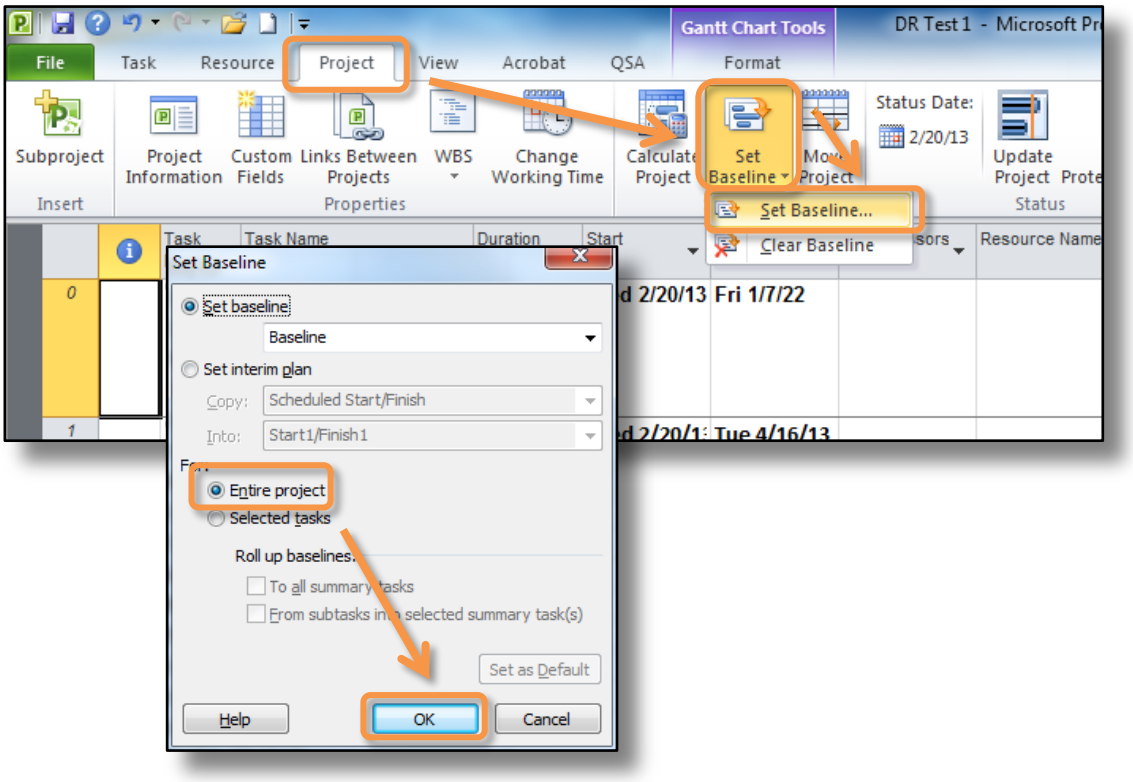
Setting the Project Baseline

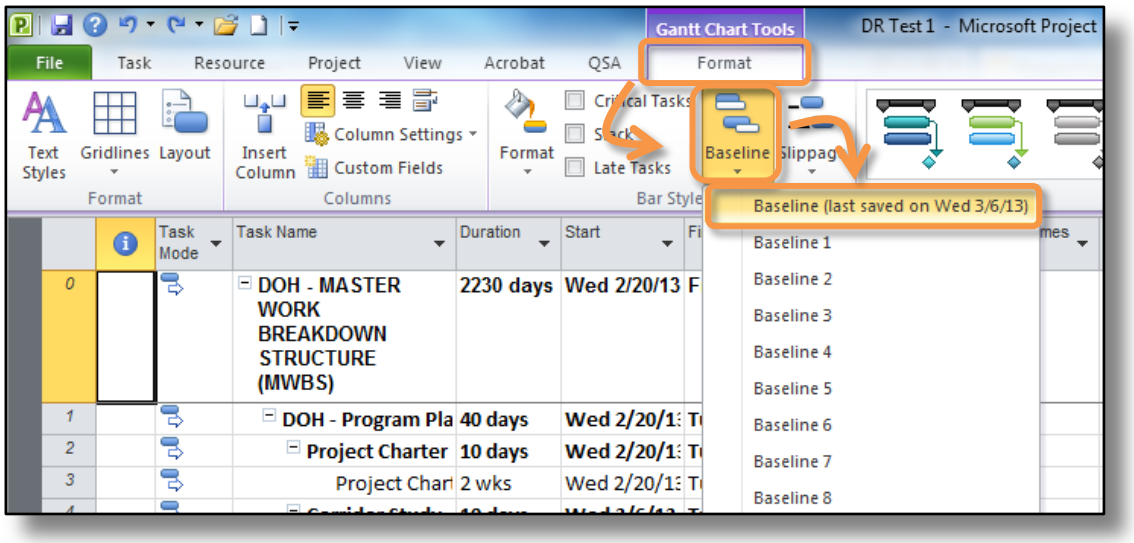
A baseline is critical for enterprise reporting and tracking schedule progress. It is the tool for schedule change control. **You should only baseline once the Project Sponsor approves the schedule.** When you save a baseline, Microsoft Project Professional 2010 (MSP) saves the baseline data as part of the project file. A project schedule that is not baselined will result in planned work and actual work being the same. The baseline dates are what the project will be measured against and reported on to management throughout the various PSS reports.

1. **Save the baseline plan.** After your project plan is solidly in place for the finish date, budget, and scope, you can submit the plan for approval using the PDPs associated with the charter. Once it has been approved, save the baseline plan. Click the **Project** tab, then open the **Set Baseline** drop-down menu and select **Set Baseline...**. Then, in the **Set Baseline** dialogue box, make sure **Entire Project** is selected, and then click **OK**.

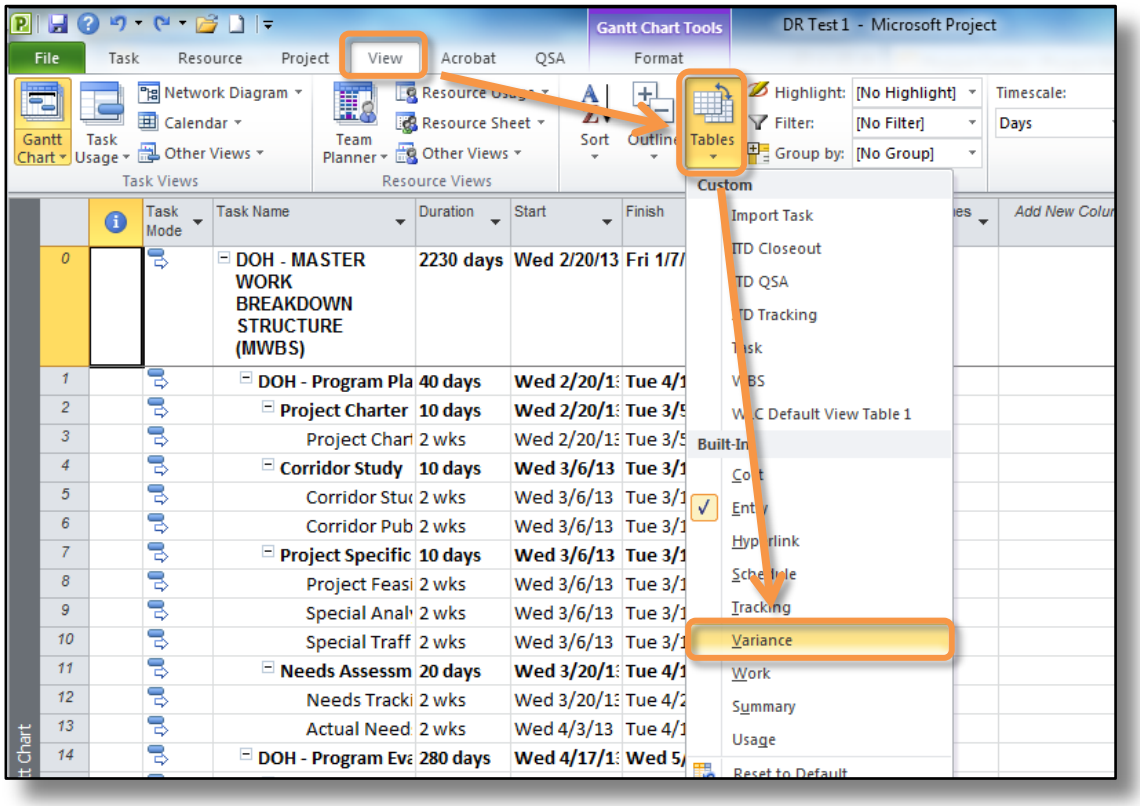


NOTE: Each MSP file can have eleven baselines: the original baseline, plus ten other snapshots of the project's progress. The original baseline, "Baseline," is the only one used for enterprise reporting. Make sure that this baseline is reflected accurately.

2. **View baseline data in a Gantt Chart view.** From the Gantt Chart view, click the **Format** tab under Gantt Chart Tools. Then, in the **Bar Styles** group, click **Baseline**. The baseline information is shown as the lower of the two Gantt bars for each task.



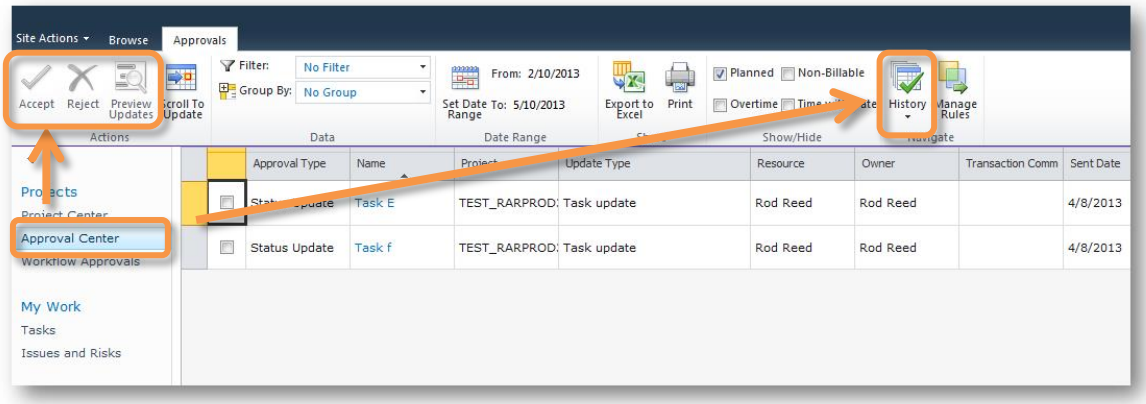
3. **View baseline data in a table.** From the Gantt Chart view, click **Tables**, and then select **Variance**. This table includes fields for baseline and variance start and finish.



UPDATING PROGRESS

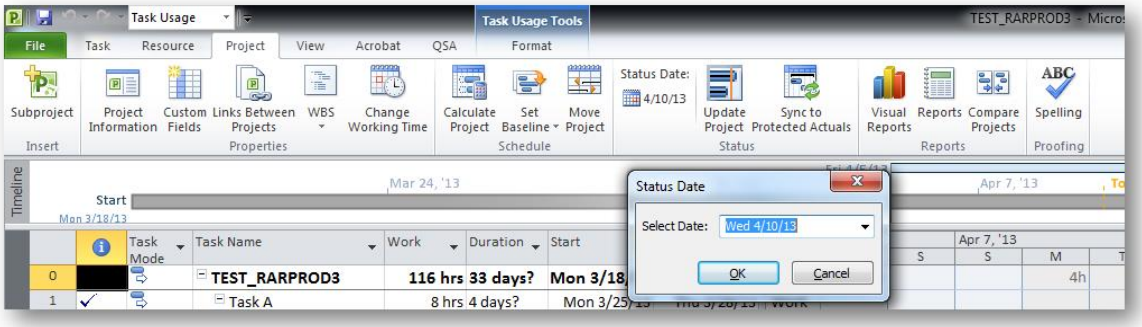
Updating the progress of your project is the only way to make sure it stays on track as work is performed. The focus at this point is on managing changes, updating the schedule, tracking progress, and communicating project information. Microsoft Project Professional 2010 (MSP) tracks four sets of dates: current status, baseline, actual, and projected. When you first set the baseline, projected = baseline. Current Status Date is the date that the task updates have been posted in MS Project. It is represented by the black vertical bar within the Tracking Gantt Chart. When a task is 100% complete, the date becomes the actual date. Tasks not yet completed ar projected. Baseline, actual, and projected values exist for the start date, finish date, duration, cost, and work.

1. **Accept & publish updates.** As a Project Manager you need to accept updates submitted by the resources on your project(s). To do this, you must go to the Project Web App (PWA), click **Approval Center** and accept/reject updates. You must also publish the updates by going to the **Approval Center**, clicking **History** and selecting **Status Updates**. You can then publish the pending updates.



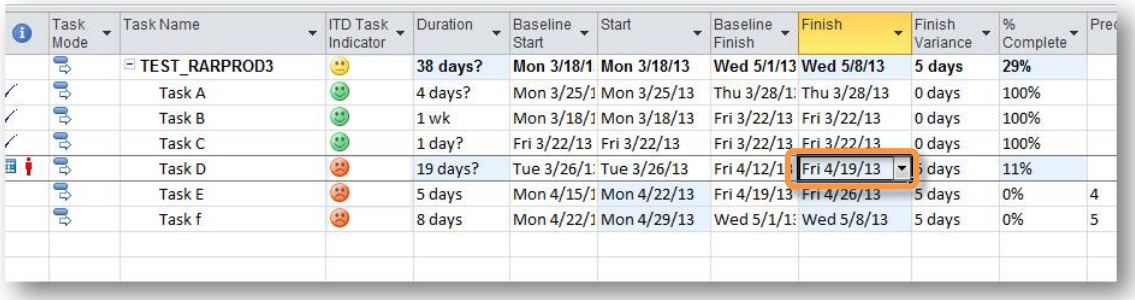
NOTE: Updates from resources should be submitted at least once every two weeks opposite payday Friday. The Project Manager should accept and publish those updates by the following Monday. Next, the Project Manager should make updates to the project schedule and finally, publish the updates.

2. **Manage changes.** Managing changes involves modifying durations, dates, dependencies, resource assignments, or tasks based on requested changes or new information. Keep the current fields up to date and compare them to the baseline. You should open the project in MSP and go to the **Tracking Gantt** view to update the status of each task. Be sure to set the **Status Date** to indicate when you last updated the project schedule. *(Graphic on following page.)*



NOTE: The **Status Date** is used to evaluate and project the project's performance, based on the project's trends so far, where you can expect costs, work, and other aspects of the project to be on the status date set.

3. **Manually update tasks.** The PM may need to manually update some tasks.



CAUTION: Be careful when updating **%Complete** on the task, as doing so will update **actual work** and **remaining work**.

NOTE: If you want to enter actual and remaining work hours or costs, use the tracking table. Click the **View** tab. In the **Data** group, point **Table**, and then click **Tracking**. Enter progress data in the **Act. Work** or **Act. Cost** fields for the task. You can also use the tracking table to enter percent complete, actual start and finish dates, and actual and remaining duration.

4. **Reschedule remaining work.** Go to **Project**, **Update Project** to reschedule remaining work. From here, you can reschedule uncompleted work to start after a certain date for the entire project or selected tasks. *(Graphic on following page.)*

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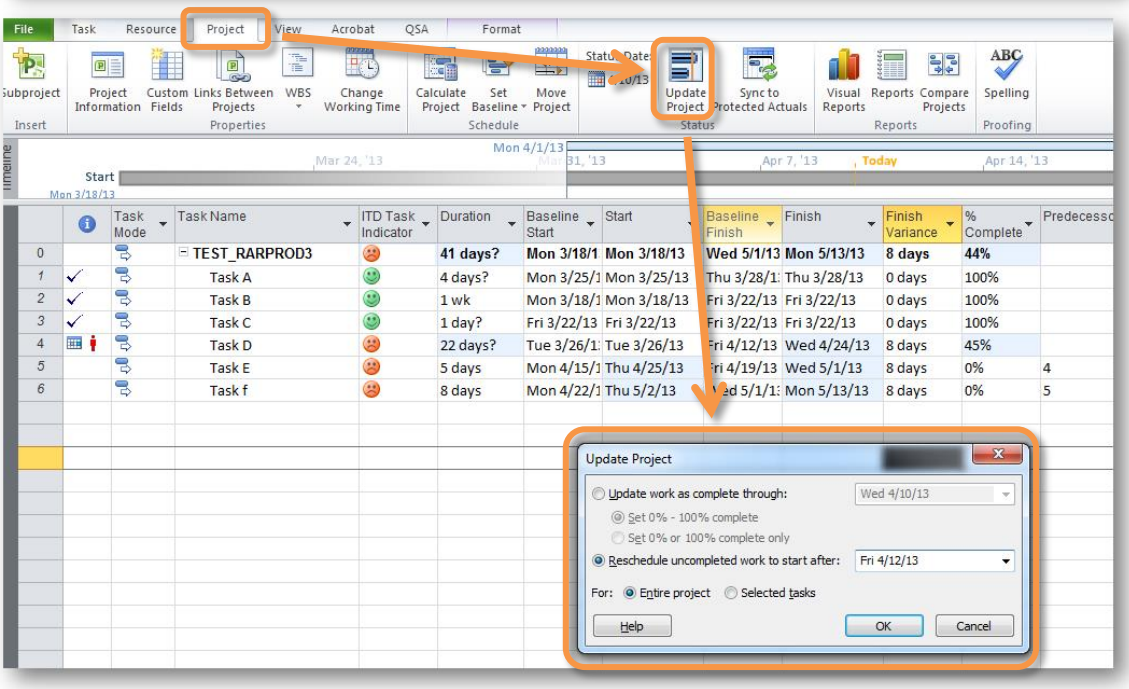
CAUTION: Be careful using the Entire Project option as it will put constraints on all the tasks that are behind schedule even if they have not started. You can update the predecessor task. It will put a constraint on that task and shift the successor tasks without adding a constraint to them.

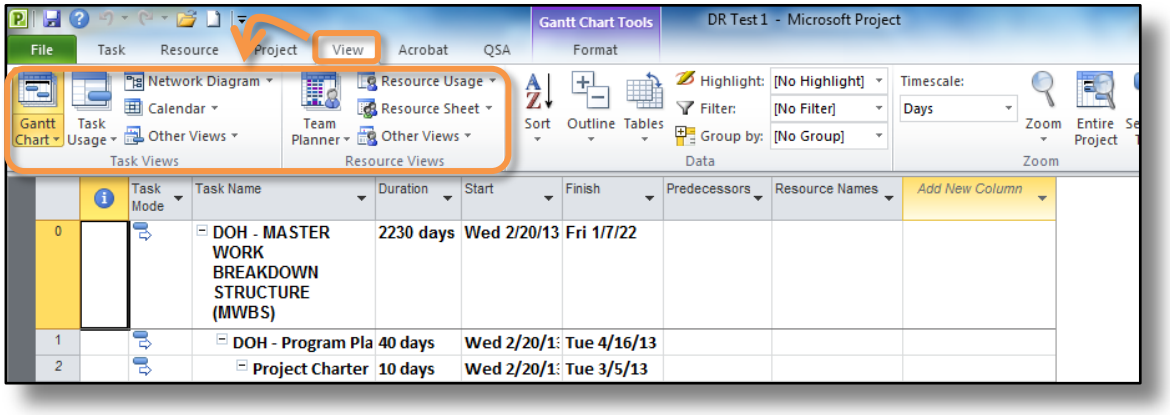


VIEWING REPORTS

Keep stakeholders and team members up-to-date on project progress by providing them with access to online or printed views and reports. The Project Scheduling System (PSS) provides many ways to print and distribute both detailed and overview information project information quickly and efficiently. You can also get custom reports directly from the Business Intelligence Center in the Project Web App (PWA).

Viewing Reports in Microsoft Project Professional (MSP)

1. **Select a view.** MSP has views to help you see project information and report it to others on your team or organization. Click the **View** tab. In either the **Task Views** group or the **Resource Views** group, select the view you want to use. The most useful views include:
    a. Any ITD specific views
    b. Gantt Chart
    c. Tracking Gantt
    d. Resource Usage



Generating Reports with the PWA

1. **Generate a report.** You can use the **Business Intelligence Center** on the PWA to access custom reports created for the ITD environment. To access these reports, open your project in PWA, and then click **ITD Custom Reports** under **Business Intelligence** in the **Quick Launch** (you may have to scroll down to get there). Then, select the report type you wish to generate. *(Graphic on following page.)*

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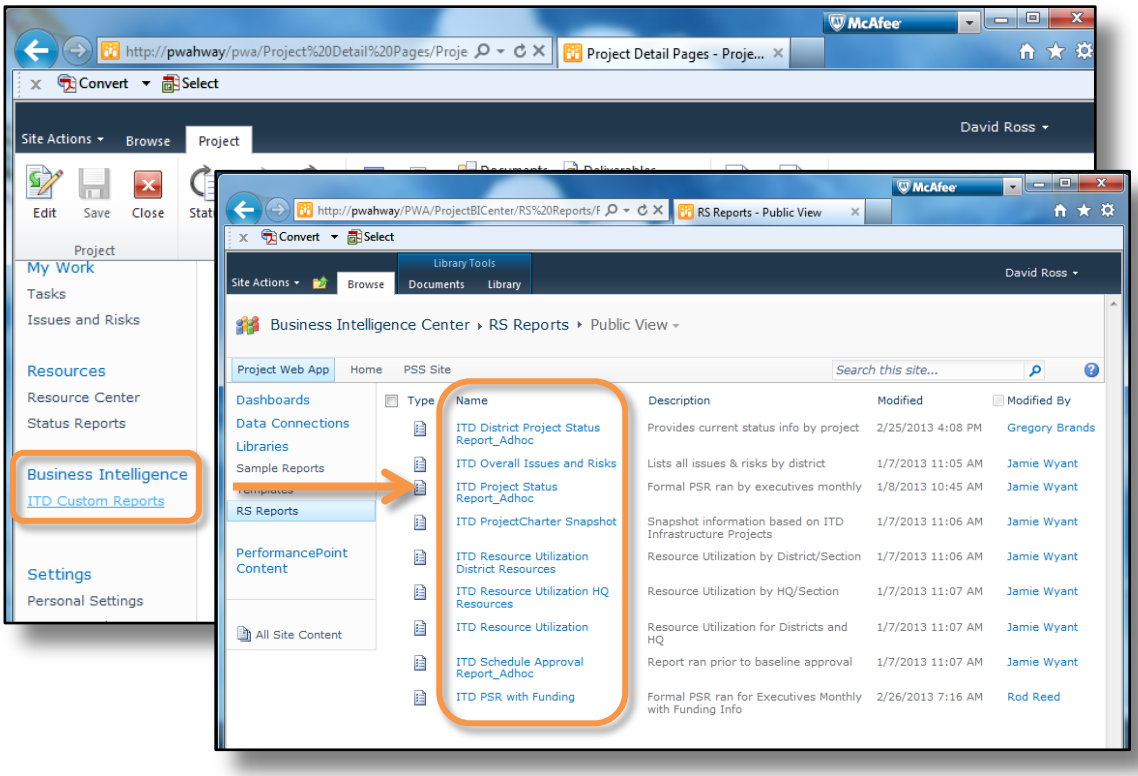
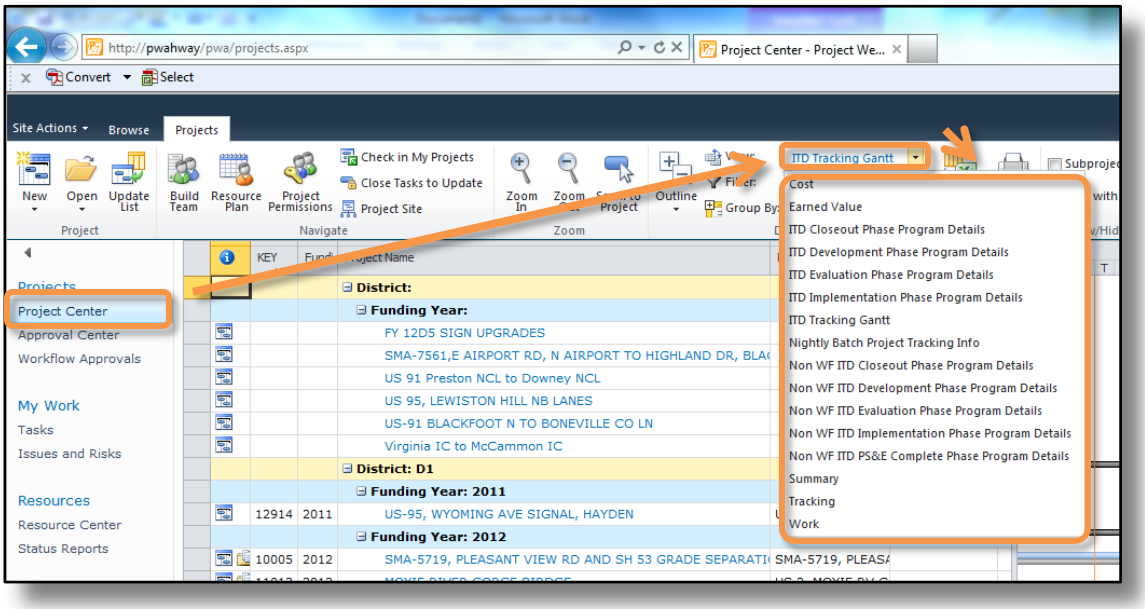


2. **View reports in PWA.** The Project Web App offers several ways to view reports. The **Project Center** provides basic views which will list all projects you have visibility to. Generally you should be using the views with "ITD" in front of the names. To change your view in the **Project Center**, simply select a different view from the **view** drop-down menu.

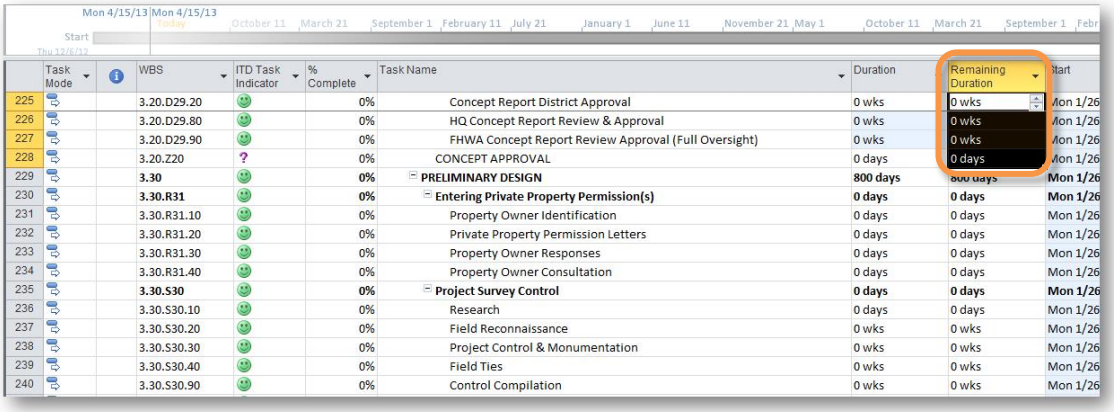


ARCHIVING A PROJECT

Just because your project is almost finished doesn't mean that your work is done. You still need to resolve any final project details and obtain sponsor acceptance of final deliverables. You should update the lists on the Project site and conduct a "lessons learned" session, recording information about areas for improvement and best practices. You need to make final updates to the project plan including properly closing out tasks and releasing resources. Finally, archive the project plan according to ITD's guidelines.

Once the project is complete the schedule should be closed out appropriately by following these steps:

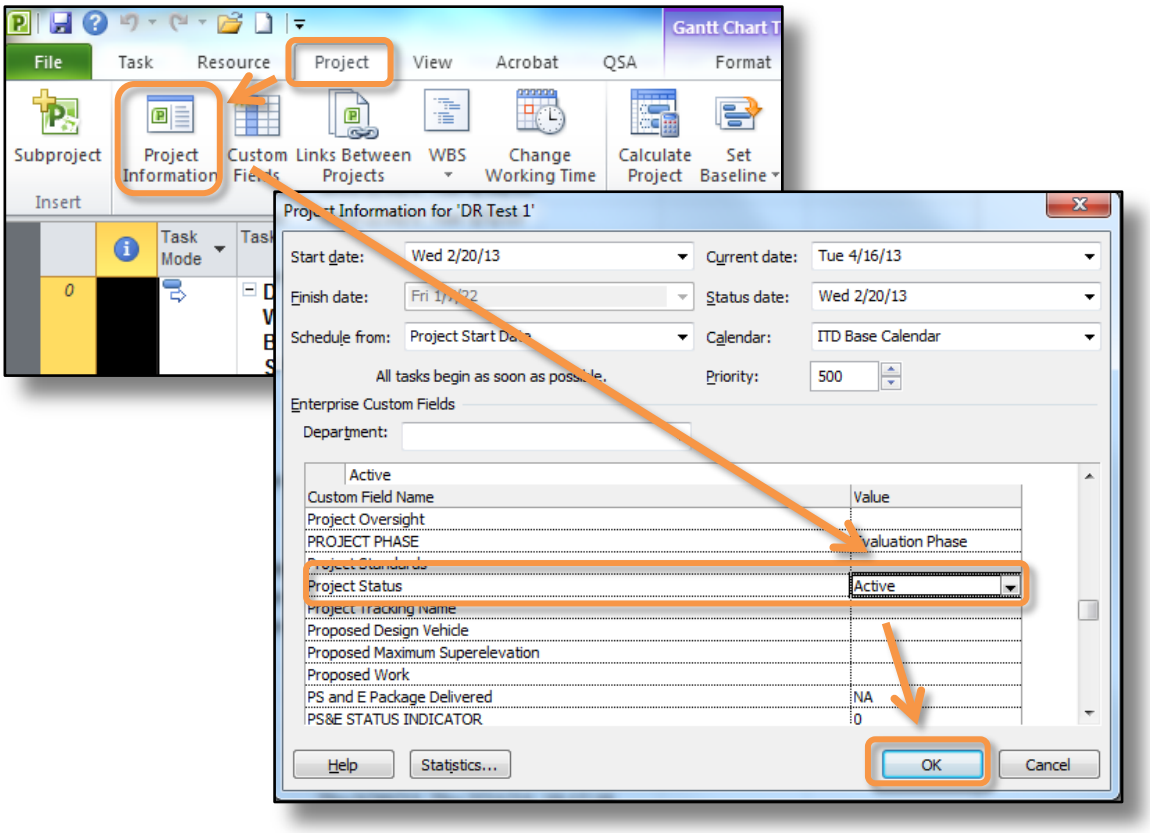
1. **Set Remaining Duration to Zero.** Open the project you wish to update in Microsoft Project Professional 2010 (MSP). Insert **Remaining Duration** column and change all values to **0** (zero).



	Task Mode	WBS	ITD Task Indicator	% Complete	Task Name	Duration	Remaining Duration	Start
225		3.20.D29.20		0%	Concept Report District Approval	0 wks	0 wks	Mon 1/26
226		3.20.D29.80		0%	HQ Concept Report Review & Approval	0 wks	0 wks	Mon 1/26
227		3.20.D29.90		0%	FHWA Concept Report Review Approval (Full Oversight)	0 wks	0 wks	Mon 1/26
228		3.20.Z20	?	0%	CONCEPT APPROVAL	0 days	0 days	Mon 1/26
229		**3.30**		**0%**	**PRELIMINARY DESIGN**	**800 days**	**800 days**	**Mon 1/26**
230		**3.30.R31**		**0%**	**Entering Private Property Permission(s)**	**0 days**	**0 days**	**Mon 1/26**
231		3.30.R31.10		0%	Property Owner Identification	0 days	0 days	Mon 1/26
232		3.30.R31.20		0%	Private Property Permission Letters	0 days	0 days	Mon 1/26
233		3.30.R31.30		0%	Property Owner Responses	0 days	0 days	Mon 1/26
234		3.30.R31.40		0%	Property Owner Consultation	0 days	0 days	Mon 1/26
235		**3.30.S30**		**0%**	**Project Survey Control**	**0 days**	**0 days**	**Mon 1/26**
236		3.30.S30.10		0%	Research	0 days	0 days	Mon 1/26
237		3.30.S30.20		0%	Field Reconnaissance	0 wks	0 wks	Mon 1/26
238		3.30.S30.30		0%	Project Control & Monumentation	0 wks	0 wks	Mon 1/26
239		3.30.S30.40		0%	Field Ties	0 wks	0 wks	Mon 1/26
240		3.30.S30.90		0%	Control Compilation	0 wks	0 wks	Mon 1/26

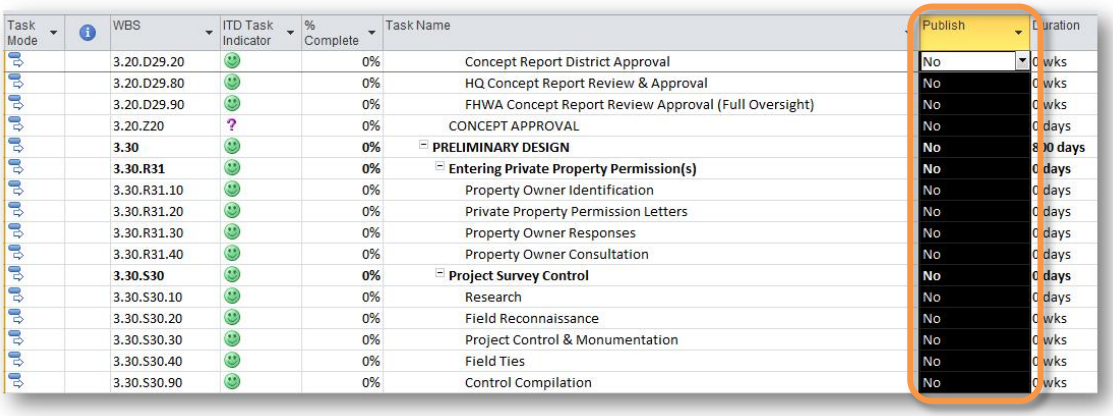
CAUTION: Simply marking tasks as 100% complete will just add Remaining Duration to Actual Duration.

2. **Update necessary Enterprise Custom Fields.** From the **Project** tab, go to **Project Information.** Update **Project Status** to "Archive" and then click **OK** if you no longer need to report on it. This will indicate to Project Server Administrator that the Project should be archived. *(Graphic on following page.)*



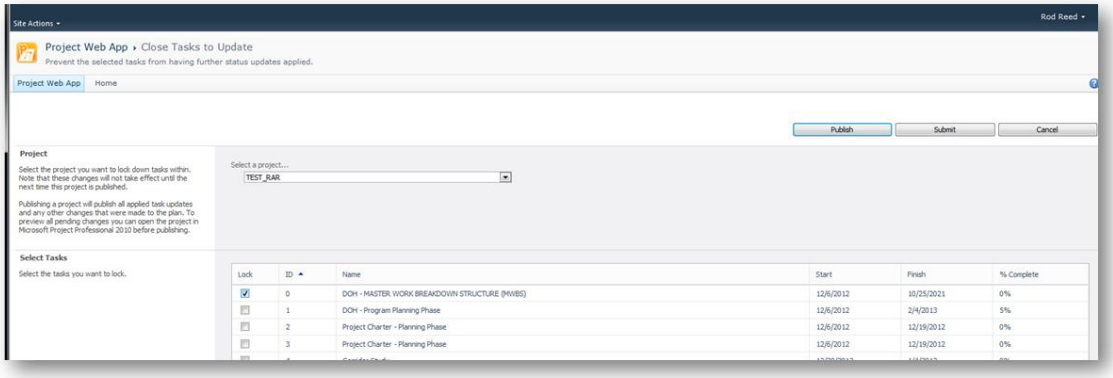
3. **Set the Publish flag to No. Do this for all tasks.** From MSP, insert the Publish Flag. Change all values in Publish Field to **No.**

NOTE : Publish (task field) - The publish field indicates whether the current task should be published to Project Server 2010 with the rest of the project. By default, the field is set to Yes.



Task Mode	WBS	ITD Task Indicator	% Complete	Task Name	Publish	Duration
	3.20.D29.20		0%	Concept Report District Approval	No	0 wks
	3.20.D29.80		0%	HQ Concept Report Review & Approval	No	0 wks
	3.20.D29.90		0%	FHWA Concept Report Review Approval (Full Oversight)	No	0 wks
	3.20.Z20	?	0%	CONCEPT APPROVAL	No	0 days
	3.30		**0%**	**PRELIMINARY DESIGN**	**No**	**80 days**
	3.30.R31		**0%**	**Entering Private Property Permission(s)**	**No**	**0 days**
	3.30.R31.10		0%	Property Owner Identification	No	0 days
	3.30.R31.20		0%	Private Property Permission Letters	No	0 days
	3.30.R31.30		0%	Property Owner Responses	No	0 days
	3.30.R31.40		0%	Property Owner Consultation	No	0 days
	3.30.S30		**0%**	**Project Survey Control**	**No**	**0 days**
	3.30.S30.10		0%	Research	No	0 days
	3.30.S30.20		0%	Field Reconnaissance	No	0 wks
	3.30.S30.30		0%	Project Control & Monumentation	No	0 wks
	3.30.S30.40		0%	Field Ties	No	0 wks
	3.30.S30.90		0%	Control Compilation	No	0 wks

4. **Publish the schedule.** Go to **Project Web App (PWA) → Server Settings → Close Tasks to Updates**, select the Project Summary Task (Task 0) and **Publish.**

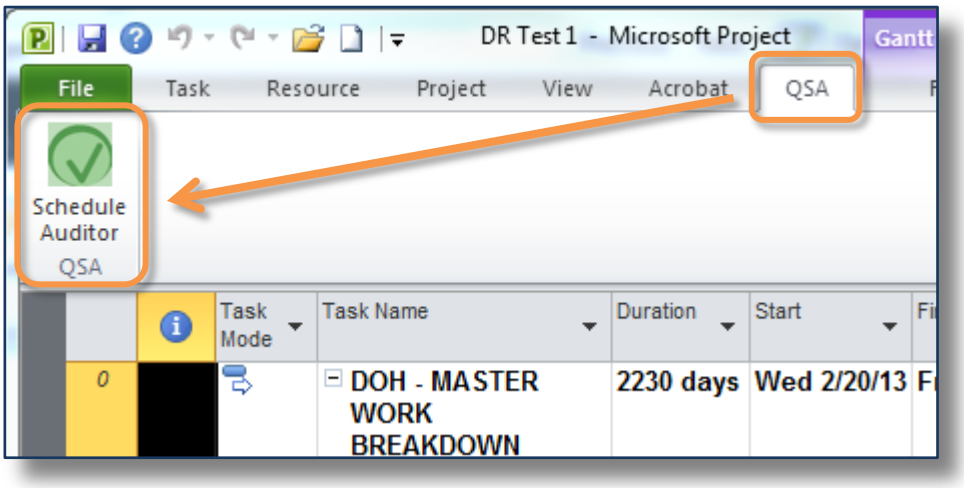


5. **Update the Project Site appropriately and archive documentation.** Make sure all Project Site documentation is current, and then save all documents from Project Site to ProjectWise.

RUNNING QUANTUMPM SCHEDULE AUDITOR (QSA)

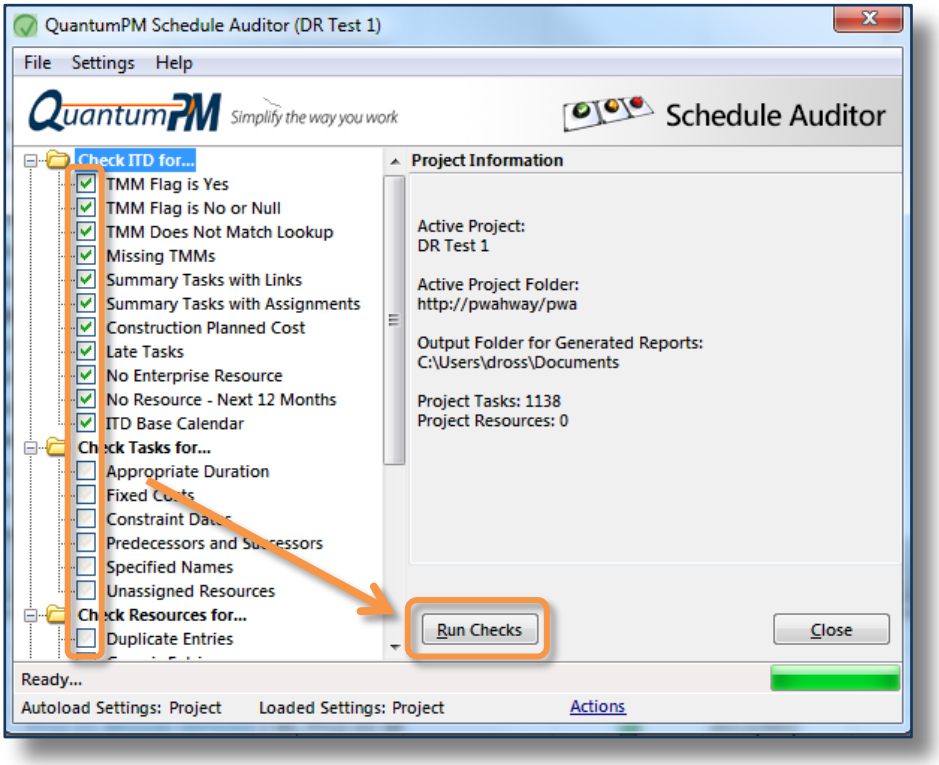
QSA runs compliance checks against the project for both ITD specific business requirements and other options. You can run QSA at any time from Microsoft Project Professional 2010 (MSP); additionally, QSA will automatically run when you publish a schedule.

1. **Open QSA** by clicking the **QSA tab**.



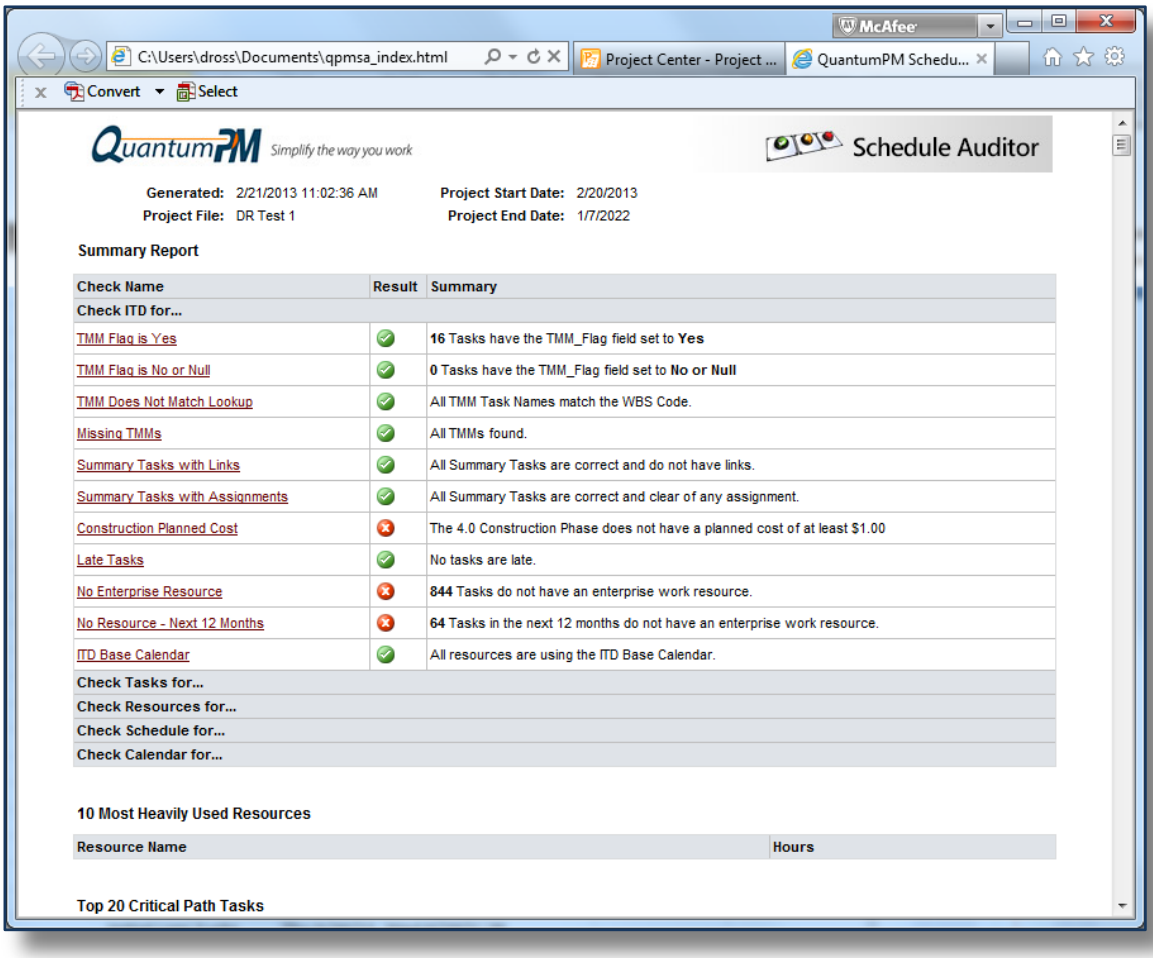
NOTE: To find out more about any specific check from the check list(s), select the check you wish to find out about, and then click the **Info** tab.

2. **Specify checks to run** by clicking the checkbox next to each check. After selecting the checks you wish to run, click **Run Checks.**



NOTE: ITD checks will always run. A report will be generated in a new window. By default, the report will save to your Documents folder. To change this, go to **Settings→Options**.

3. **Take corrective action** for anything marked with a red ⊗ on the schedule.

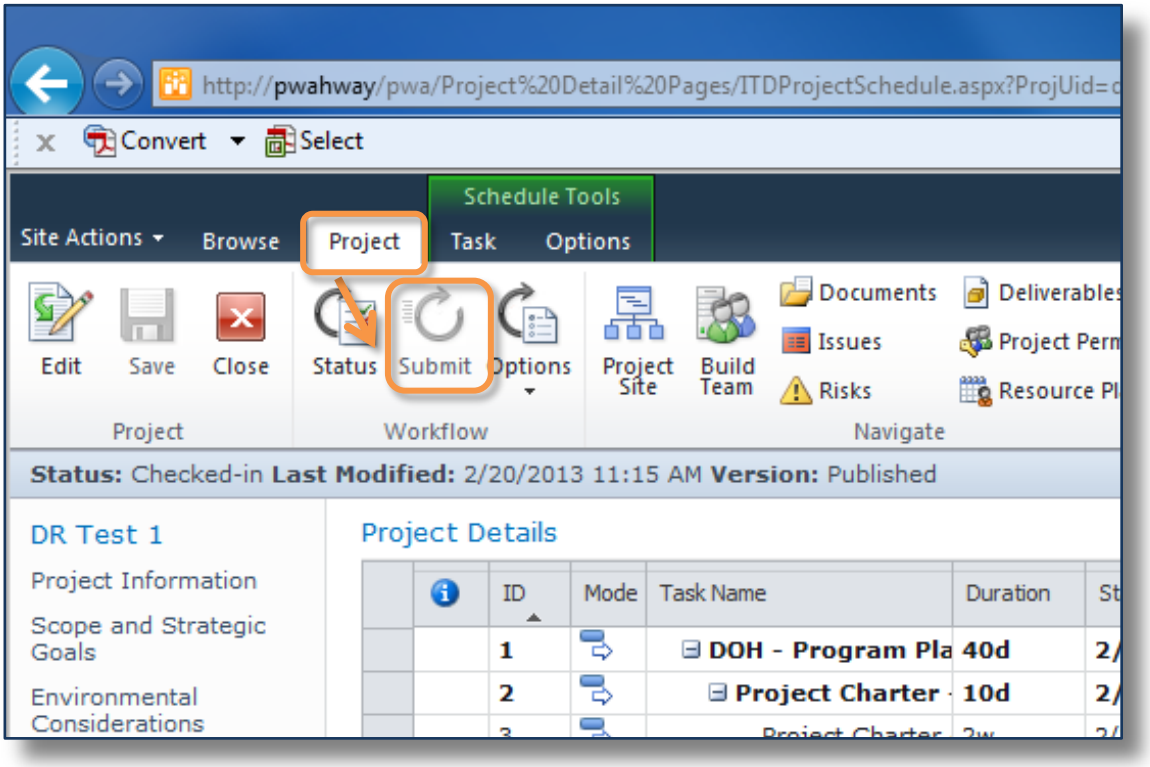


4. **Rerun QSA to ensure schedule is in compliance.** *(See steps 1 & 2).*

SUBMITTING A CHARTER

After you are done reviewing your charter and you are ready to send it to either the Project Owner or Project Sponsor for approval, you will need to electronic submit the charter to them so that there is a record saying it has been approved.

1. **Submit the charter.** Open your project in the Project Web App (PWA). Then, from the **Project** tab, click **Submit**.



Approving a Charter

There are three approval methods the Project Owner and Project Sponsor can use. The first approval method can be done from the approval email that is sent out automatically. The other two approval methods are done directly through Project Web App (PWA).

1. **From the approval email**, click the **Approve** link.
2. **From PWA**, go to **Workflow Approvals** in the **Project Server Workflow Tasks.**
3. **From PWA**, go to the **Workflow Status** page, and then click **Additional Workflow Data.**

Accessing Project Web App

Since many of the steps require you to be working through PWA, it is important that you understand how to access it. For further information on what you can do through PWA and how it varies from Microsoft Project Professional 2010 (MSP), please see the "*Understanding the Software*" section.

1. **Open Internet Explorer.**
2. **Navigate to the URL:** *http://pwahway/pwa*

NOTE: You may want to add this URL to your Favorites in Internet Explorer, as it is a site you will come back to regularly throughout the process of creating and updating your project charter.

PROJECT DETAIL PAGE FUNCTIONS

The Project Manager fills out these sections using the project detail pages (PDPs) on the Project Web App (PWA). The information entered into these PDPs will be the information that makes up the project charter.

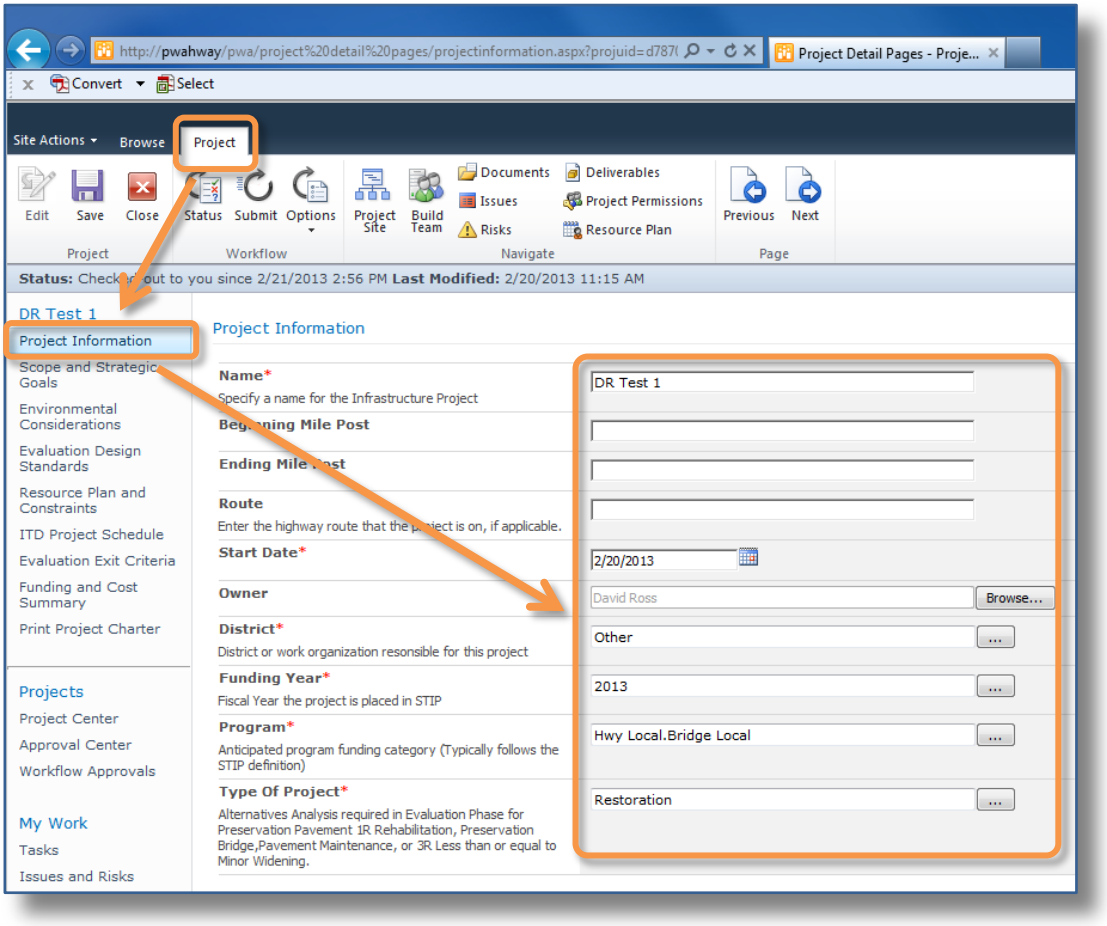
To access these PDPs, *Open your project in Project Web App*. Then, click **Edit** 

Rules for PDP Fields

- Fields that include an ellipses button  contain drop-down menus.
- Fields that include a browse button  contain pop-up windows to choose items from.
- Fields that include a calendar button  contain a pop-up calendar to choose a date from.
- Fields that include a Yes/No drop-down  allow you to choose Yes or No.
- Fields that don't contain any buttons are text or narrative fields. You can write information into these fields by simply clicking inside them and then using your keyboard to type.

UPDATING PROJECT INFORMATION

Under the **Project** tab, click **Project Information**. Then, input all of the information into the appropriate fields. Some of this information will likely already be filled out with information from Microsoft Project Professional 2010 (MSP).



Name

Pulls automatically from MSP. Update if necessary.

Beginning Mile Post

Enter the beginning milepost for construction, if applicable.

Ending Mile Post

Enter the ending milepost for construction, if applicable.

Route

Enter the highway route that the project is on, if applicable.

Start Date

Enter project start date by using the calendar button  .

Owner

Click the browse button 

to select an *Owner* for the project's schedule. This will typically be the Project Manager, and **not the Project Owner.**

District

District or work organization responsible for the project. Pulls automatically from MSP. Update if necessary by clicking the ellipses button 

.

Funding Year

Fiscal Year the project is placed in STIP. Pulls automatically from MSP. Update if necessary by clicking the ellipses button 

.

Program

Anticipated program funding category (Typically follows the STIP definition). Pulls automatically from MSP. Update if necessary by clicking the ellipses button 

.

Type of Project

Pulls automatically from MSP. Update if necessary by clicking the ellipses button 

. Note that an Alternatives Analysis is required in the Evaluation Phase for the Preservation Pavement 1R, Rehabilitation, Preservation Bridge, Pavement Maintenance, and 3R Less than or equal to Minor Widening project types.

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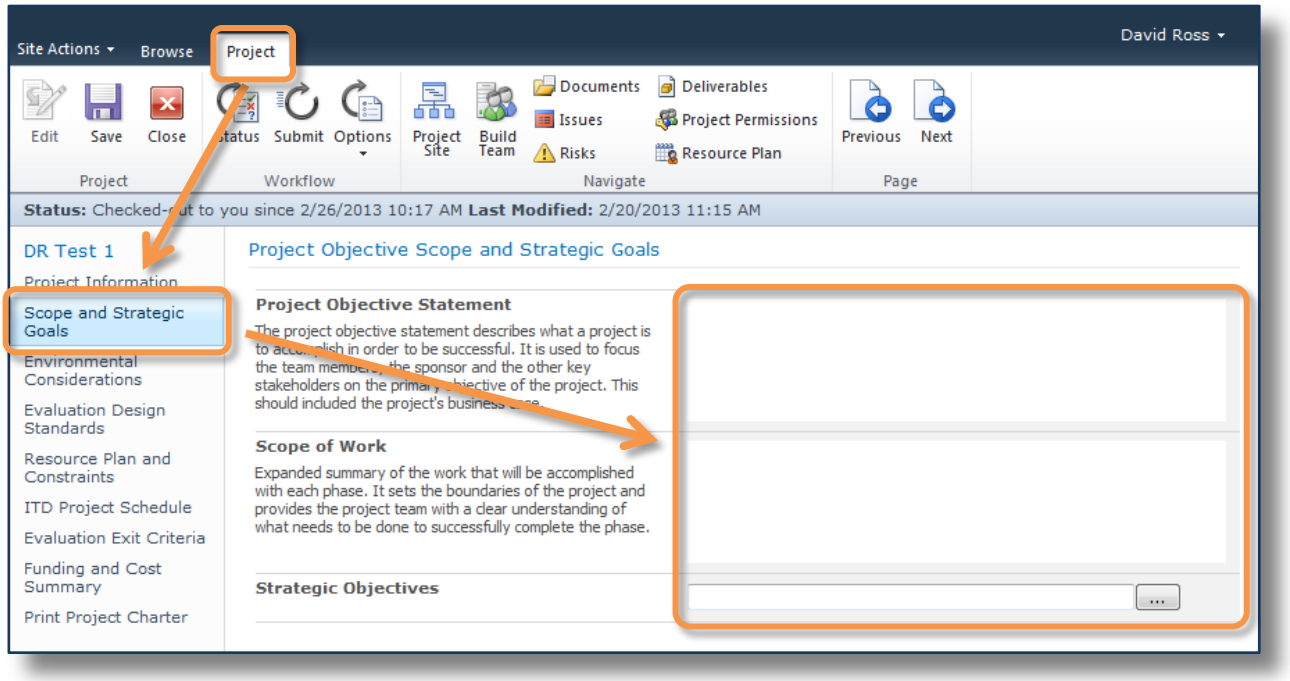
Writing Scope and Objectives

Under the **Project** tab, click **Scope and Strategic Goals**. Then, fill out the two narrative fields and select strategic objectives from the drop-down menu.



Project Objective Scope and Strategic Goals

Project Objective Statement

The project objective statement describes what a project is to accomplish in order to be successful. It is used to focus the team members, the Project Sponsor, and the other key stakeholders on the primary objective of the project. This should include the project's business case.

The Project Objective Statement will cover the Triple Constraint: *scope, schedule, and budget.*

If you are unsure of how to word your Project Objective Statement, you can use the following template as a *basic* guide for writing it:

> "The objective of *(insert the project name)* is to *(insert major outcome or deliverables)*. This will be accomplished by implementing *(insert those items that define the project scope)*, to be completed by *(insert the project due date)*, and not to exceed a budget of *(insert budget amount)*."

Remember that this template is just a *basic* guide for writing a Project Objective Statement. If you feel a need to add any additional information, feel free to do so. However, keep in mind that you will be able to expand upon any details in the scope.

Scope of Work

The scope of work should be an expanded summary of the work that will be accomplished with each phase. It sets the boundaries of the project and provides the project team with a clear understanding of what needs to be done to successfully complete the project.

It is also a good idea to list any constraints in the scope, and also make note of what the project will *not* include. This is a good way of managing the expectations of the project team and key stakeholders.

Strategic Objectives

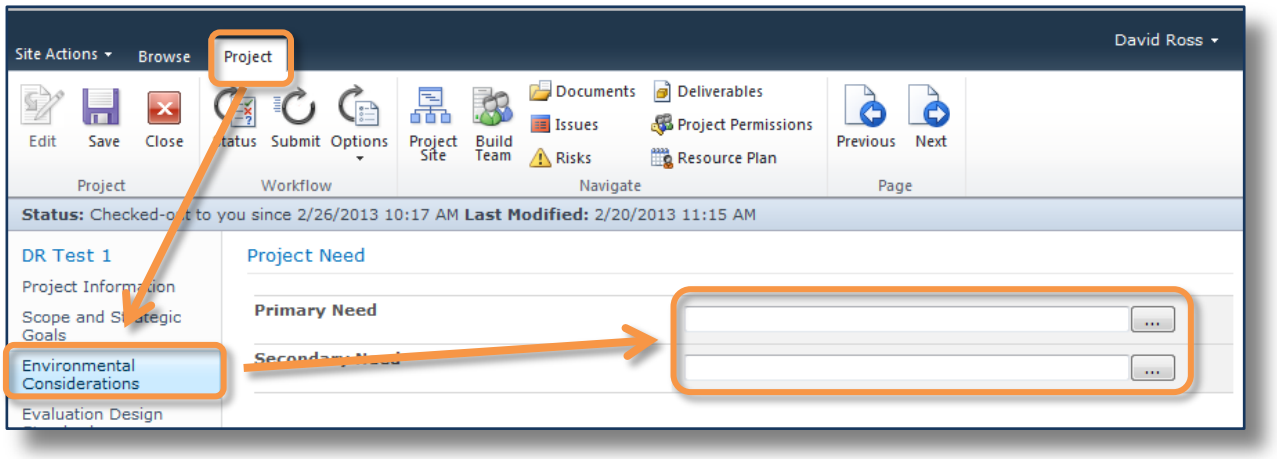
This is a set of universal ITD objectives for projects. Select all of the strategic objectives that apply to your project by clicking the ellipses button  .

DOCUMENTING ENVIRONMENTAL CONSIDERATIONS (NOTE: INFRASTRUCTURE PROJECTS ONLY)

For more details on the specific environmental requirements for your project type, please refer to the *Environmental Process Manual*.

Under the **Project** tab, click **Environmental considerations**. Then, use the drop-down menus and narrative/text fields to fill out all of the information that your project requires.

Project Need



Primary Need

This is the primary reason for the project's existence. This field can be edited by clicking the ellipses button ....

Secondary Need

This is the secondary reason for the project's existence. This field can be edited by clicking the ellipses button .... Note that you can select one or more secondary need(s).

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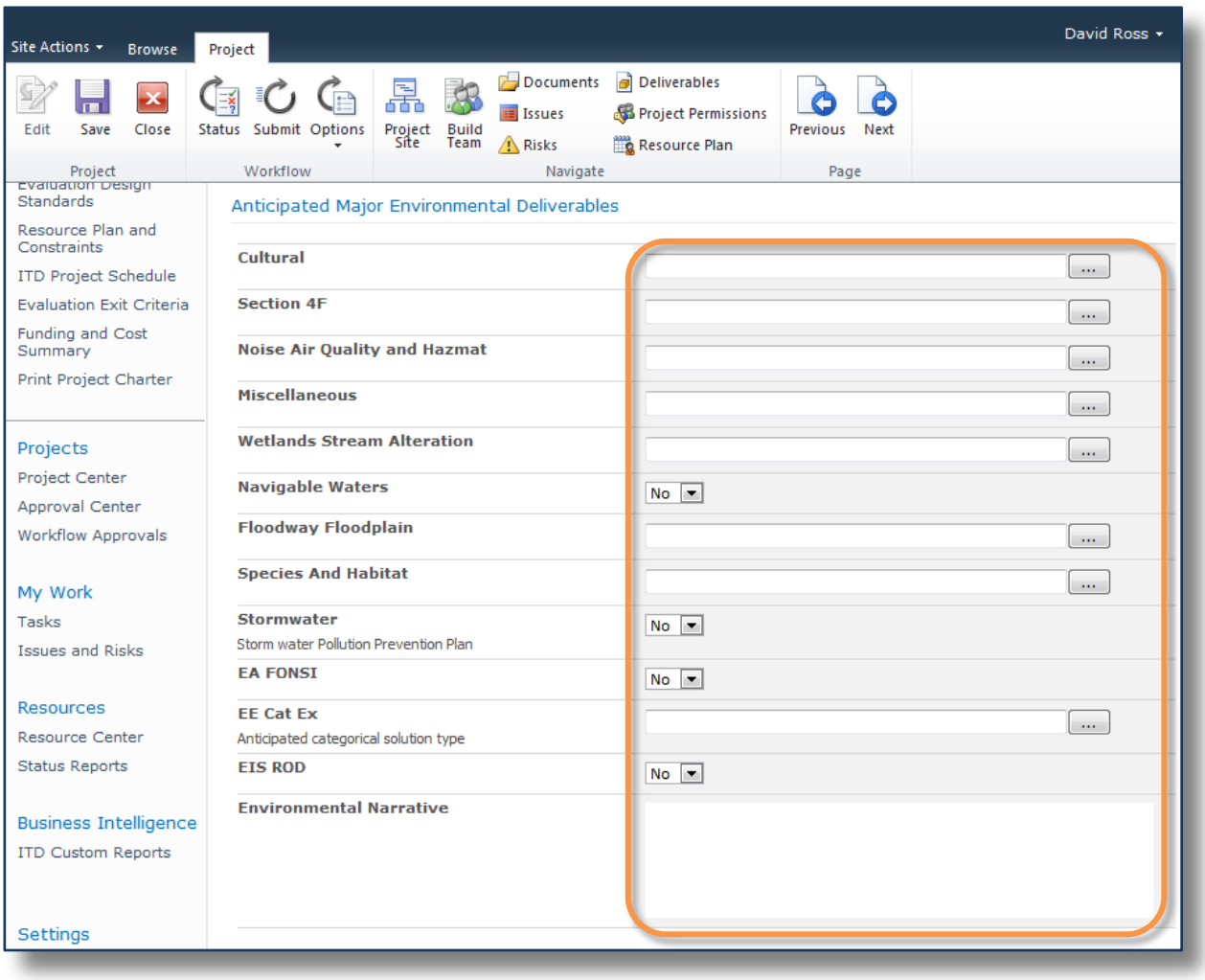
ANTICIPATED MAJOR ENVIRONMENTAL DELIVERABLES (NOTE: INFRASTRUCTURE PROJECTS ONLY)



Cultural

Select any of the provided Cultural deliverables that apply to your project by clicking the ellipses button ....

Section 4F

Select from Section 4F Deminimus and Section 4F Evaluation including Alternatives Analysis by clicking the ellipses button .... Add whichever is necessary for your project. Note that you can add both, if applicable.

Noise Air Quality and Hazmat

Select any of the provided Noise Air Quality and Hazmat deliverables that apply to your project by clicking the ellipses button ....

Miscellaneous

Select any of the provided Miscellaneous deliverables that apply to your project by clicking the ellipses button ....

Wetlands Stream Alteration

Select any of the provided Wetlands Stream Alteration deliverables that apply to your project by clicking the ellipses button ....

Navigable Waters

Select Yes or No by using the Yes/No drop-down No to show whether or not your project affects Navigable Waters.

Floodway Floodplain

Select any of the provided Floodway Floodplain deliverables that apply to your project by clicking the ellipses button ....

Species and Habitat

Select any of the provided Species and Habitat deliverables that apply to your project by clicking the ellipses button ....

Stormwater

Select Yes or No by using the Yes/No drop-down No to show whether or not your project includes a Stormwater Pollution Prevention Plan.

EA FONSI

Select Yes or No by using the Yes/No drop-down No to show whether or not your project includes an Environmental Assessment, Finding of No Significant Impact.

EE Cat Ex

Select from No, Yes-Cat Ex ITD Approval, or Yes-Cat Ex FHWA Approval by clicking the ellipses button ....

EIS ROD

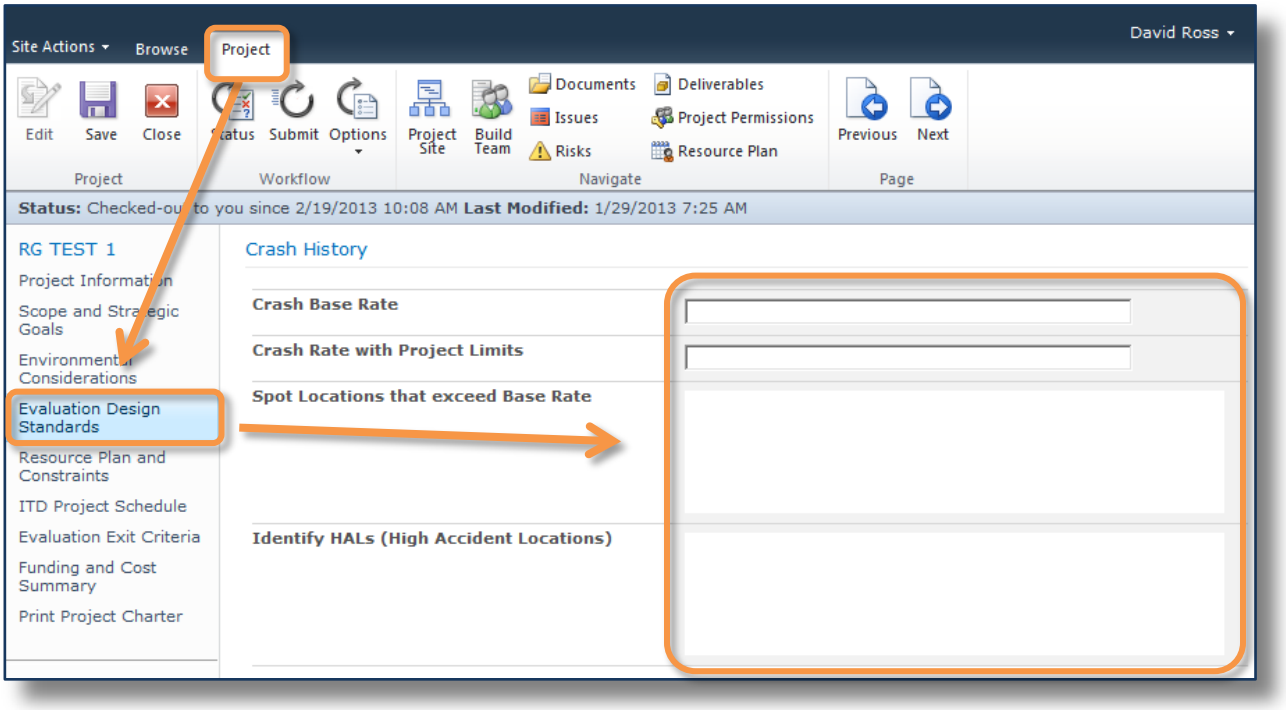
Select Yes or No by using the Yes/No drop-down No to show whether or not your project includes an Environmental Impact Statement, Record of Decision.

Environmental Narrative

Use this field to sum up your environmental deliverables, and also include any information that you think is necessary to supplement the list of deliverables.

Documenting Evaluation Design Standards (Note: Infrastructure Projects Only)

Crash History



Crash Base Rate

Enter the statewide accident rate for highways and roads with similar widths and traffic volumes.

Crash Rate within Project Limits

Enter this information (from WEBCARS).

Spot Locations that exceed Base Rate

Make note of any locations on route that exceed the Crash Base Rate.

Identify HALs (High Accident Locations)

Identify any locations on the route that have exceptionally high accident rates compared to the rest of the route.

Can be found at *http://www.itd.idaho.gov/apps/webcars*

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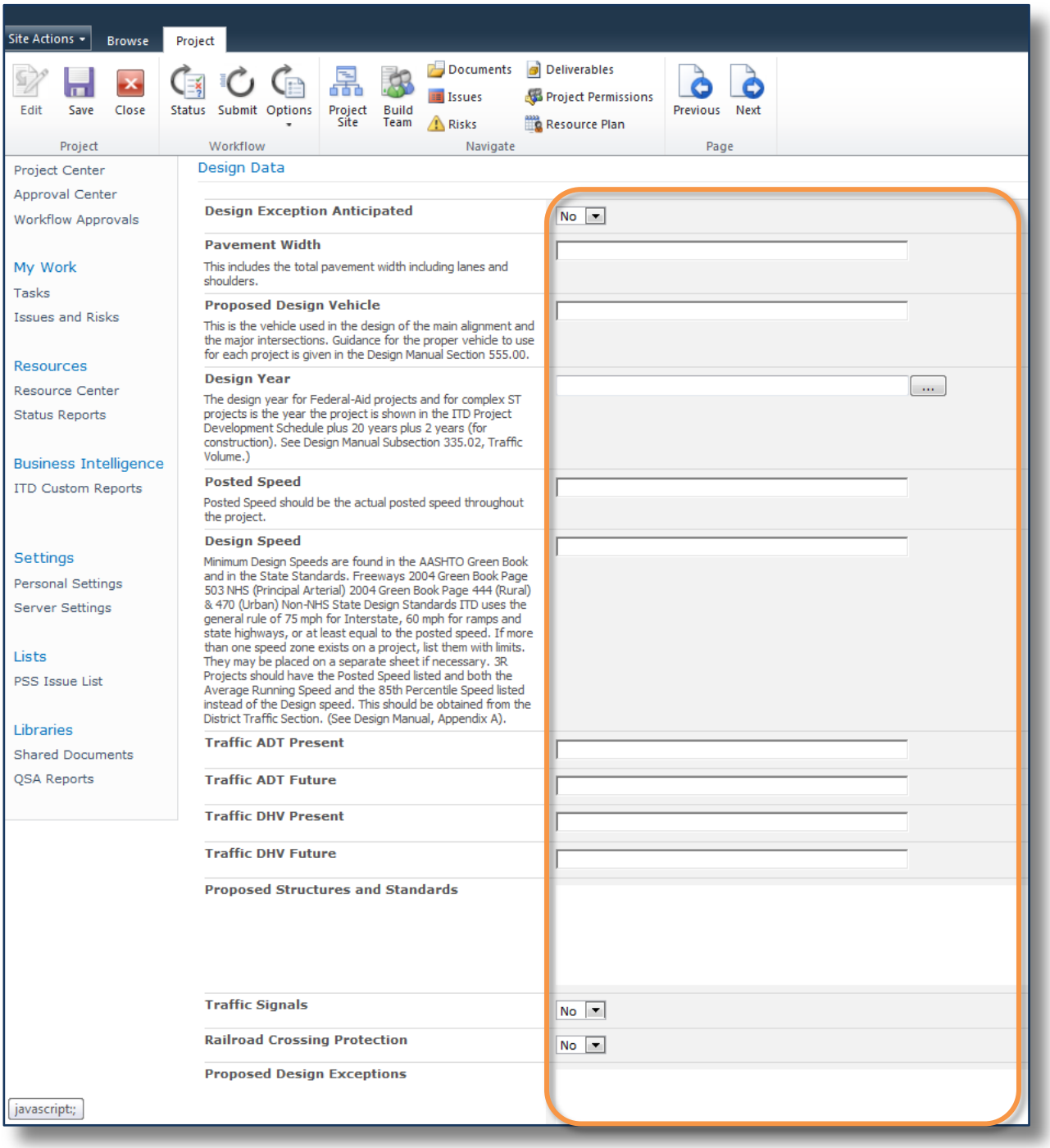
Design Data



Design Exception Anticipated

Select Yes or No by using the Yes/No drop-down  to indicate whether you anticipate design exceptions. If you are unsure what qualifies as a design exception, please refer to the *Design Manual, section 330.00 and Appendix A.10.16.*

Pavement Width
Enter the pavement width (in feet). This includes the total pavement width, including the lanes and shoulders.

Proposed Design Vehicle
Enter the project's proposed design vehicle. This is the vehicle used in the design of the main alignment and the major intersections. Guidance for the proper vehicle to use for each project is given in the *Design Manual Section 555.00*.

Design Year
Enter the project's design year. The design year for Federal-Aid projects and for complex ST projects is the year the project is shown in the ITD Project Development Schedule plus 20 years, plus 2 years (for construction). See *Design Manual Subsection 335.2, Traffic Volume*.

Posted Speed
Enter the project's posted speed. Posted Speed should be the actual posted speed throughout the project.

Design Speed
Enter the project's design speed. Minimum Design Speeds are found in the AASHTO Green Book and in the State Standards. Freeways 2004 Green Book Page 503, NHS (Principal Arterial) 2004 Green Book Page 444 (Rural) & 470 (Urban). Non-NHS State Design Standards ITD uses the general rule of 75 mph for Interstate, 60 mph for ramps and state highways, or at least equal to the posted speed. If more than one speed zone exist on a project, list them with limits. 3R Projects should have the Posted Speed listed and both the Average Running Speed and the 85th Percentile Speed listed instead of the Design speed. This should be obtained from the District Traffic Section. (See *Design Manual, Appendix A.*)

Traffic ADT Present
Enter the current average daily traffic (ADT) for the route of the project.

Traffic ADT Future
Enter the future average daily traffic (ADT) for the route of the project.

Traffic DHV Present
Enter the current design hourly volume (DHV) for the route of the project.

Traffic DHV Future
Enter the future design hourly volume (DHV) for the route of the project.

Proposed Structures and Standards

Refer to the Design Manual, sections 345.00 and 1000.

Traffic Signals

Select Yes or No by using the Yes/No drop-down 

to indicate if the project route contains any traffic signals.

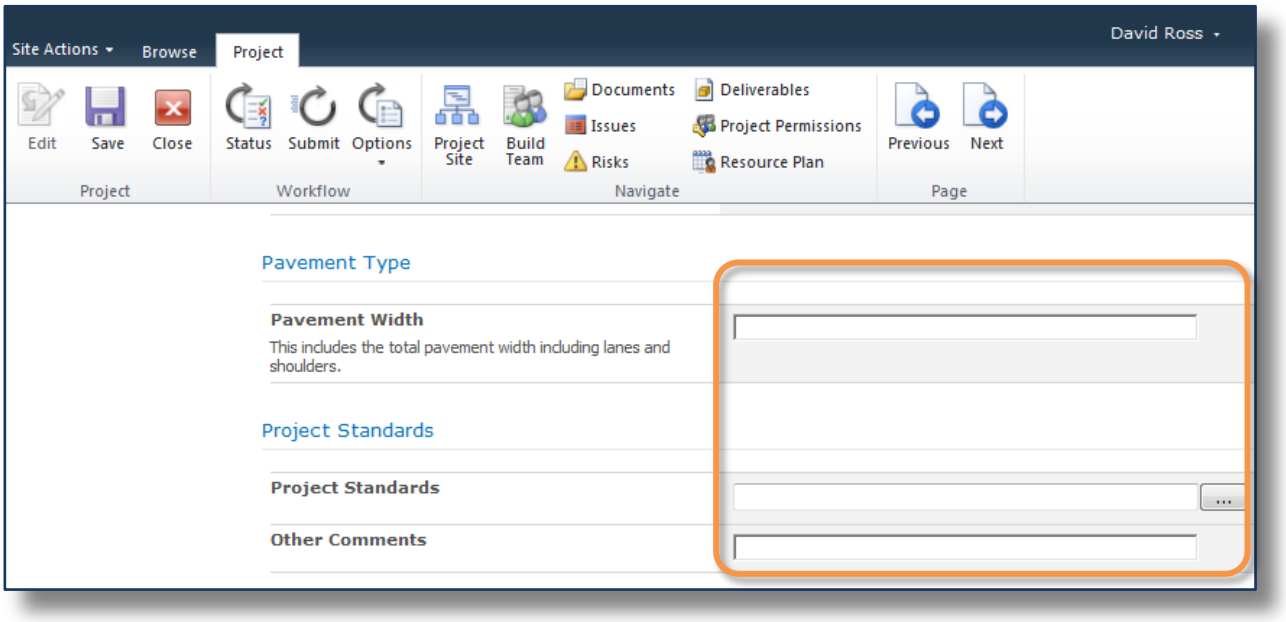
Railroad Crossing Protection

Make note of any railroad crossing protection that currently exists on the project route or any additional railroad crossing protection that will need to be implemented.

Proposed Design Exceptions

Document any proposed design exceptions. You will have the ability to upload any necessary files in the Project Site Lists. Please refer to the "*Design Exceptions"* section for details on how to upload files to the Project Site Lists. If you are unsure what qualifies as a design exception, please refer to the *Design Manual, section 330.00 and Appendix A.10.16.*

Pavement Type and Project Standards



Pavement Width

Enter the pavement width (in feet). This includes the total pavement width, including the lanes and shoulders.

Project Standards

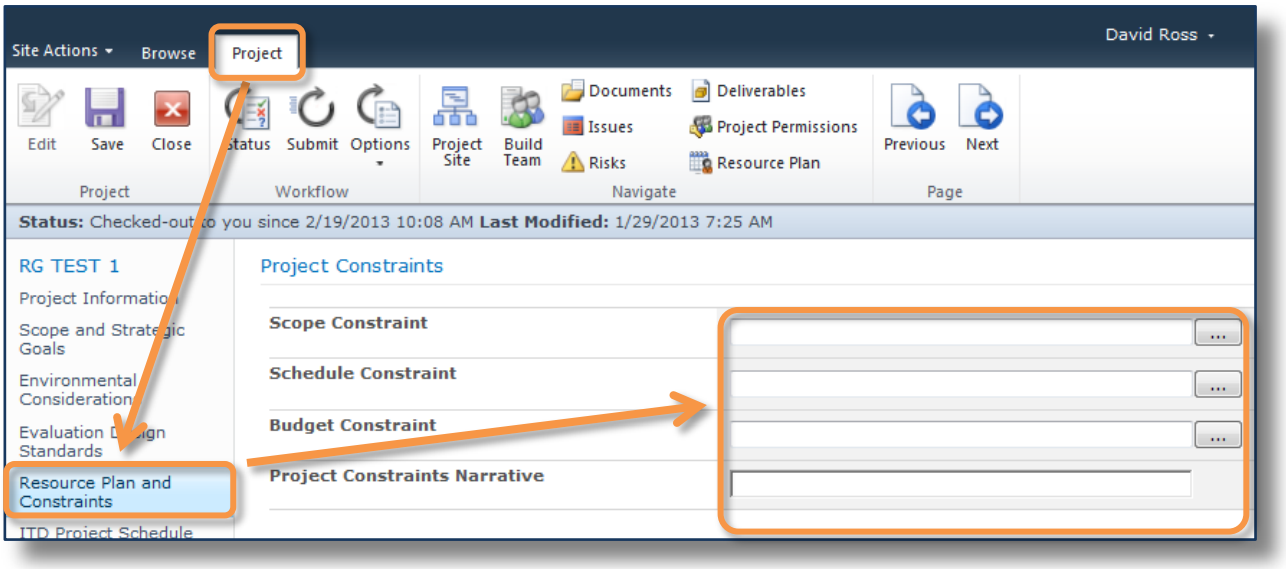
Select from the provided project standards by clicking the ellipses button ... . For further information about project standards, refer to the *Design Manual, sections 320.00 and 510.01.*

Other Comments

Use this field to provide any additional narrative related to the design standards of your project.

Documenting Resource Plan and Constraints

Project Constraints



Scope Constraint

Select the priority for your scope, from High, Medium, or Low, by clicking the ellipses button ....

Schedule Constraint

Select the priority for your schedule, from High, Medium, or Low, by clicking the ellipses button ....

Budget Constraint

Select the priority for your budget, from High, Medium, or Low, by clicking the ellipses button ....

Project Constraints Narrative

Add any additional narrative to accompany your project constraints.

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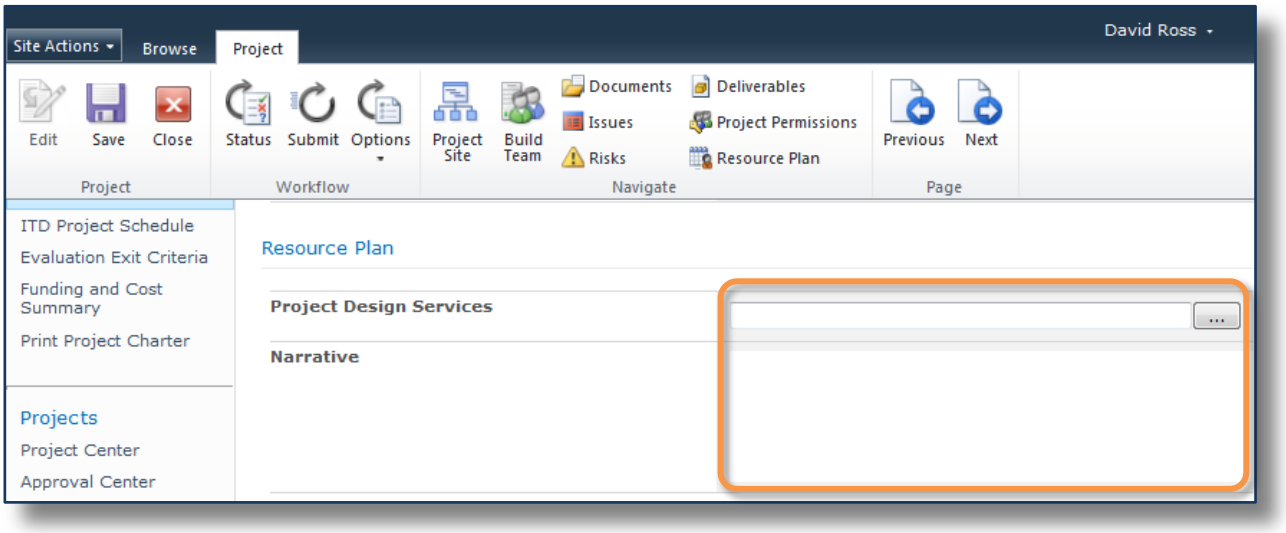
Resource Plan



Project Design Services

Indicate whether the design services for the project will be accomplished in-house, by consultants, or using a combination of both by clicking the ellipses button ....

Narrative

Add any additional narrative to accompany the resource plan of your project.

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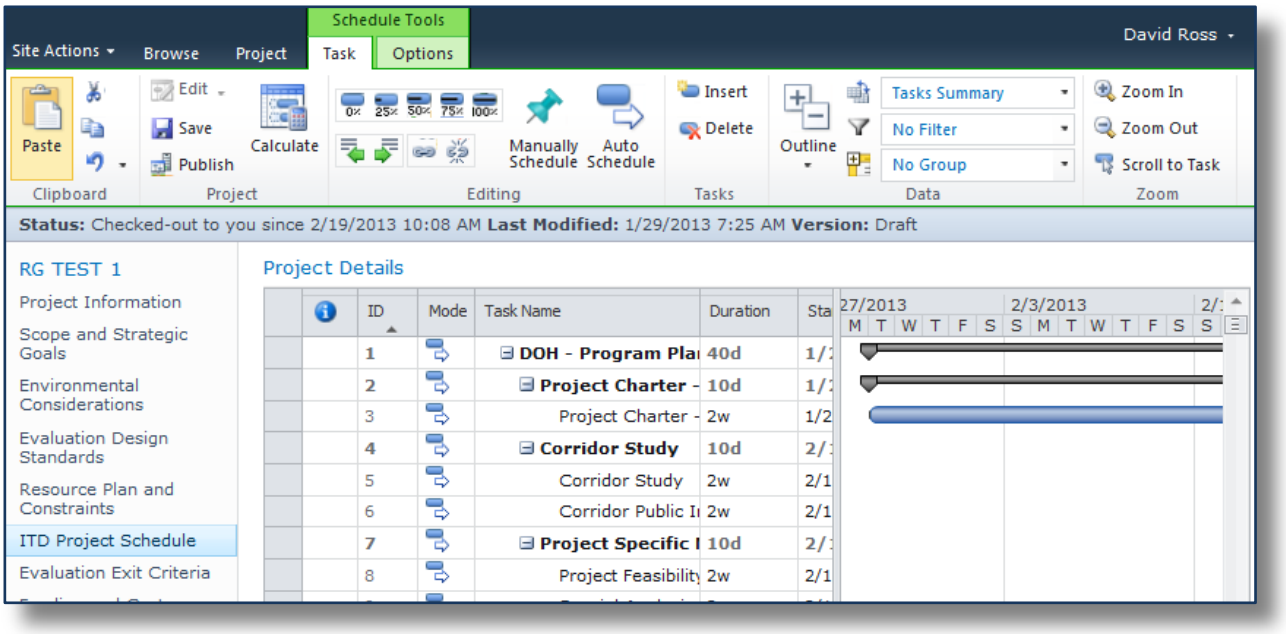
ITD PROJECT SCHEDULE



This page allows you to view your schedule as it was created or updated in Microsoft Project Professional 2010 (MSP). However, if you need to update your project's schedule, you should do so using MSP.

CAUTION: Only Project Managers should make changes to the schedule.

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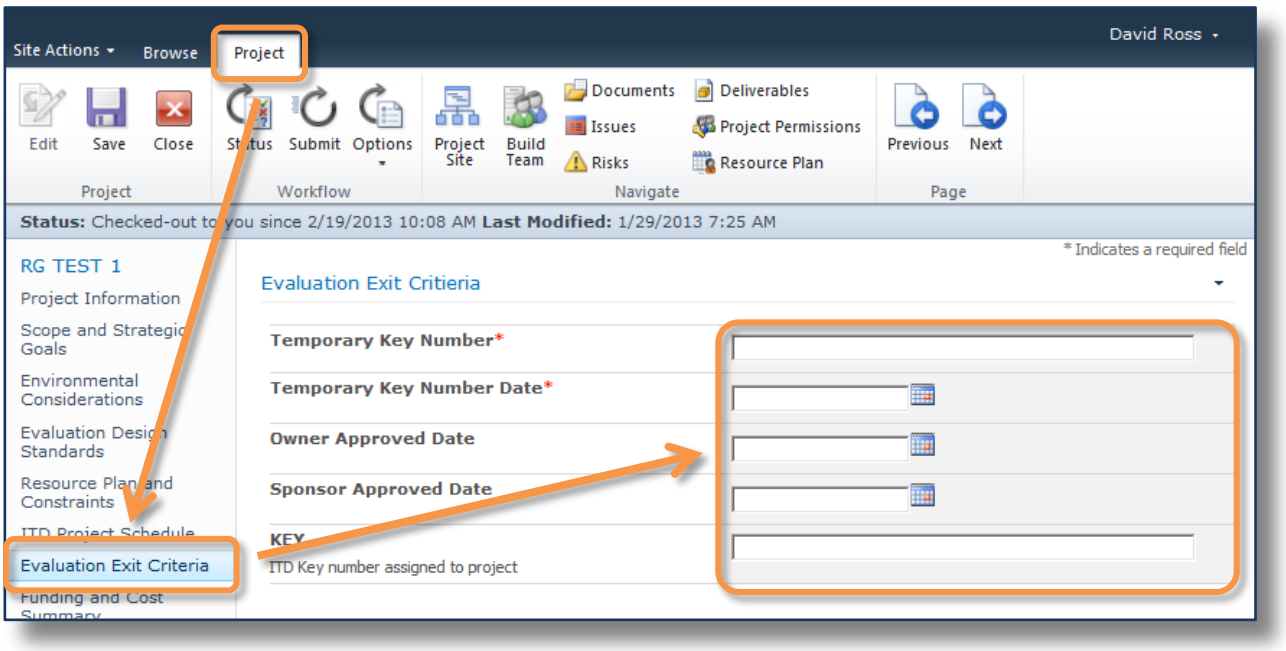
Documenting Exit Criteria

Evaluation Exit Criteria

From the **Project** tab, click **Evaluation Exit Criteria**, and then fill out the **Evaluation Exit Criteria fields** to the right.



Temporary Key Number

Enter the temporary key number that OTI issued for the project.

Temporary Key Number Date

Enter the date OTI issued the temporary key number using the calendar button .

Owner Approved Date

This field should fill out automatically, but if it does not, enter the date the Owner approved the Evaluation Phase charter using the calendar button .

Sponsor Approved Date

This field should fill out automatically, but if it does not, enter the date the Sponsor approved the Evaluation Phase charter using the calendar button .

KEY

This field should fill out automatically after the project is issued a key number.

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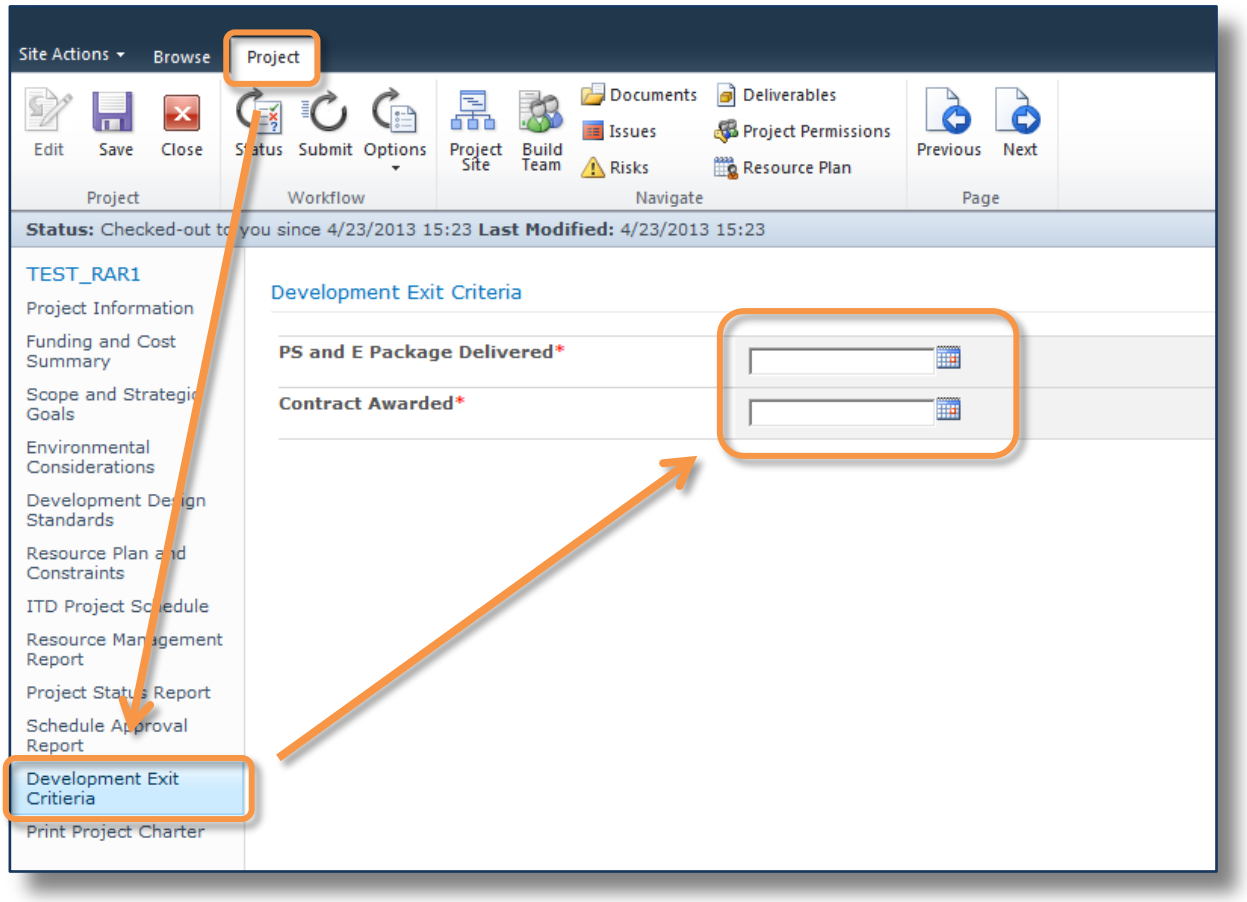
Development Exit Criteria

From the **Project** tab, click **Development Exit Criteria**, and then fill out the **Development Exit Criteria fields** to the right.



PS and E Package Delivered

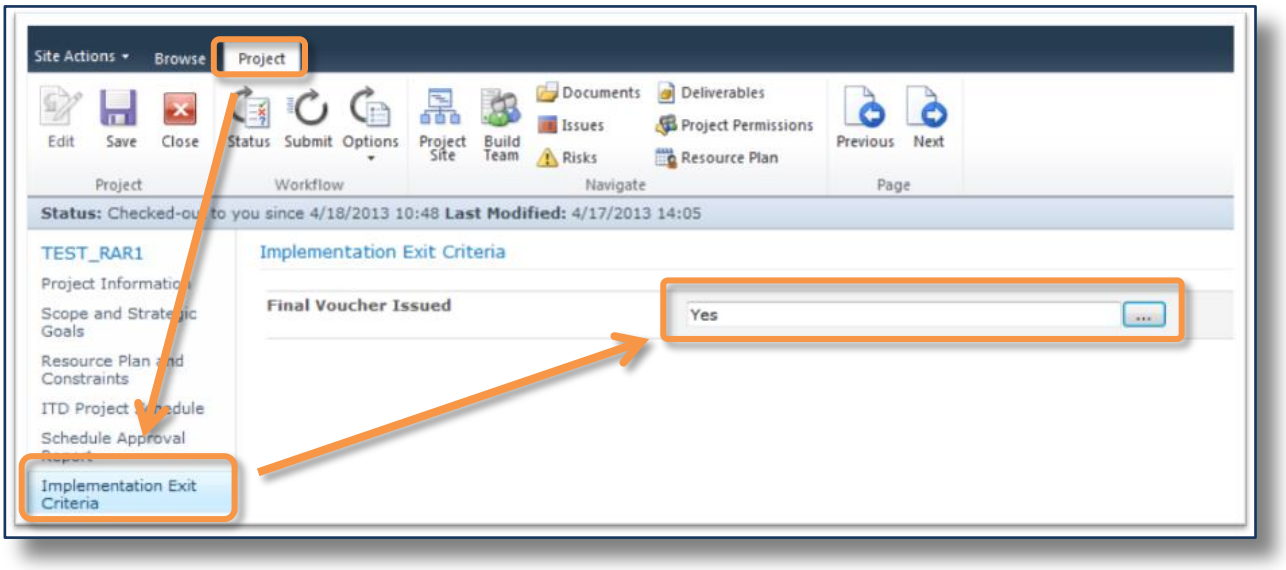
Enter the date the PS&E package was delivered using the calendar button.

Contract Awarded

Enter the date the contract was awarded using the calendar button

Implementation Exit Criteria

From the **Project** tab, click **Implementation Exit Criteria**, and then fill out the **Implementation Exit Criteria field** to the right.



Final Voucher Issued

Use the ellipses button ... to indicate whether the final voucher has been issued.

PROJECT SITE LISTS

All of these functions are performed from the project's Project Site, which can be accessed by opening the project in PWA and then clicking **Project Site**. With the Project Site Lists, you will be able to archive all documentation and information associated with the project that isn't included in the charter.

STAKEHOLDERS

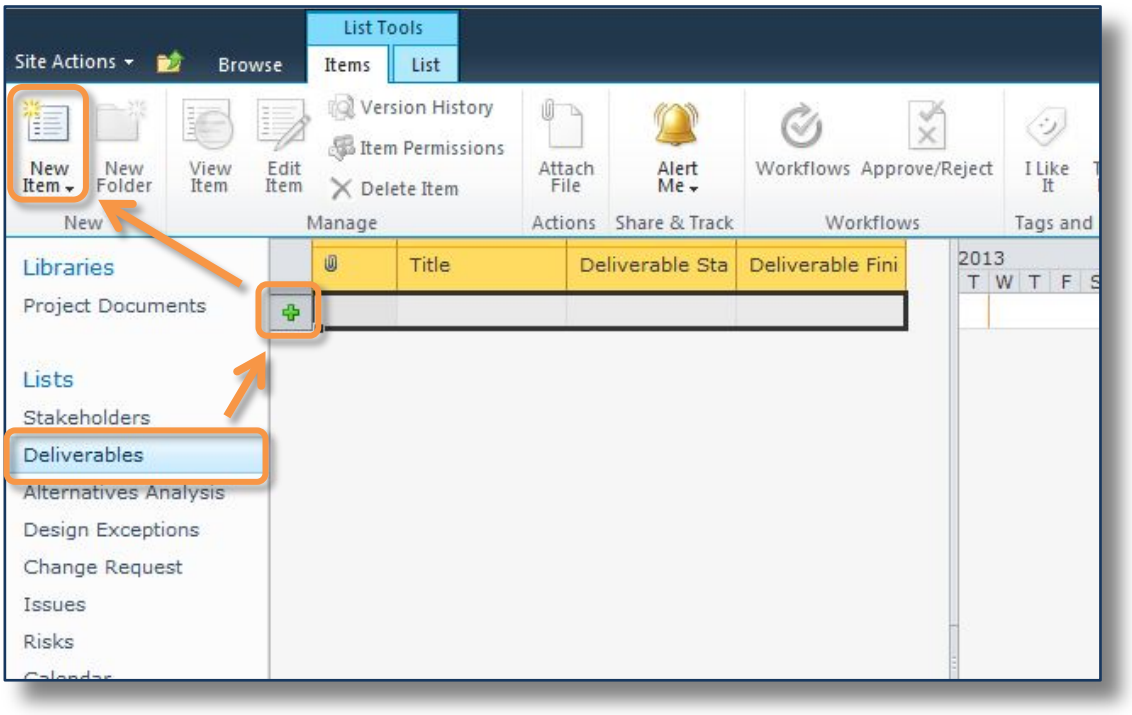
Please refer to *Creating a Stakeholder List* under *Main Functions*.

DELIVERABLES

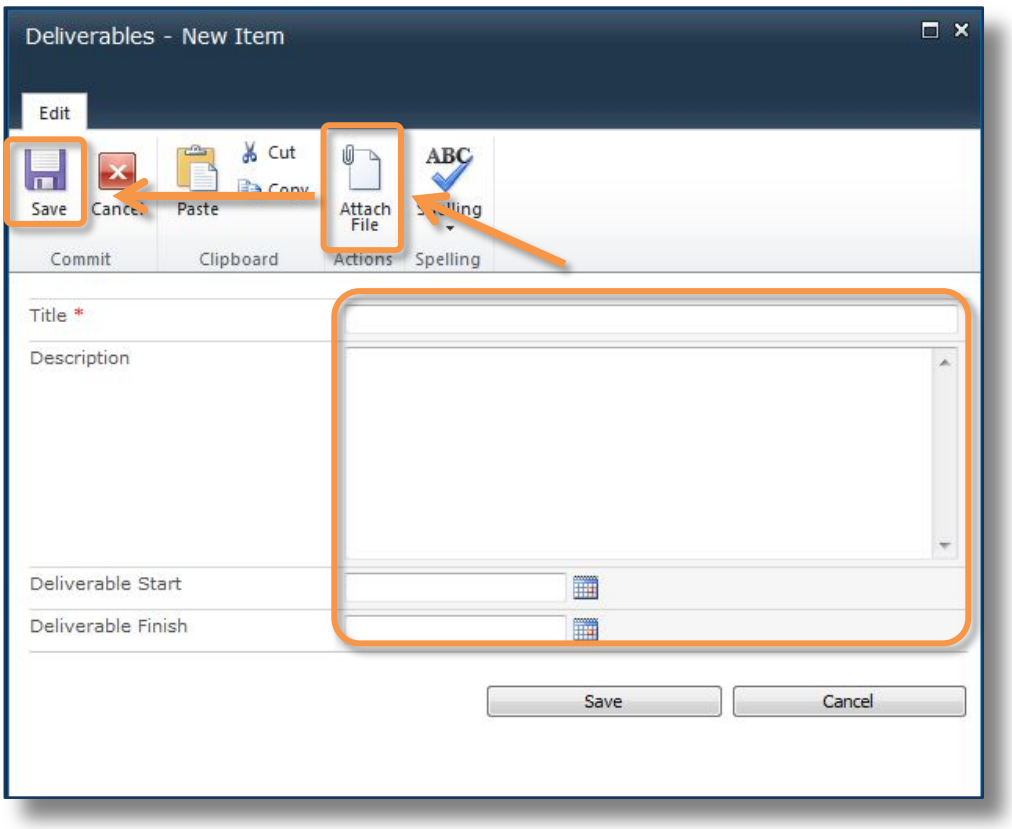
Use the Deliverables list to communicate key deliverables and dates. These can be linked with Microsoft Project Professional 2010 (MSP).

Creating Deliverables in PWA

1. **Create a new deliverable item.** Click **Deliverables**, and then click the **green plus sign**. Then, click **New Item** to add a new deliverable.



2. **Enter deliverable information**. The deliverable must have a **Title** and may also have a **Description.** Be sure to enter deliverable start and finish dates using the calendar buttons provided, if necessary. Then, use the **Attach File** button to attach the deliverable file (report, analysis, study, etc.). Once the file is attached and the information has been updated into the fields provided, click **Save.**



Creating Deliverables in MSP

1. **Create a deliverable in a specific task.** Select the **task** you wish to add a deliverable to. Then, click the **Deliverables** drop-down menu and select **Create Deliverables.** This will create a deliverable linked with that specific task. *(Graphic on following page.)*

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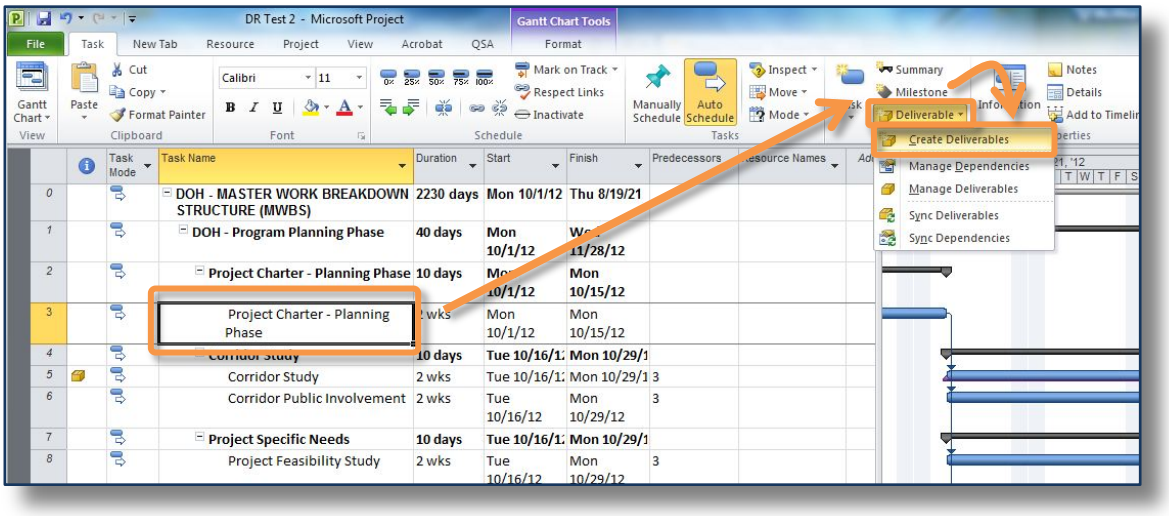
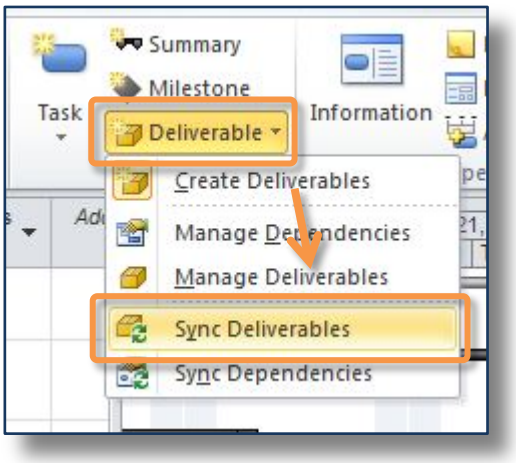


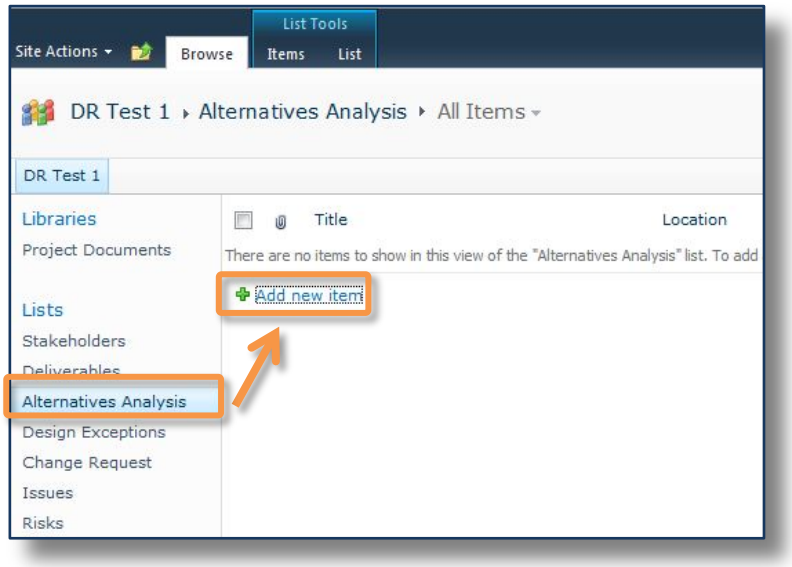
2. **Sync deliverables with the Project Site.** When you have finished creating a deliverable in MSP, click the **Deliverables** drop-down menu and select **Sync Deliverables**. This will synchronize all new deliverables with the Project Site.



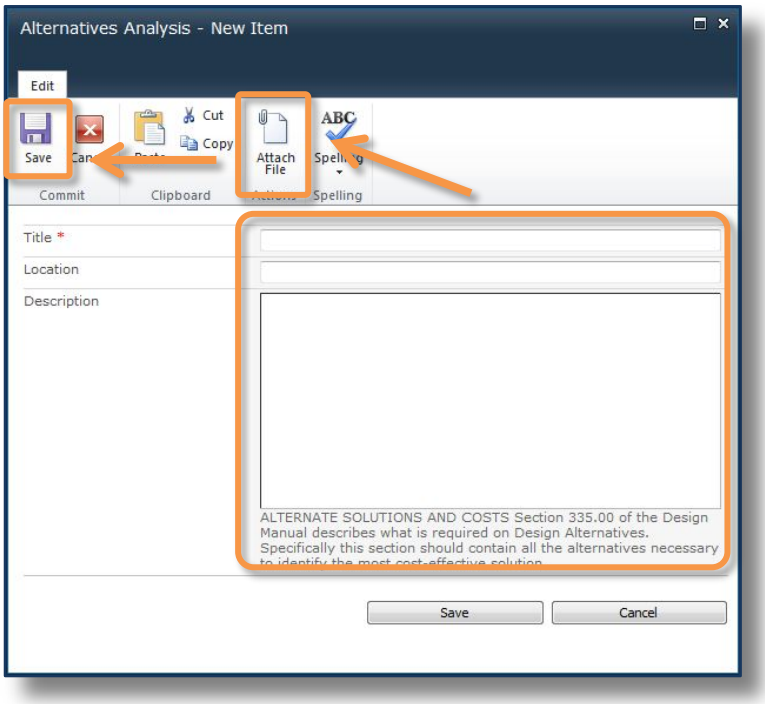
ALTERNATIVES ANALYSIS

Use this section to document your alternatives analysis. For further clarification on what an alternatives analysis should include, please see the *Design Manual, section 335.00.*

1. **Create a new alternatives analysis item.** Click **Alternatives Analysis**, and then click **Add new Item.**



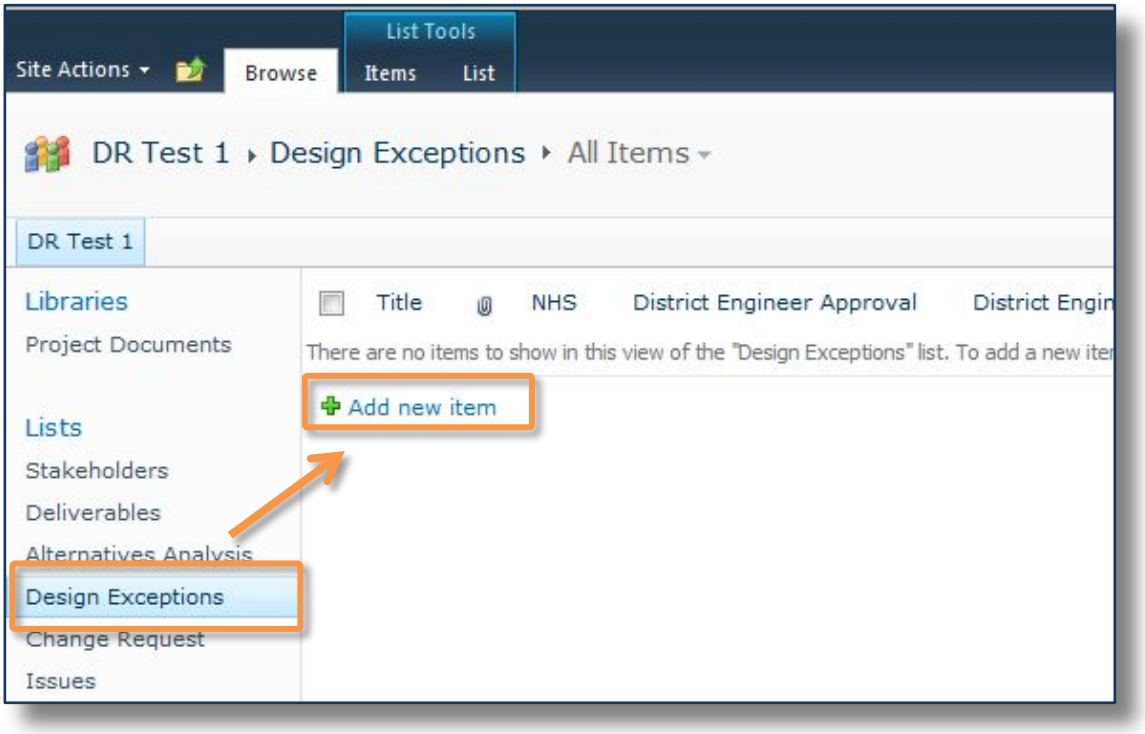
2. **Enter alternatives analysis information.** Enter a **Title** for the alternatives analysis. Then, enter the location and a description in the **fields provided.** Attach any additional or supplementary files using the **Attach File** button. Once the information has been updated into the fields provided, click **Save.**



Design Exceptions

Use this section to document any design exceptions associated with your project. For further information about design exceptions, please refer to the *Design Manual, section 330.00 and Appendix A.10.16.*

1. **Create a new design exceptions item.** Click **Design Exceptions**, and then click **Add new Item.**



2. **Enter design exceptions information.** Enter a **Title** for the design exceptions. Then, include all relevant information for the design exceptions using the **fields provided.** Attach any additional or supplementary files using the **Attach File** button. Once the file is attached and the information has been updated into the fields provided, click **Save.** *(Graphic on following page.)*

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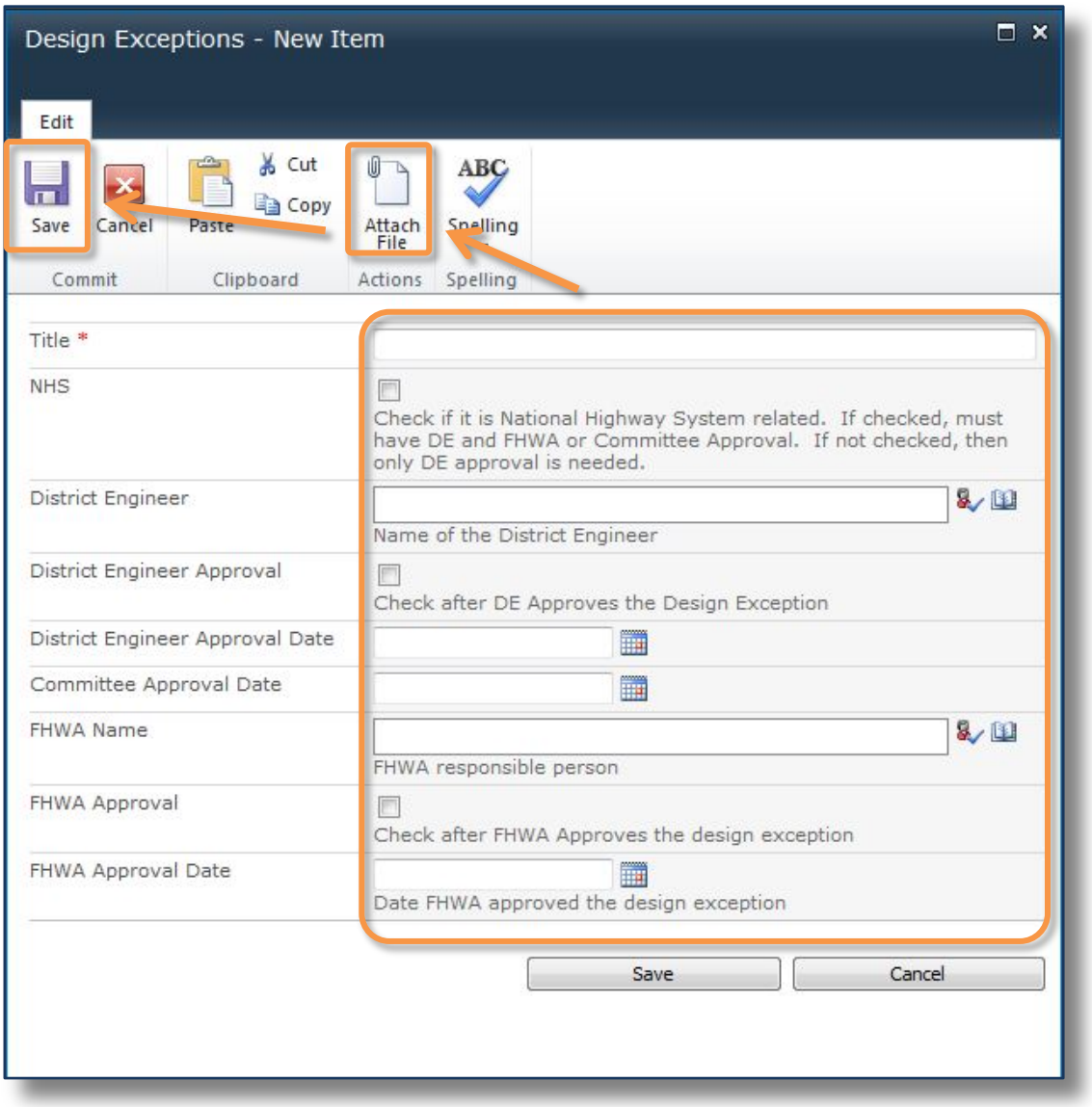
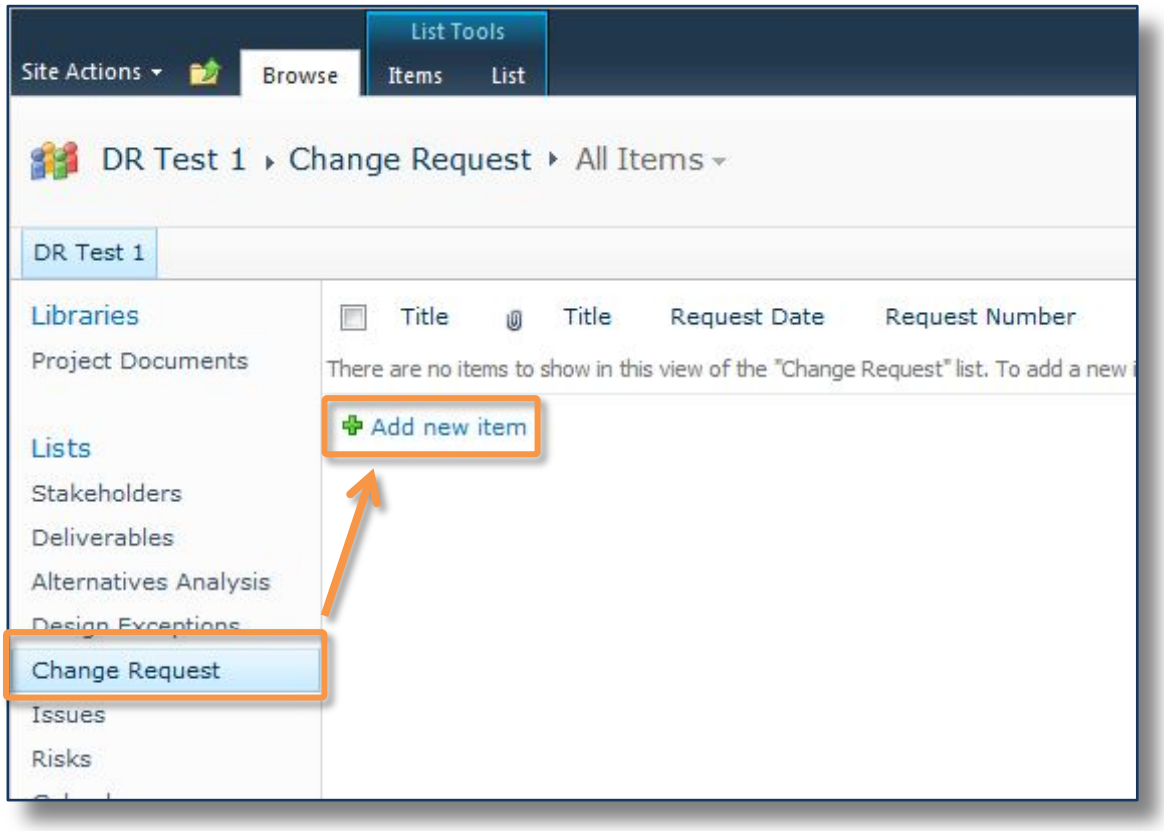


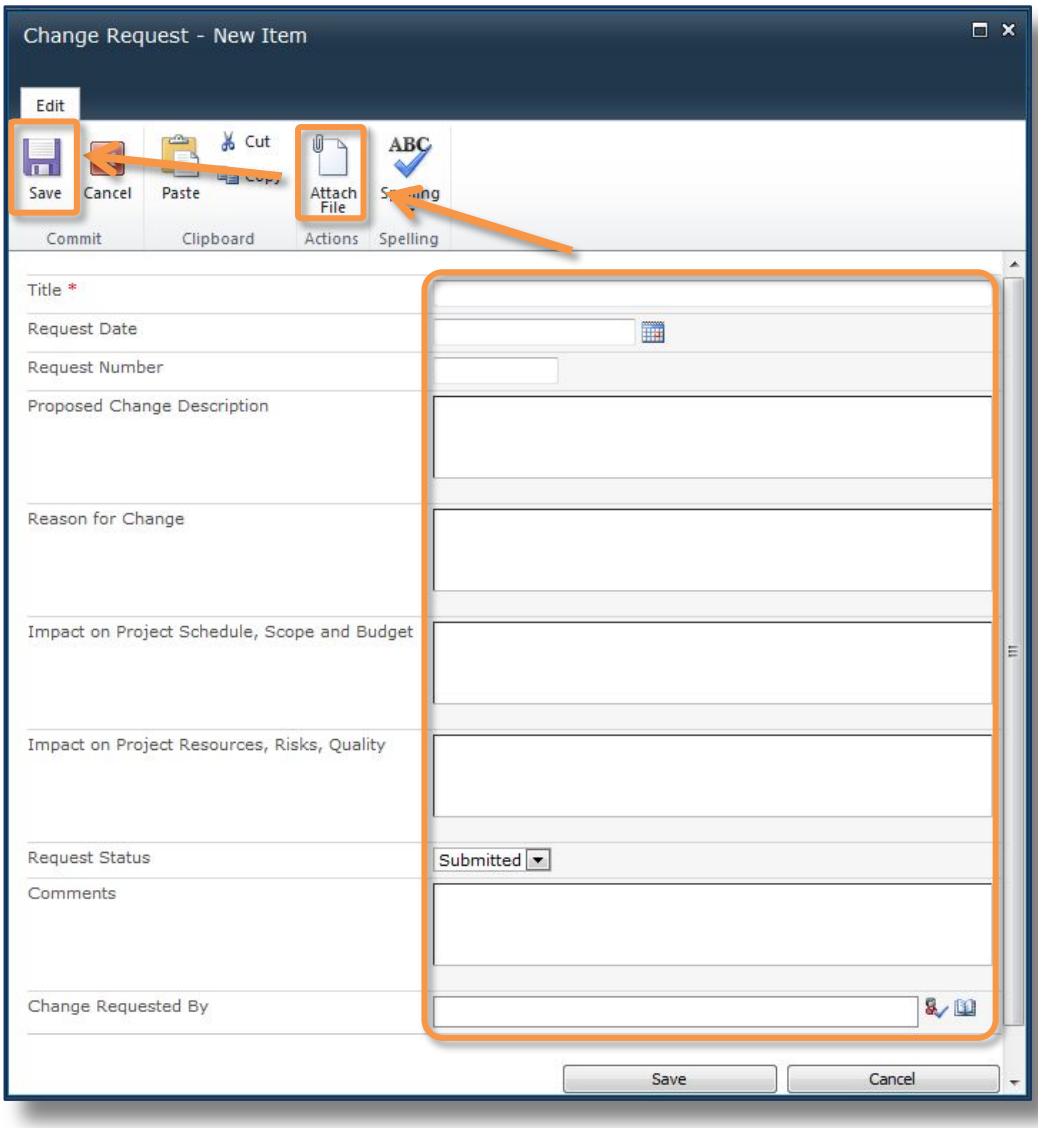
CHANGE REQUEST

Changes to the scope, schedule and budget can be managed through the Charter Change Request process. These changes will also need to be separately documented in the project charter.

1. **Create a new change request item.** Click **Change Request**, and then click **Add new Item.**



2. **Enter change request information.** Enter a **Title** for the change request. Then, use the following **fields provided** to enter the change request information. Leave the "Request Status" field as "Submitted." Attach any additional background or supplementary files using the **Attach File** button. When all information is updated, click **Save.** *(Graphic on following page.)*

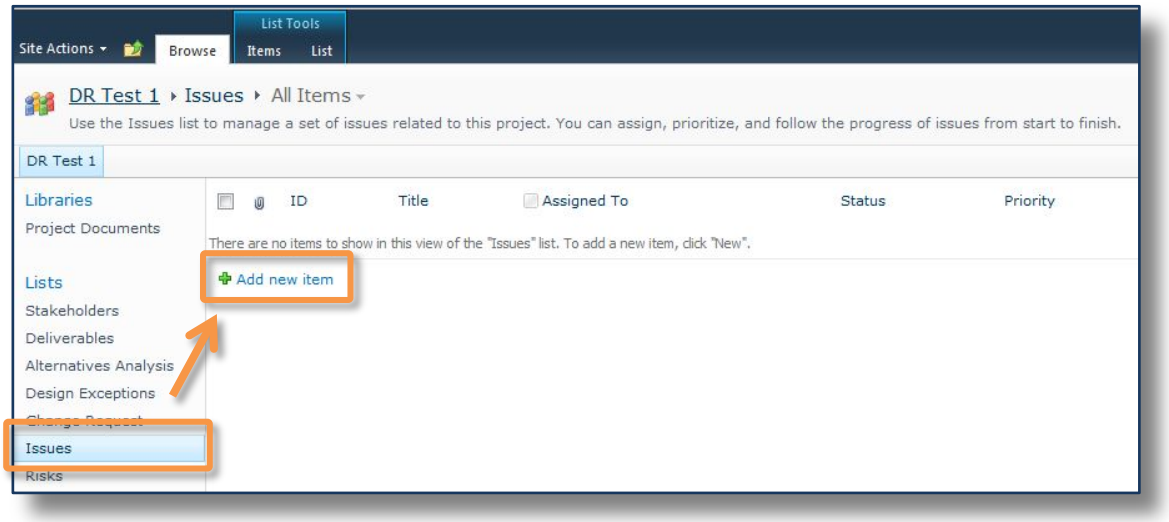


NOTE: After you have submitted a change request, an email will be sent to the Project Owner and Sponsor with a link to the change request on the Project Site. The Project Sponsor will then need to change the "Request Status" field to either "Approved" or "Denied."

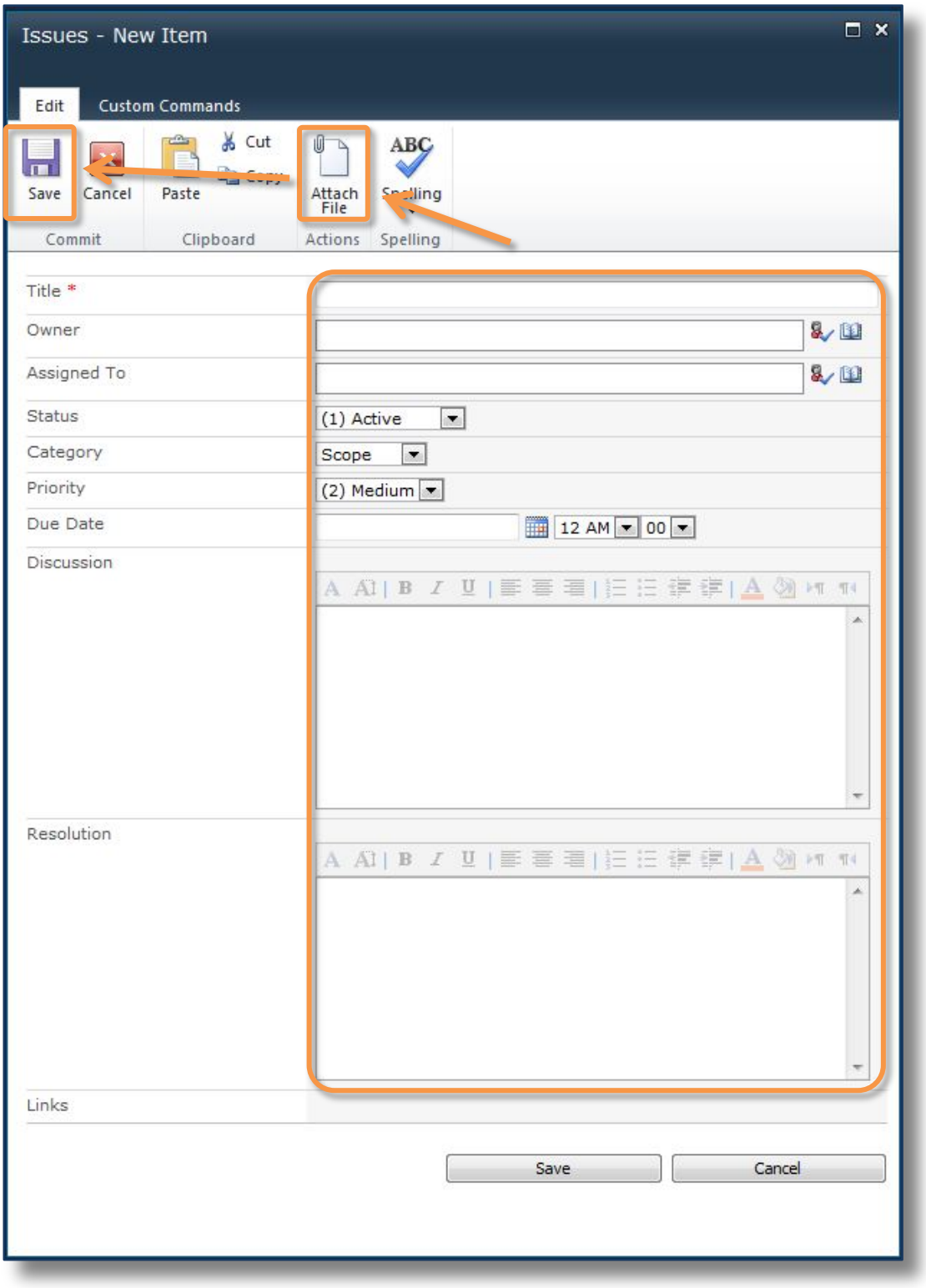
ISSUES

An issue is a point or matter in question or in dispute. There is usually a current discussion with opposing viewpoints based around an issue. Use the Issues list to manage a set of issues related to this project. You can assign, prioritize, and follow the progress of issues from start to finish. The Issues list is a great tool because it helps you keep track of issues that come up during your project and lets you keep a record of your resolutions to those issues.

1. **Create a new issues item.** Click **Issues**, and then click **Add new Item.**



2. **Enter issue information.** Enter a **Title** for the issue. Then, use the **fields provided** to fill out the information about the issue and the resolution. Attach any additional or supplementary files using the **Attach File** button. When all information is updated, click **Save.** *(Graphic on following page.)*

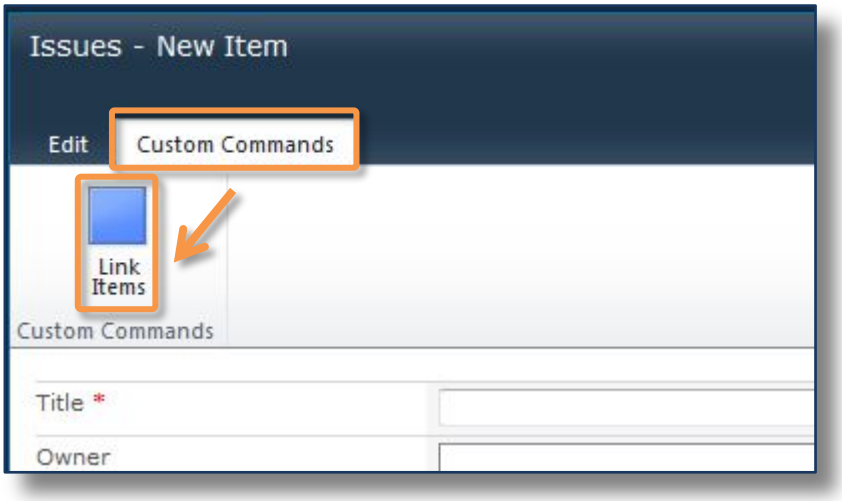


NOTE: You can also link an issue to a specific task(s) using the **Custom Commands** button. *(Graphics on following pages.)*

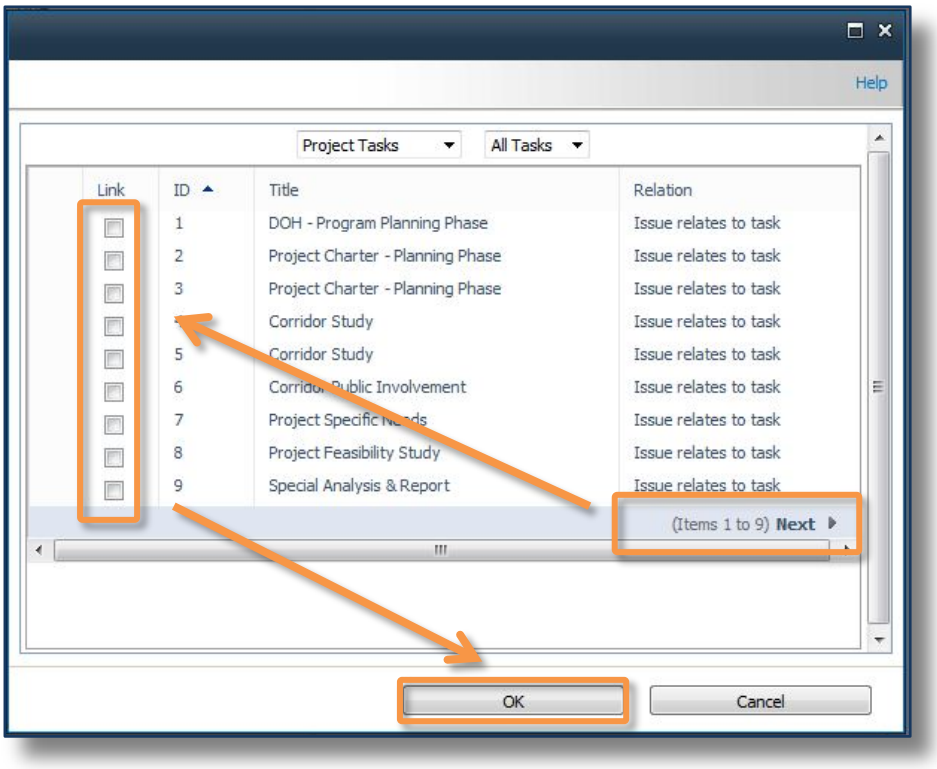
Linking an issue to a task

1. **Follow steps 1 and 2 for create an issues list item.** Do not click **Save**.

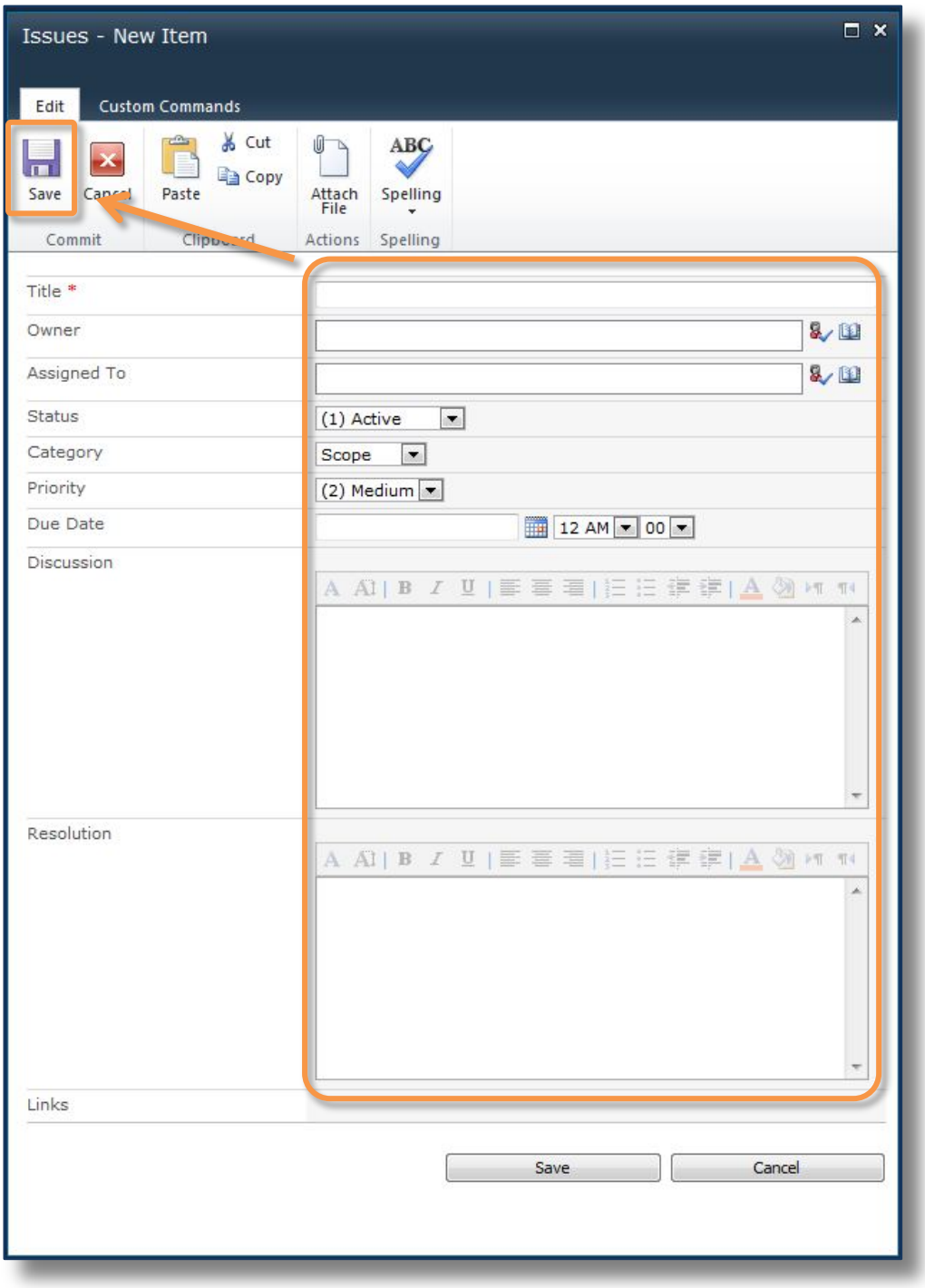
2. **Link the items.** Click **Custom Commands** and then click **Link Items.**



3. **Select a task(s) to link to.** Use the **page navigation buttons** and then use the **check box(es)** to link to a specific task(s). Then, click **OK**.



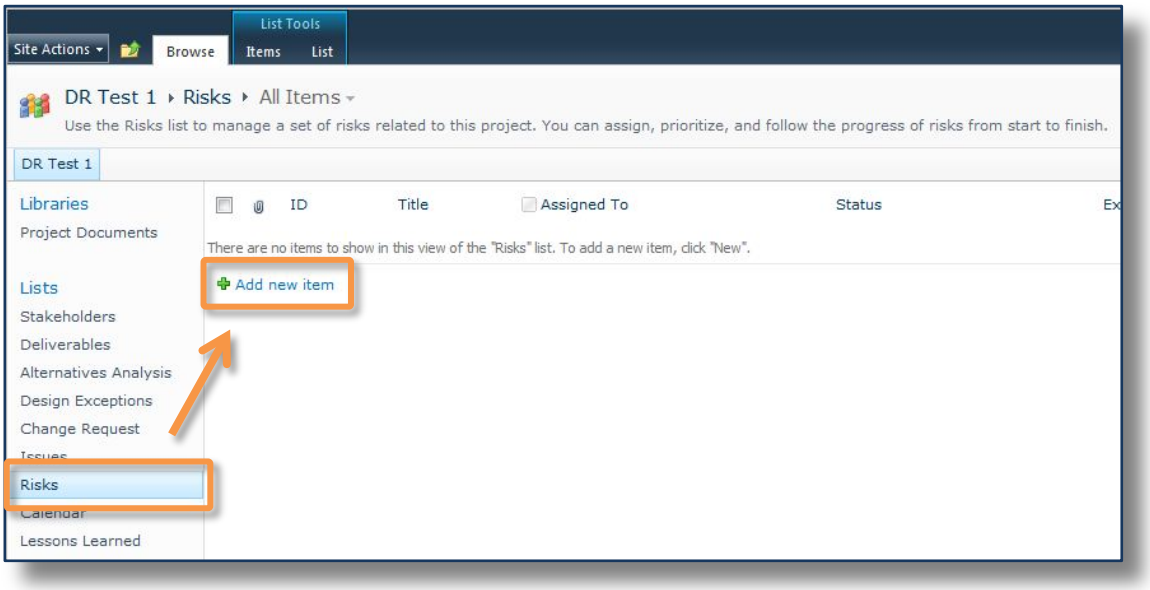
4. **Verify and save.** Verify that all of the information in the fields is correct, then click **Save** to save the issues list item.



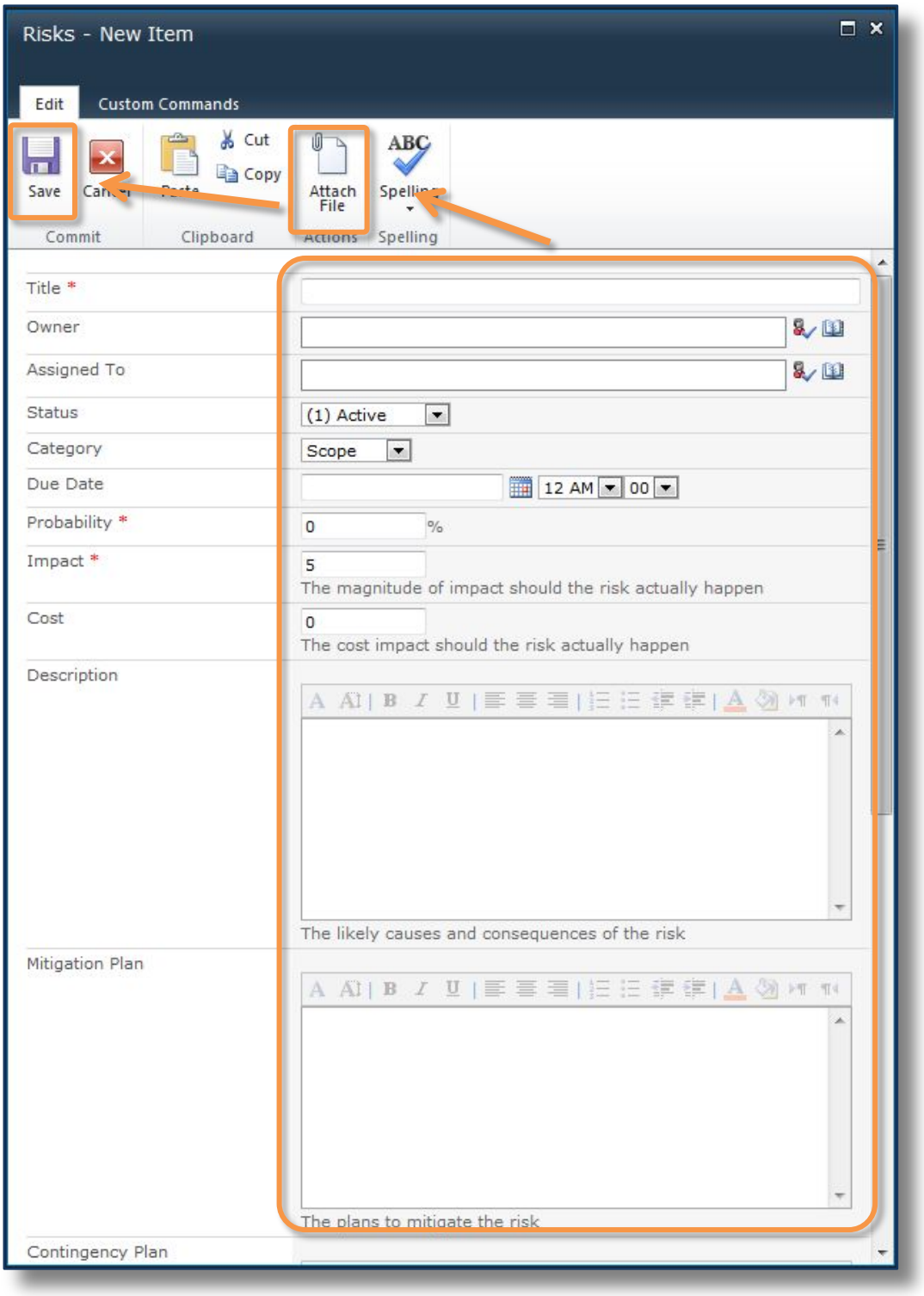
RISKS

A risk is an event that could have a negative impact on a project. Use the Risks list to manage a set of risks related to this project. You can assign, prioritize, and follow the progress of risks from start to finish.

1. **Create a new risks item.** Click **Risks**, and then click **Add new Item.**



2. **Enter risk information.** Enter a **Title** for the risk. Then, you can use the **fields provided** to fill out the information about the risk and the mitigation plan. Attach any additional or supplementary files using the **Attach File** button. When all information is updated, click **Save.** *(Graphic on following page.)*

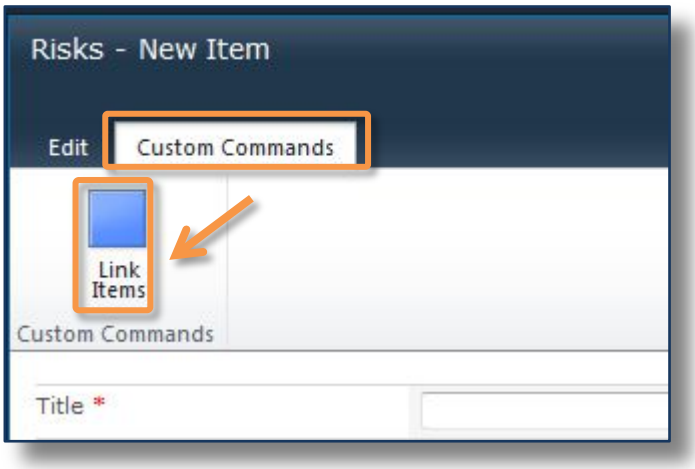


NOTE: You can also link a risk to a specific task(s) using the **Custom Commands** button. *(Graphics on following pages*.)

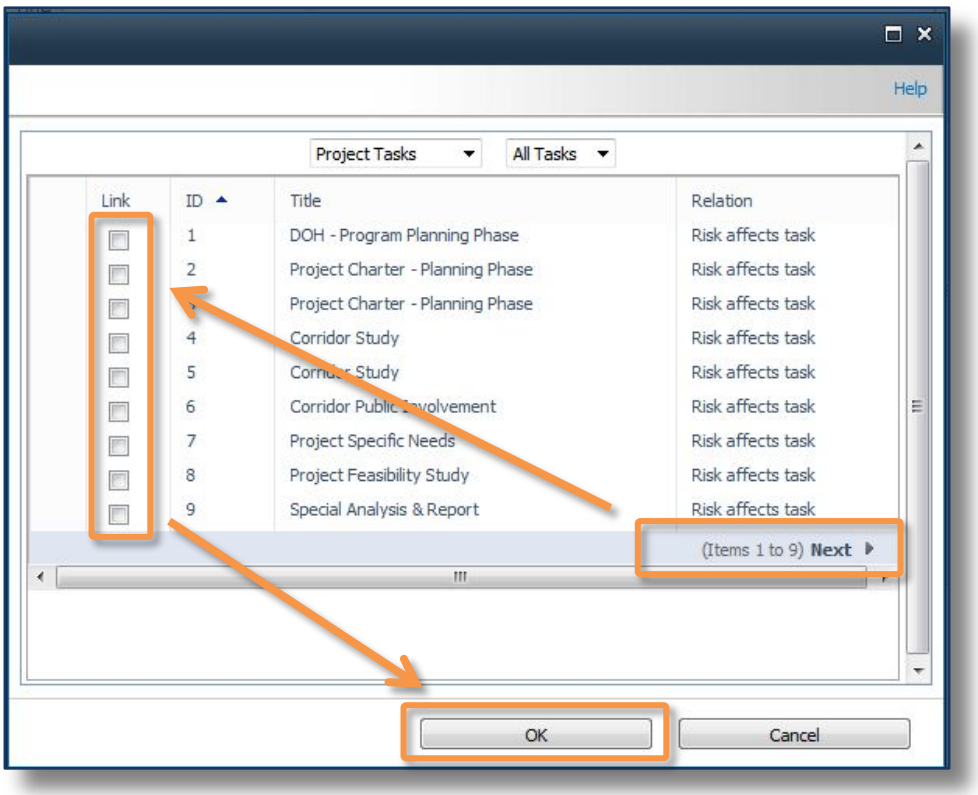
Linking a risk to a task

1. **Follow steps 1 and 2 for creating a new risk item.** Do not click **Save.**

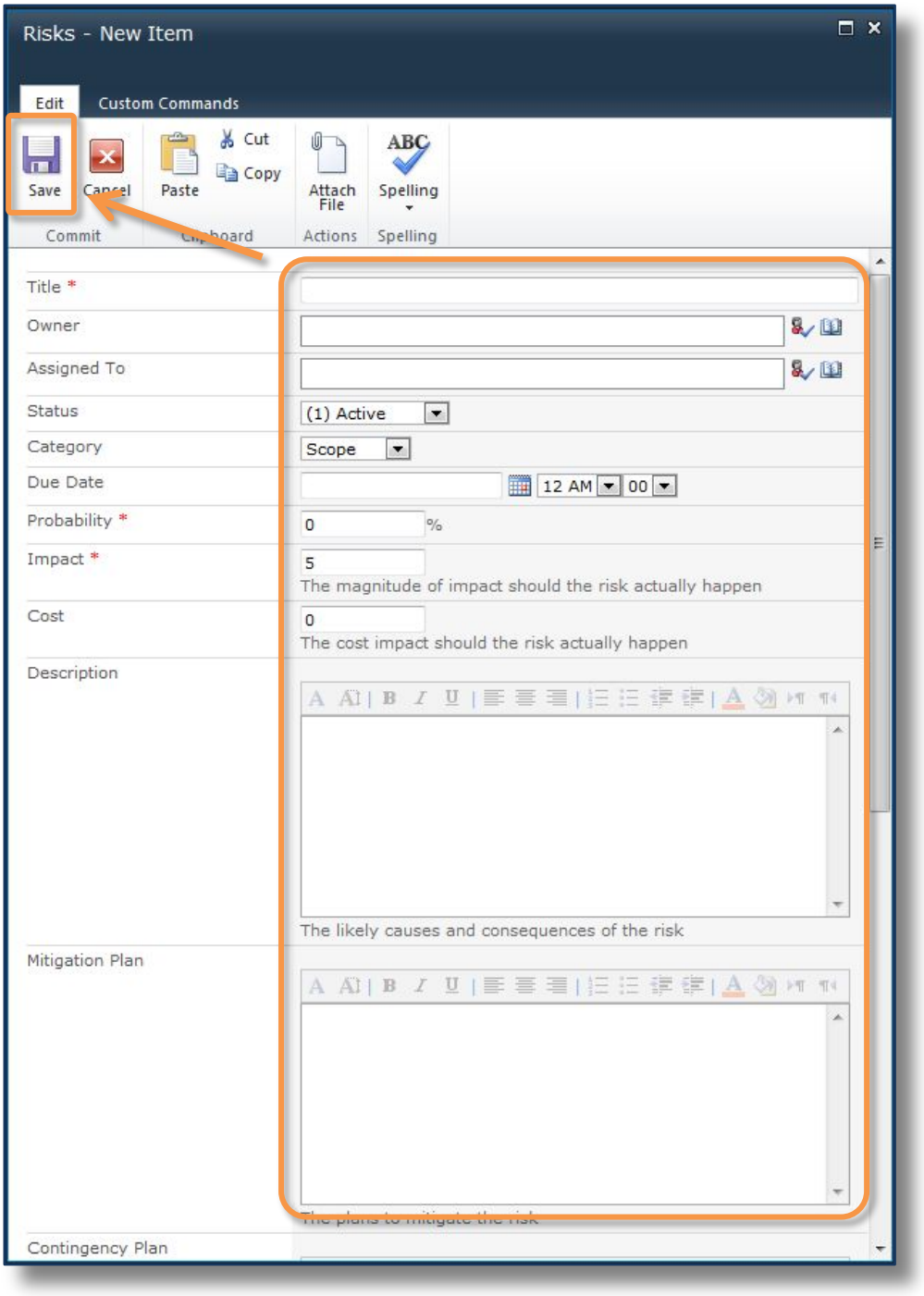
2. **Link the items.** Click **Custom Commands** and then click **Link Items.**



3. **Select a task(s) to link to.** Use the **page navigation buttons** and then use the **check box(es)** to link to a specific task(s). Then, click **OK**.



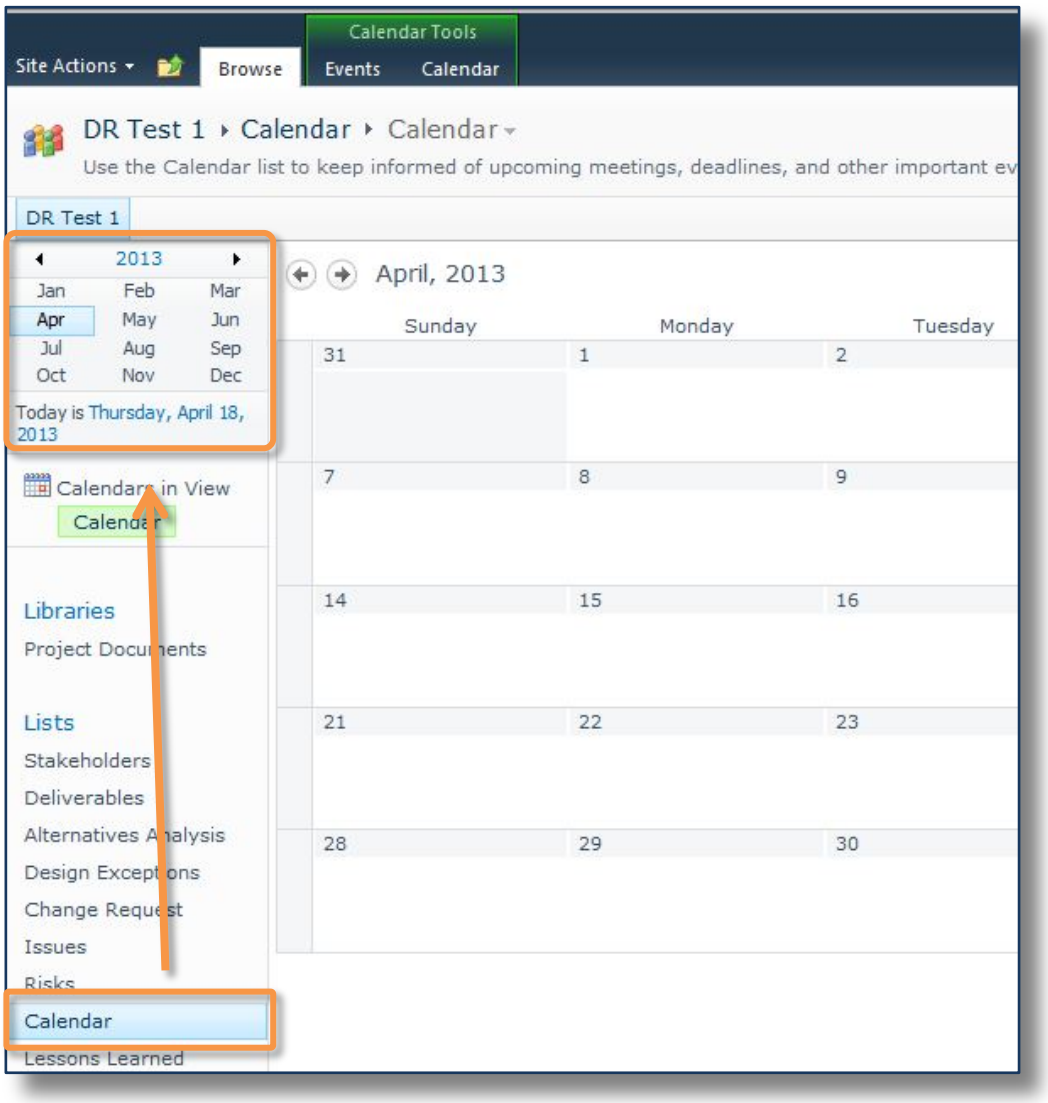
4. **Verify and save.** Verify that all of the information in the fields is correct, then click **Save** to save the risk item.



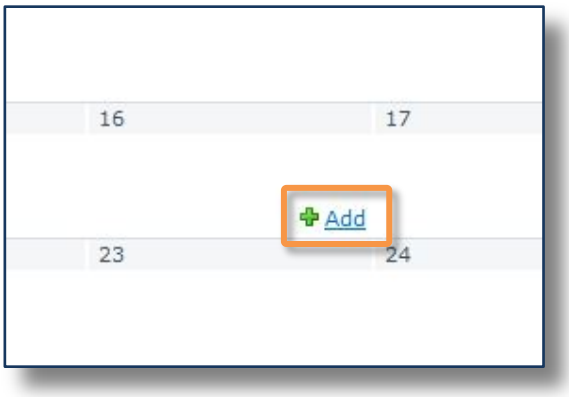
CALENDAR

Use the Calendar list to keep informed of upcoming meetings, deadlines, and other important events. This calendar is available for all team members and stakeholders on the project.

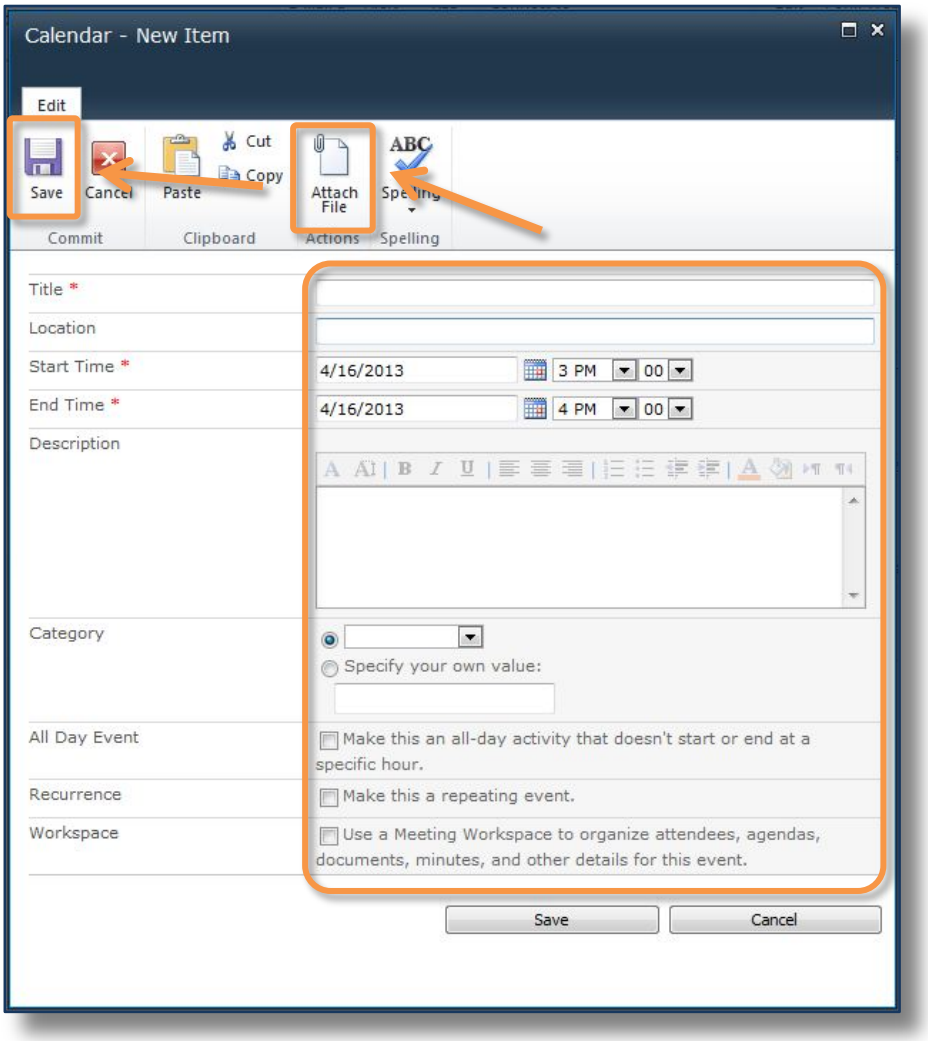
1. **Open the calendar to the month and year desired.** Click Calendar, and then navigate to the month and year you wish to schedule a calendar event using the **calendar tool** in the upper-left corner.



2. **Add a calendar event to a specific day.** Hover your mouse over the specific day you want to add a calendar event to, and then click **Add.** *(Graphic on following page.)*



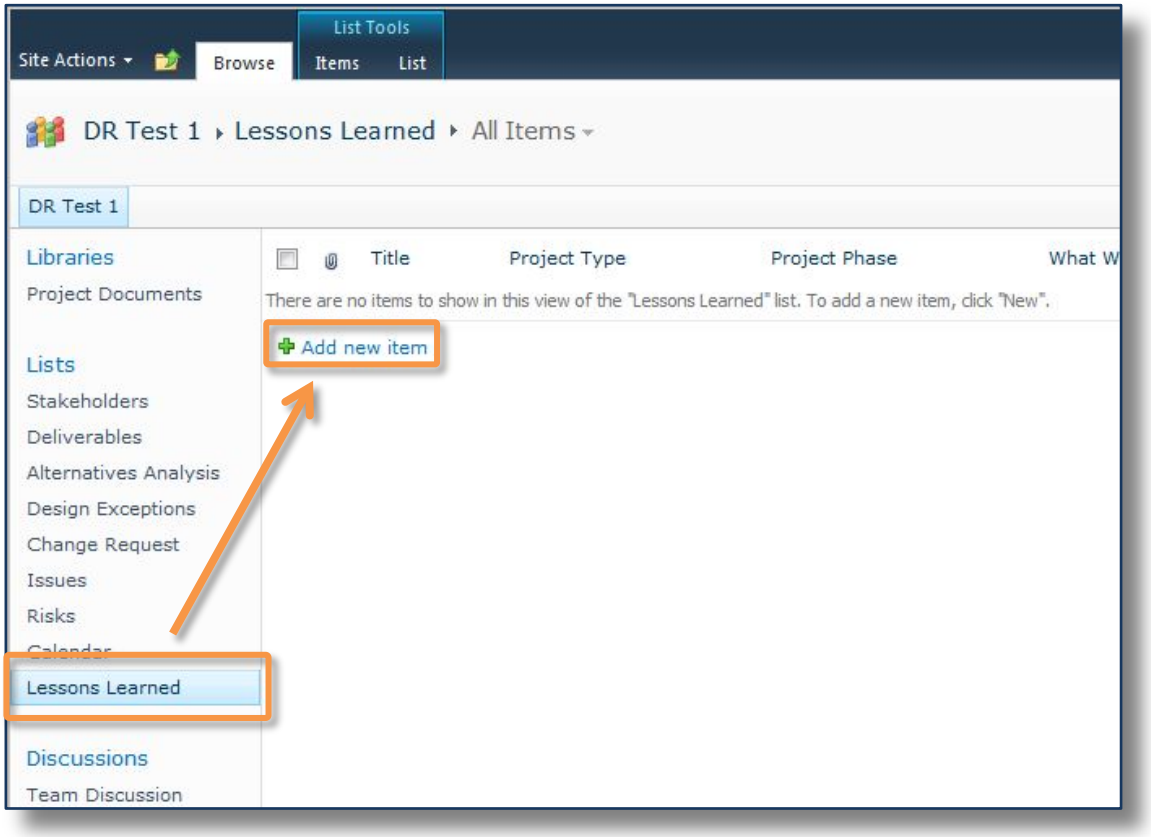
3. **Enter calendar event information.** Enter a **Title** for the calendar event. Then, add all the information for the event in the **fields provided**, including the **Start Time** and **End Time**. Attach any additional or supplementary files using the **Attach File** button. Once all information is updated, click **Save.**



LESSONS LEARNED

Use the Lessons Learned page to document what went well and what could have gone better. You should be entering a lessons learned item at the end of each phase, but you may enter them at any time throughout the life of the project.

1. **Create a new lessons learned item.** Click **Lessons Learned**, and then click **Add new Item.**



3. **Enter lessons learned information.** Enter a **Title** for the lessons learned item. Then, you can use the **fields provided** to fill out the information about the lessons learned. Attach any additional or supplementary files using the **Attach File** button. When all information is updated, click **Save.** *(Graphic on following page.)*

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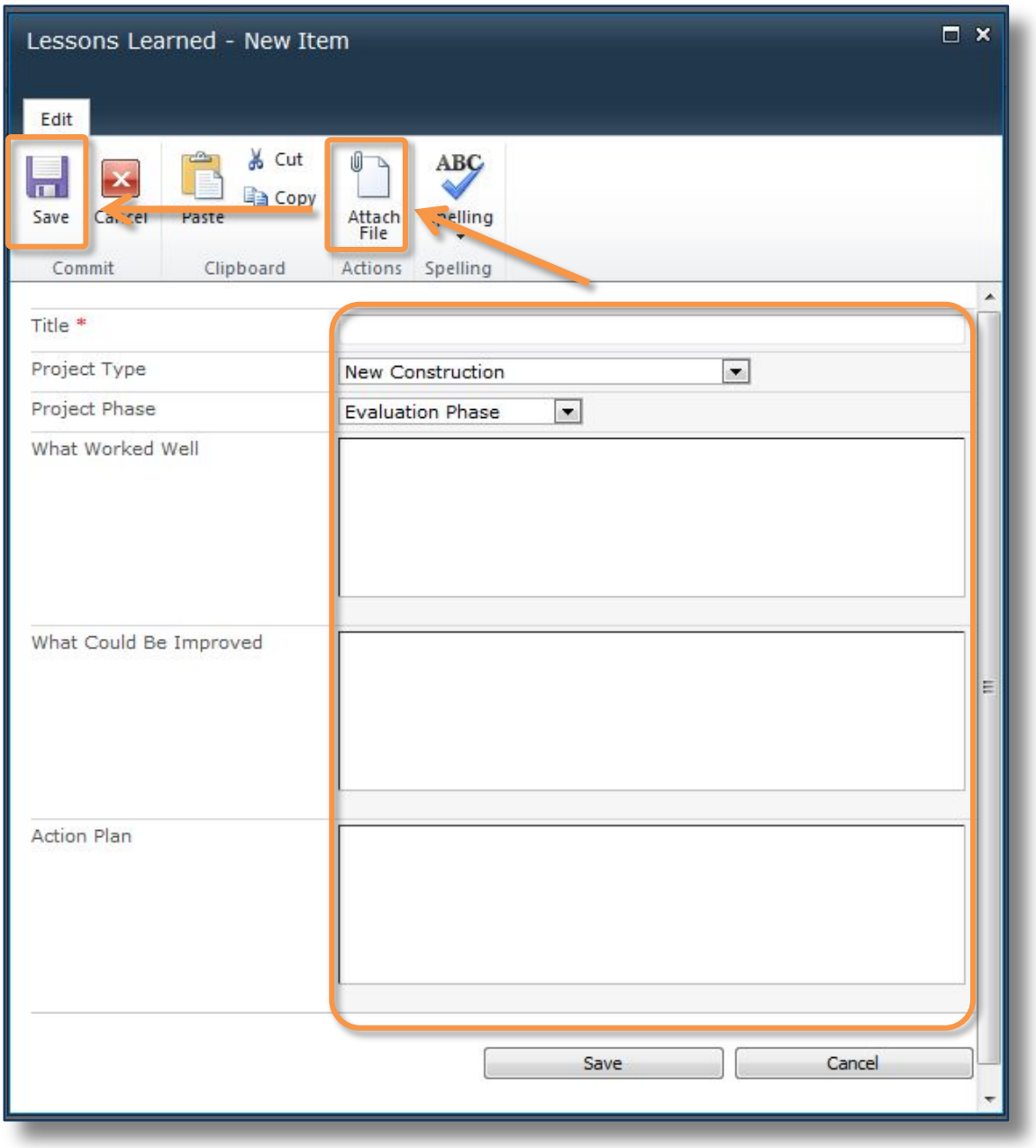

APPENDICES

APPENDIX A: PROJECT CHARTER SAMPLES

This section shows examples of current project charters and test charters for various project types. These are examples of what the project detail pages (PDPs) will look like with information filled in. Since different Project Managers have varying writing styles and varying approaches to project management, the detail of the content will vary between samples.

These are only examples. The content and data will be different for every project, and the narrative is going to depend entirely on your writing style, how much detail you want to include, and how much detail your Project Sponsor likes to see for any given project.

PAVEMENT RESTORATION PROJECT

This is an example of a pavement restoration project submitted by District 4 for FY18. These are only the project detail pages (PDPs), which contain the fields that the Project Manager filled out using Project Web App (PWA). This project is currently in the Evaluation Phase.

Project Information

Project Information

Name* Specify a name for the Infrastructure Project	US93, CAREY NCL TO LAIDLAW RD
Beginning Mile Post	205.29
Ending Mile Post	209.25
Route Enter the highway route that the project is on, if applicable.	US093
Start*	4/11/2013
Owner	Brock Dille
District* District or work organization resonsible for this project	D4
Funding Year* Fiscal Year the project is placed in STIP	2018
Program* Anticipated program funding category (Typically follows the STIP definition)	SHS Pavements.Restoration
Type Of Project* Alternatives Analysis required in Evaluation Phase for Preservation Pavement 1R Rehabilitation, Preservation Bridge,Pavement Maintenance, or 3R Less than or equal to Minor Widening.	Restoration

Scope and Strategic Goals

Project Objective Scope and Strategic Goals

Project Objective Statement The project objective statement describes what a project is to accomplish in order to be successful. It is used to focus the team members, the sponsor and the other key stakeholders on the primary objective of the project. This should included the project's business case.	Purpose: The purpose of this project is to restore the roadway from MP 205.29 to 209.25 of US-93 that has failed. This restoration will restore this section of roadway to its original condition conducting restoration techniques, such as mill & inlay, RAPS, CRABS. This project is to restore US-93 to satisfactory condition. Need: This section of roadway is deficit and is no longer serviceable. This section of roadway has heavy to moderate pavement alligatoring and heavy to medium longitudinal and transverse cracking. US-93 is a 129k truck route. The 2012 TAMS pavement data shows MP 205.29 to 214.454 to be deficient for cracking and roughness index. This section of roadway has a CI of 2.3, RI of 2.88, and a rut average of 0.16". This roadway is rated as poor and deficient. FISCAL YEAR: 2018 or sooner BUDGET ESTIMATE: $3,550,000 (See attachment)

Scope of Work Expanded summary of the work that will be accomplished with each phase. It sets the boundaries of the project and provides the project team with a clear understanding of what needs to be done to successfully complete the phase.	The beginning milepost was to match another project and a construction joint at the north end of Carey, while the ending milepost was selected based on the available funding available. The project at this time is intended to be a CRABS with a seal coat with paving unless budget constraints or HQ policy overrides this direction. The seal coat is to be considered conditional upon the current budget estimate. This section of US-93 serves as the primary route for traffic from the South to the City of Carey and beyond. The priority of this project is to restore the road to satisfactory condition. The existing roadway width varies along this section of road. The project shall maintain the existing drainage patterns with no improvements to the drainage. There will not be any bridge work done. For estimating purposes the project was assumed a 0.7' CRABS with a 0.4' overlay, along with a sealcoat. In the estimate the roadway was assumed to be a 36' roadway (2-12' lanes with 6' shoulders). Further pavement analysis is needed to refine this scope.
Strategic Objectives	Mobility Focused Transportation.Reduction in travel times for commuting commerce recreation and tourism, Implement Innovative Practices.Improvement in performance measures, Mobility Focused Transportation.Increase in the efficiency in which goods are transported

Environmental Considerations

Project Need

Primary Need	Deficient-structurally
Secondary Need	System Linkage, Deficient-standards, Safety

Anticipated Major Environmental Deliverables

Cultural	Field Survey and or Test Investigations, Archaeological and Historic Survey Report, Determination of Adverse Effect Report
Section 4F	Section 4f Evaluation incl Alternatives Analysis
Noise Air Quality and Hazmat	
Miscellaneous	
Wetlands Stream Alteration	Wetland Report (Jurisdictional Determination), Field Survey, Delineation
Navigable Waters	No
Floodway Floodplain	
Species And Habitat	No Effect Report
Stormwater Storm water Pollution Prevention Plan	No
EA FONSI	No
EE Cat Ex Anticipated categorical solution type	Yes-Cat Ex FHWA Approval
EIS ROD	No
Environmental Narrative	There are existing wetlands next to right of way and probability inside the RW, these wetlands need to be protected during construction.

Evaluation Design Standards

Crash History

Crash Base Rate	1.09
Crash Rate with Project Limits	0.28
Spot Locations that exceed Base Rate	
Identify HALs (High Accident Locations)	

Design Data

Design Exception Anticipated	No
Pavement Width This includes the total pavement width including lanes and shoulders.	34-36'
Proposed Design Vehicle This is the vehicle used in the design of the main alignment and the major intersections. Guidance for the proper vehicle to use for each project is given in the Design Manual Section 555.00.	
Design Year The design year for Federal-Aid projects and for complex ST projects is the year the project is shown in the ITD Project Development Schedule plus 20 years plus 2 years (for construction). See Design Manual Subsection 335.02, Traffic Volume.)	2038
Posted Speed Posted Speed should be the actual posted speed throughout the project.	65
Design Speed Minimum Design Speeds are found in the AASHTO Green Book and in the State Standards. Freeways 2004 Green Book Page 503 NHS (Principal Arterial) 2004 Green Book Page 444 (Rural) & 470 (Urban) Non-NHS State Design Standards ITD uses the general rule of 75 mph for Interstate, 60 mph for ramps and state highways, or at least equal to the posted speed. If more than one speed zone exists on a project, list them with limits. They may be placed on a separate sheet if necessary. 3R Projects should have the Posted Speed listed and both the Average Running Speed and the 85th Percentile Speed listed instead of the Design speed. This should be obtained from the District Traffic Section. (See Design Manual, Appendix A).	65
Traffic ADT Present	1,499
Traffic ADT Future	2,409
Traffic DHV Present	301
Traffic DHV Future	474
Proposed Structures and Standards	
Traffic Signals	No
Railroad Crossing Protection	No
Proposed Design Exceptions	

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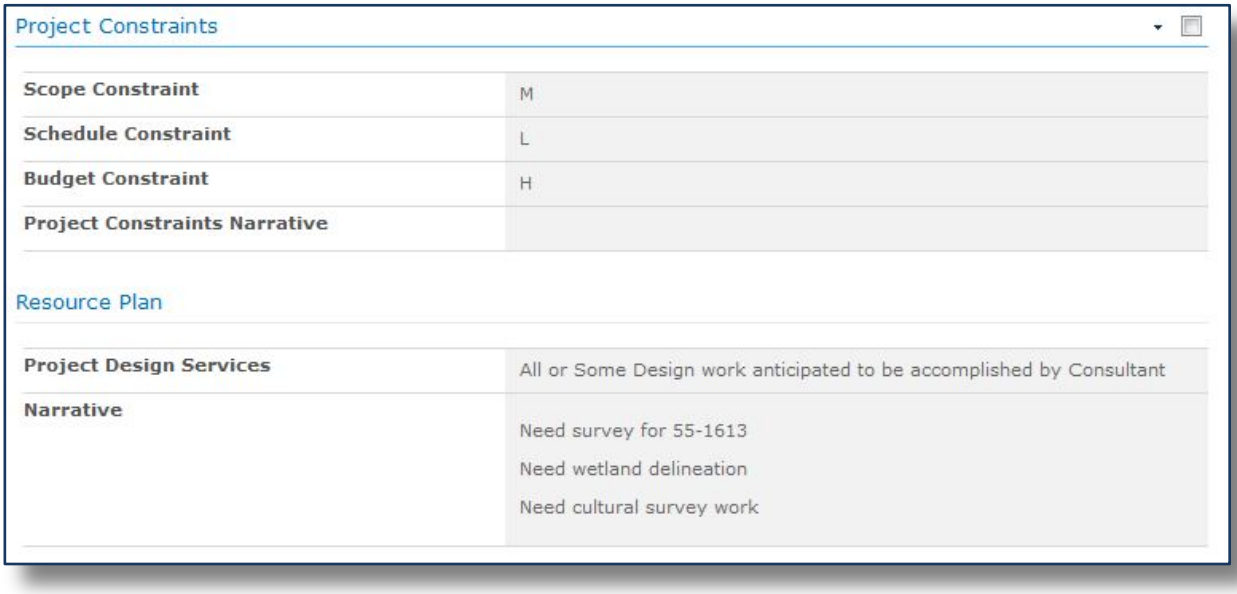
Pavement Type

Pavement Width This includes the total pavement width including lanes and shoulders.	34-36'

Project Standards

Project Standards	3R
Other Comments	

Resource Plan and Constraints



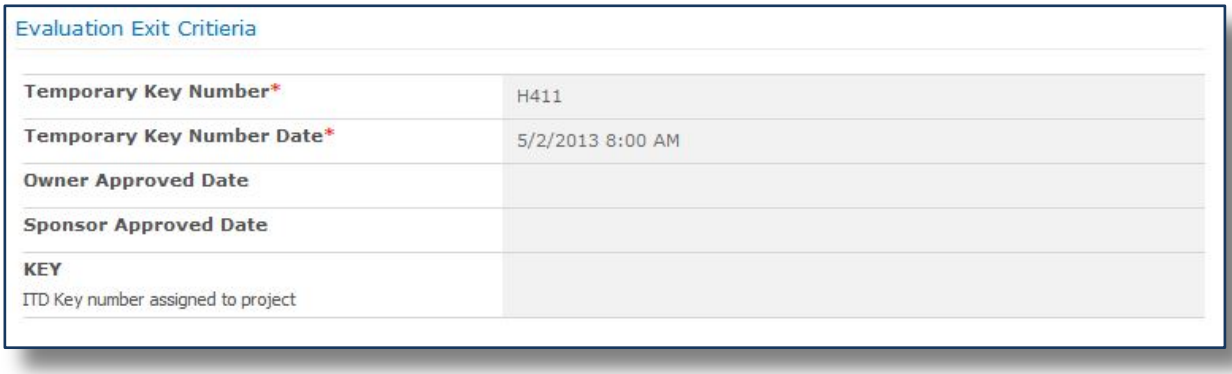
Project Constraints

Scope Constraint	M
Schedule Constraint	L
Budget Constraint	H
Project Constraints Narrative	

Resource Plan

Project Design Services	All or Some Design work anticipated to be accomplished by Consultant
Narrative	Need survey for 55-1613 Need wetland delineation Need cultural survey work

Evaluation Exit Criteria



Evaluation Exit Critieria

Temporary Key Number*	H411
Temporary Key Number Date*	5/2/2013 8:00 AM
Owner Approved Date	
Sponsor Approved Date	
KEY ITD Key number assigned to project	

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BRIDGE RESTORATION PROJECT

This is an example of a bridge restoration project submitted by District 6 for FY17. These are only the project detail pages (PDPs), which contain the fields that the Project Manager filled out using Project Web App (PWA). This project is currently in the Evaluation Phase.

Project Information

Project Information

Name* Specify a name for the Infrastructure Project	BADGER CR BR TETON CO
Beginning Mile Post	2.785
Ending Mile Post	2.785
Route Enter the highway route that the project is on, if applicable.	SH 32
Start*	9/3/2013
Owner	Troy Williams
District* District or work organization resonsible for this project	D6
Funding Year* Fiscal Year the project is placed in STIP	2017
Program* Anticipated program funding category (Typically follows the STIP definition)	SHS Bridges.Bridge Restoration
Type Of Project* Alternatives Analysis required in Evaluation Phase for Preservation Pavement 1R Rehabilitation, Preservation Bridge,Pavement Maintenance, or 3R Less than or equal to Minor Widening.	Restoration

Scope and Strategic Goals

Project Objective Scope and Strategic Goals

Project Objective Statement The project objective statement describes what a project is to accomplish in order to be successful. It is used to focus the team members, the sponsor and the other key stakeholders on the primary objective of the project. This should included the project's business case.	The purpose of the Badger Creek Bridge, Teton County project is to maintain a safe and operational highway facility, in accordance with current design standards on SH 32. This will be accomplished by replacing the aging structure with a new bridge. The Plans, Specifications and Estimate are scheduled to be delivered by September 30, 2016 with construction scheduled the following year. The design and construction budget is $784,000, established by the State Bridge Engineer. The Bridge Restoration Program ensures that Idaho's state highway system bridge asset is in good repair and with no weight or width restrictions so as to improve safety, mobility and economic vitality. The Bridge Restoration Program funds the replacement of bridges on the State Highway System.
Scope of Work Expanded summary of the work that will be accomplished with each phase. It sets the boundaries of the project and provides the project team with a clear understanding of what needs to be done to successfully complete the phase.	The scope of work is to replace the existing bridge in the same general location with a new structure carrying S.H. 32 over Badger Creek at milepost 2.785. The existing structure is a two span cast-in-place slab bridge with spans of approximately 19' and 19' with no skew. The bridge is 28' between

	curbs with a total width of 30'-6". The superstructure consists of a 10 1/2" concrete deck. The minimum clearance above high water is 1.7'. The replacement structure is proposed to be a single span bridge with a span of 57'. A clearance of 2'-0" above Q50 will be provided. The integral abutments will be pile supported. The superstructure is proposed to be 9 - 21" voided slab girders with a 0.2' asphalt pavement. The replacement structure will include two 12' lanes and two 2' shoulders . The total width will be 36'-0" which is 2' wider than the required State standard width to accommodate the 4'-0" voided slab girder width. A minimum grade raise of 1.1' is anticipated to provide 2'-0" of clearance above Q50 and accommodate a deeper superstructure. The grade of State Highway 31 should also be analyzed to meet current design standards for site distance. It is anticipated that the new bridge will be built in stages to allow for one lane of traffic controlled by a stop light on the existing structure. Aspects of accelerated bridge construction will be used such as precast abutment caps.
Strategic Objectives	Implement Innovative Practices.Improvement in performance measures, Safest Transportation System.Impact of corridor-safety initiatives and improvements

Environmental Considerations

Project Need

Primary Need	Deficient-structurally
Secondary Need	Safety, Deficient-standards

Anticipated Major Environmental Deliverables

Cultural	Archaeological and Historic Survey Report, Determination of Adverse Effect Report, Field Survey and or Test Investigations
Section 4F	Section 4f Deminimus
Noise Air Quality and Hazmat	Haz Mat Phase 1
Miscellaneous	
Wetlands Stream Alteration	Permit Application, Delineation, Wetland Report (Jurisdictional Determination), Field Survey
Navigable Waters	No
Floodway Floodplain	Floodplain Encroachment Report, Sole Source Aquifer Packet, Field Survey, Floodplain Encroachment Permit App, Floodway Encroachment Report
Species And Habitat	No Effect Report
Stormwater Storm water Pollution Prevention Plan	No
EA FONSI	No
EE Cat Ex Anticipated categorical solution type	Yes-Cat Ex ITD Approval
EIS ROD	No

Environmental Narrative	The existing Badger Creek Bridge (Bridge Key 13865) was constructed in 1954. It may be Section 106 eligible. There is potential for asbestos in the concrete of the old bridge. It is anticipated the project will require a Section 404 Wetland Permit & Water Quality Certificate.

Environmental Design Standards

Crash History

Crash Base Rate	1.48
Crash Rate with Project Limits	No recorded accidents within the project reach in last 5 years.
Spot Locations that exceed Base Rate	None
Identify HALs (High Accident Locations)	None

Design Data

Design Exception Anticipated	No
Pavement Width This includes the total pavement width including lanes and shoulders.	28'
Proposed Design Vehicle This is the vehicle used in the design of the main alignment and the major intersections. Guidance for the proper vehicle to use for each project is given in the Design Manual Section 555.00.	WB-62
Design Year The design year for Federal-Aid projects and for complex ST projects is the year the project is shown in the ITD Project Development Schedule plus 20 years plus 2 years (for construction). See Design Manual Subsection 335.02, Traffic Volume.)	2039
Posted Speed Posted Speed should be the actual posted speed throughout the project.	55
Design Speed Minimum Design Speeds are found in the AASHTO Green Book and in the State Standards. Freeways 2004 Green Book Page 503 NHS (Principal Arterial) 2004 Green Book Page 444 (Rural) & 470 (Urban) Non-NHS State Design Standards ITD uses the general rule of 75 mph for Interstate, 60 mph for ramps and state highways, or at least equal to the posted speed. If more than one speed zone exists on a project, list them with limits. They may be placed on a separate sheet if necessary. 3R Projects should have the Posted Speed listed and both the Average Running Speed and the 85th Percentile Speed listed instead of the Design speed. This should be obtained from the District Traffic Section. (See Design Manual, Appendix A).	55
Traffic ADT Present	1,213

Traffic ADT Future	1,465
Traffic DHV Present	165
Traffic DHV Future	192
Proposed Structures and Standards	Minimum bridge width = 34'-0" out to out & 31'-4" curb to curb Proposed bridge width = 36'-0" out to out & 33'-4" curb to curb Vertical Clearance = 2'-0" above the Q50 flow. Design Load = HL-93
Traffic Signals	No
Railroad Crossing Protection	No
Proposed Design Exceptions	None

Pavement Type

Pavement Width This includes the total pavement width including lanes and shoulders.	28'

Project Standards

Project Standards	State
Other Comments	

Resource Plan and Constraints

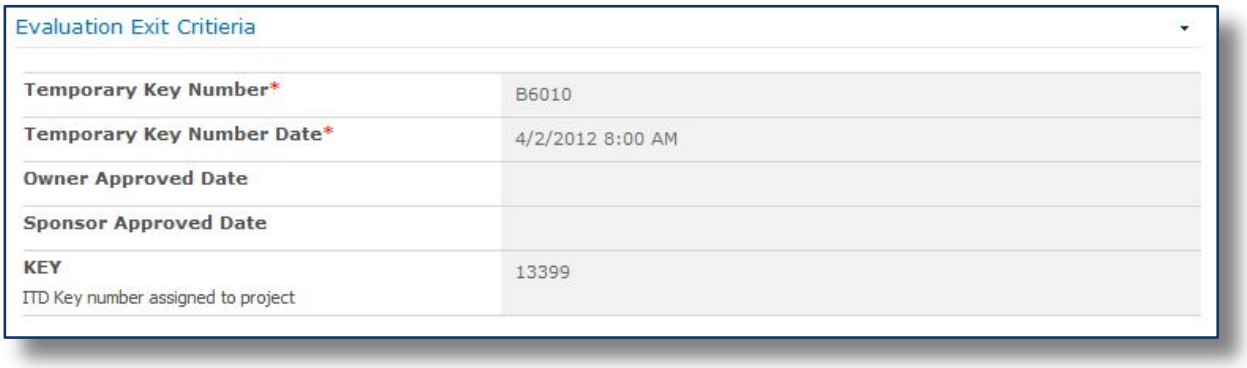
Project Constraints

Scope Constraint	H
Schedule Constraint	M
Budget Constraint	L
Project Constraints Narrative	

Resource Plan

Project Design Services	All or Some Design work anticipated to be accomplished by Consultant
Narrative	May require foundation investigation drilling by another district or consultant. May require Consultant Services for Section 106 & 4f process. This project may go through the Design Build or Construction Management/General Contractor (CMGC) process.

Evaluation Exit Criteria



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APPENDIX B: GLOSSARY OF ACRONYMS

2PM	Planning/Program Management
BIC	Business Intelligence Center
CIP	Capital Investment Program
COMPASS	Community Planning Association of Southwest Idaho
DOH	Division of Highways
DPC	Development Phase Charter
EIS	Environmental Impact Study
EPT	Enterprise Project Type
FHWA	Federal Highway Administration
ITD	Idaho Transportation Department
ITIP	Idaho Transportation Improvement Program
LHTAC	Local Highway Technical Assistance Council
MPO	Metropolitan Planning Organization
MSP	Microsoft Project Professional 2010
PDP	Project Detail Page
PM	Project Manager
PMBOK	Project Management Body of Knowledge
PMI	Project Management Institute
PS&E	Plans, Specifications & Estimates
PSS	Project Scheduling System
PWA	Project Web App
QPM	QuantumPM, Inc.
QSA	QuantumPM Schedule Auditor
STIP	Statewide Transportation Improvement Program
TMM	True Minimum Milestone
WBS	Work Breakdown Structure