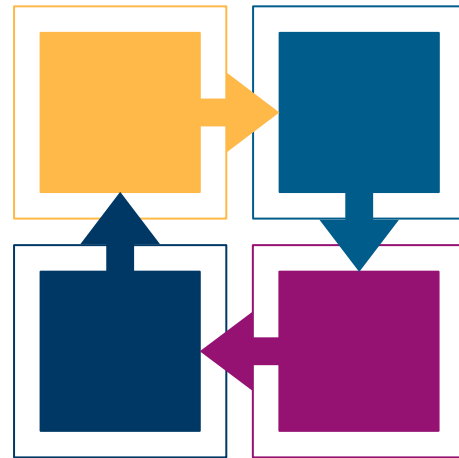


A QUICK REF GUIDE

Project Concepts

A reference guide to navigating the project framework; the process and tools needed to deliver impact and Value for Money



Finance Office
(Strategy Implementation
& Risk)

May 2024



University
of Glasgow

our values

Ambition & Excellence	Curiosity & Discovery	Integrity & Truth	An Inclusive Community
We strive for excellence through our work	We innovate and solve problems together	We uphold honesty, integrity and fairness	We are one Glasgow team, and we care for and respect one another
We defend academic freedom globally	We lead by influence and example	We share our work widely and generously	We advocate for diversity and believe in variety as a vital part of a healthy University
We recognise and celebrate shared success	We engage with lifelong learning and personal development	We do the right thing, not the easy thing - or we don't do it	We champion education as an engine for social progress
We have an unrelenting focus on development	We learn from our mistakes	We take responsibility	We practise and advance Sustainability

introduction

Also in the series:

Running Full projects

Running Change projects

Running Simple projects

Project roles

Business cases and benefits

Reporting

GRC at the University

Using project and risk
software

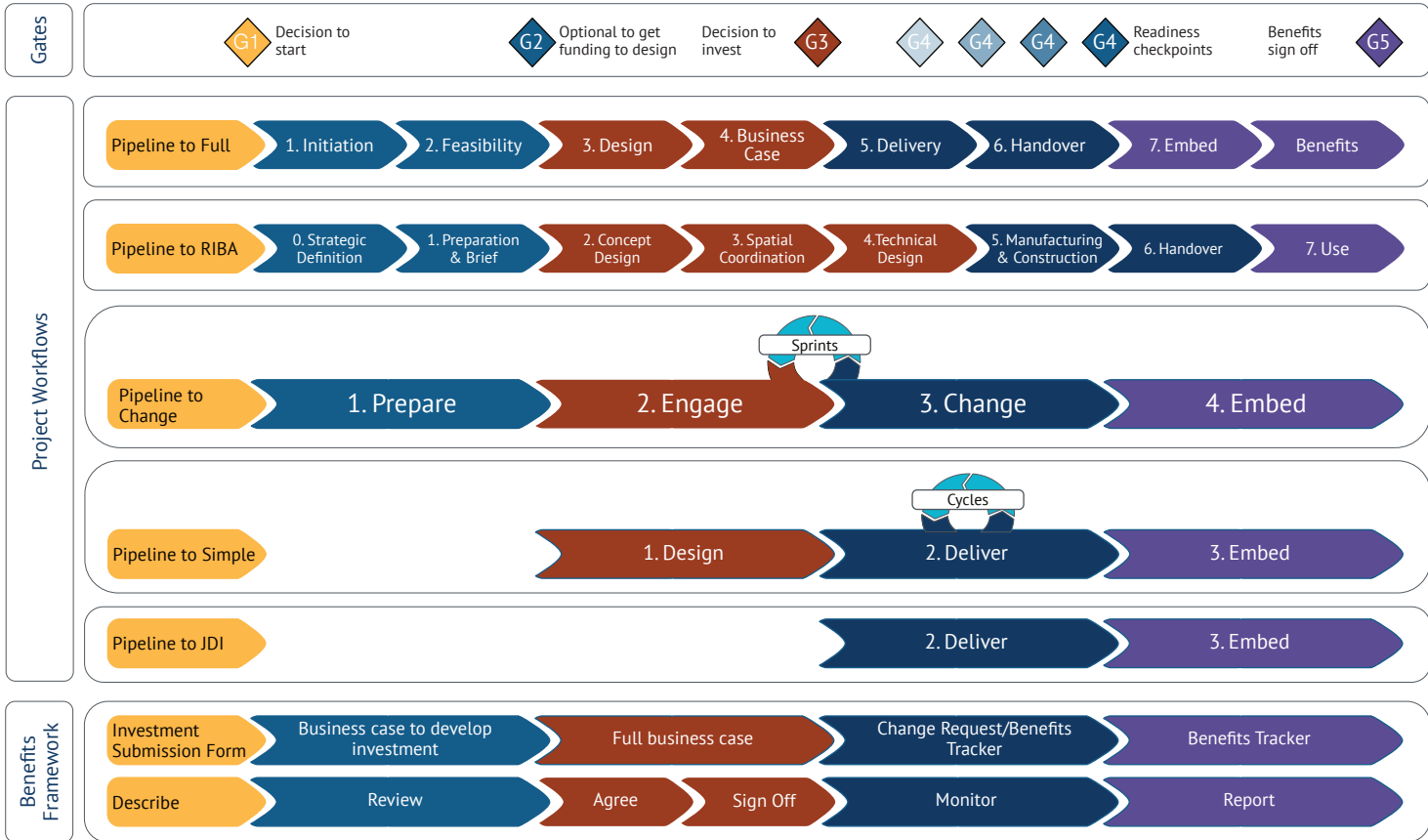
This digital booklet is one of ten in the Quick Ref series. It is intended to provide anyone in the University with a broad understanding of how projects are created and delivered throughout the University and provides the key reference points.

Managing projects can be challenging in any organisation, however, the nature of Higher Education funding means that we must be rigorous in our decision making and demonstrate Value for Money when prioritising our investment decisions and delivering change.

The booklet will outline the various approaches to running projects as well as common themes such as completing the business case, approving funding and demonstrating success.

These digital booklets are designed to give you the key take-aways and allow you to quickly access definitions and processes. More detailed documentation, processes, examples and support can be found on our website at www.gla.ac.uk/ppm

the framework



choosing an approach

	FULL	RIBA	CHANGE	SIMPLE	JDI
other terms used	PRINCE2 Waterfall	RIBA (Royal Institute of British Architects)	Agile Kanban	Adaptive	Just do it Fast-track
sizing	best for large scale projects	Estates projects only	large or small projects	best for small projects	very small projects with no spend
approach	highly structured	highly structured	highly structured	less structured	little structure
stages	8	8	4	3	2
number of gates	4 +1 optional	4+1 optional	4 +1 optional	4	3
scope	fixed and agreed upfront	fixed and agreed upfront	value is agreed and scope remains flexible	fixed (with a small degree of flexibility) and agreed upfront	simple and fixed
planning	fixed and agreed upfront	fixed and agreed upfront	responding to change takes precedence over planning	flexible against agreed high level plan	simple and flexible
documentation	detailed requirements and other documents	detailed requirements and other documents	working solutions takes precedence over documentation	focus is on post project documentation	minimal: no business case
changes	scope and plans are fixed and difficult to make changes once started	scope and plans are fixed and difficult to make changes once started	scope and plans are highly flexible	scope is fixed and controlled; plans are highly flexible	no business case means no change control
Knowledge required	structured training and experience required	structured training and experience required	structured training and experience required	little training and no experience required	Basic PPMA
Great for	regulatory and legislative projects where you are very clear on where you want to go and how you are going to get there	construction and maintenance	software development and change projects projects where you are not clear or can flex where you want to go and how you are going to get there	projects where you know where you want to go but not sure how to get there	Team projects that do not need any level of approval. Only for projects with no capital spend meaning no business case

full workflow



What's involved?

Also known as Waterfall Methodology and aligns to the PRINCE2 ways of working.

This approach is heavily used for projects with a regulatory set of deliverables which mean we can not easily go back and change something. A lot of emphasis is placed on documents and plans.

Running projects in this way often requires formalised training and hands-on experience.

Waterfall means just that - one stage cascades into the next and it is inadvisable to go back upstream to change something. The linear approach relies on detailed documentation and planning agreed up front with strict change control in place.

Given that it is a thorough and highly structured approach, it is a great example for large projects that require a very specific outcome or set of deliverables. Changing the scope or end product mid-project means significant rework to reschedule and re-apply compliance requirements.

The main challenge when approaching a project in this way is that documentation must be signed off at the start. This will mean that the project may take significant time to get to business case stage. It also means that you will not see the end product until the very end of the project by which time it is too late to make changes.

RIBA workflow



What's involved?

The Royal Institute of British Architecture (RIBA) is only applicable to Estates driven projects such as construction and maintenance

The RIBA Plan of Work is a comprehensive model that outlines the design and construction process for buildings. It organises the entire lifecycle of a construction project into eight stages, guiding architects, designers, and construction professionals through each phase.

Stage 0: Strategic Definition: project objectives, feasibility, and strategic planning are established

Stage 1: Preparation and Brief: the project brief is developed, including requirements, constraints, and initial design considerations

Stage 2: Concept Design: design options, spatial layouts, and aesthetics

Stage 3: Developed Design: refine the concept design, incorporating technical details, materials, and structural considerations

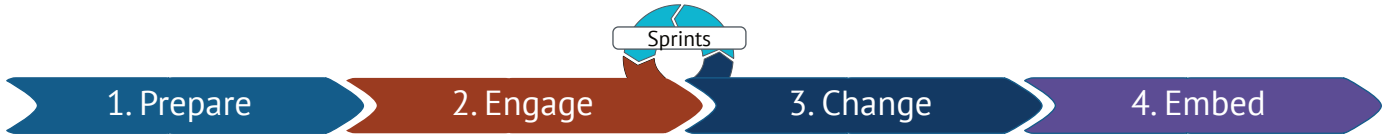
Stage 4: Technical Design: technical drawings, specifications, and construction details are prepared

Stage 5: Construction: contractors execute the design

Stage 6: Handover and Close-Out: Upon completion, the building is handed over to business as usual

Stage 7: Use and Aftercare: Post-occupancy evaluation, maintenance, and ongoing management

change workflow



Other terms you will hear are
Agile or Kanban.

Information Services and
Transformation run many of
their projects as Change.

The approach is ideal if the
end outcome has flexibility in
what will be delivered and
when. Based on user
feedback, the project creates
value by flexing to changing
needs.

It is not recommended to
manage your projects in this
way without some formalised
training or being part of a
project to understand the
roles and terminology.

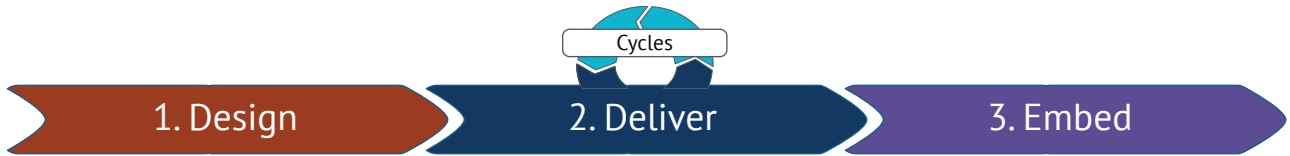
What's involved?

Change breaks down projects (large or small) into
manageable chunks, delivered in sprints or iterations. At
the end of each sprint something of value is produced. The
product produced during each sprint should be able to be
put into the world to gain feedback from users or
stakeholders.

Change has designers, developers and business people
working together simultaneously to deliver value. Testing is
integrated throughout the process. This means higher
overall quality and less time spent on quality assurance at
the end of the process.

The methodology centres on creating a backlog; a list of all
things that needs to be done within a project. It replaces
the traditional requirements specification common in many
projects. The items within a backlog can have a technical
nature or can be user-centric e.g. in the form of user stories.

simple workflow



What's involved?

Also known as Adaptive and fast-track

This approach is best used for smaller projects where the vision is clear and there are only a few deliverables. Projects tend to be less than 1 year and the team is often spread across the University.

A low level knowledge of running projects is required to use this approach

Simple/Adaptive Methodology breaks the up-front agreed high level scope of the project into easily digestible chunks called cycles. Each cycle is further broken down into discreet activities and deliverables. At the end of each cycle, the activities and deliverables are reviewed against the original scope and the plans and/or scope are changed accordingly

This approach is light on project documentation and does not lend well to projects that have a regulatory aspect or will involve large scale changes to the way we work. Even at the most detailed level, scope is a single page and detailed plans are rarely more than 30 activities/deliverables

Typically, the project will start off with a simple agreed scoping document showing the end state. This is normally the Investment Submission Form but alternatives such as a single slide Vision Board (examples available on the site) are a good alternative.

JDI workflow



What's involved?

JDI stands for **Just Do It**

There are many times when we create short term working groups or teams to meet a very specific goal.

This goal, or mini-project, does not require funding and formal project management may be too structured and would not add value. However, this could form part of a bigger piece of work and you may wish to track/report plans, progress and benefits.

JDI projects do not require formal approval and, as no funding is required, business cases are not necessary. As there is no business case, plans and benefits are not baselined and change requests are not necessary.

That said, you can still use the business case template to help structure your approach. Using JDI workflow allows you to mix and match any template from the toolkit.

Many use this approach for non-capital projects and very short-term working groups. Any benefits are still aggregated into the wider portfolio of work, however, there will be no formal tracking.

As JDI is one of 5 workflows in the project software, there will be some mandatory data still required such as completion date, benefits realisation date, a Vision Statement and mapping to strategic objectives.

JDI requires no formal training and anyone can adopt this workflow with basic project software training.

collaborating

Finance Office

Investment and benefits management is led by the Finance Office (Strategy Implementation and Risk). This team manages the Risk Framework and Portfolio Framework as well as the business case process. All business cases seeking spend >£500k will be managed through this team. Support is available in writing the business case and managing risk.

Email: uofg-investment@glasgow.ac.uk or uofg-risk@glasgow.ac.uk

Heads of Finance

The University Services and each College Head of Finance is responsible for ensuring that business cases are robust before submission including identification of funding source. Your local Finance Team can support you in writing your business case.

Estates

Estates has a Project Management Office to support all aspects of Estates programmes of work. If your project has an Estates element to it, section 14 of the business case must be completed. Contact your Estates Business Partner or email: estates-pmo@glasgow.ac.uk

Information Services

All projects with a technology element must complete section 17 of the business case. Information Services has a project management function to support all technology-led projects. Contact your Information Services Business Partner or email: project_delivery@glasgow.ac.uk

Procurement

Most capital projects require procurement of services or goods and must follow UofG procurement processes. This is detailed in section 16 of the business case. Contact your Procurement Business Partner or email: procurement-helpline@glasgow.ac.uk

Sustainability

Achieving our sustainability goals is central to our values system. Projects that will directly, indirectly, positively or negatively impact on our carbon footprint or strategic ambition must complete section 15 of the business case. Visit www.gla.ac.uk/myglasgow/sustainability

Planning Insights and Analytics

This team has access to most of the available data sources across the institution. This is invaluable when identifying performance indicators or benefit baselines. This is covered in sections 9 and 12 of the business case. Contact your PIA Business Partner or email planning@glasgow.ac.uk

The Anywhere Platform

Online training is available directly from uofg.ppmananywhere.com. For licence requests or contacting the PPM support team, please use the IT Helpdesk.

Online and self-service resources

www.gla.ac.uk/ppm

the gate process

Investment Submission Form

Gate
1

Decision to start

Should we develop this idea further? No governance required

Business Case

Gate
2

Upfront funding required

Do we need money to develop the business case?

Business Case

Gate
3

Decision to invest

Do we commit fully to the project?

Tracked through system

Gate
4

Readiness checkpoints (there can be more than one)

Can we go live and move to business as usual?

Project Closure Report

Gate
5

Benefits sign off

Did we get the outcome we set out to make?

gate purposes

Gate 1	Is there sponsorship? Is there a compelling need? Is there funding? Who needs to be involved?	Sponsor Originator of the idea
Gate 2	Is funding required to write a business case? Is there a link to strategy? Are there clear benefits?	Sponsor Project Lead Finance Local PMO
Gate 3	Is the scope clear and unambiguous? Are we clear on what success looks like? Are benefits baselined with targets? Is this the best option?	Sponsor Project Lead Finance Investment Committee
Gate 4	Have we delivered what we said we would? Are all stakeholders aware of any change? Can we start to disband the project? Does the sponsor accept the benefits?	Sponsor Project Lead Delivery Board Finance
Gate 5	Is the project fully closed? Did we achieve the benefits?	Sponsor Finance

strategic objectives

Wherever possible, you should align the project deliverables to one of the following

Although some of our projects relate to operations, the majority contribute towards delivery of our strategic objectives.

The choice of strategies in the business case are:

Campus development

Innovation

Internationalisation

Learning and Teaching

Research

Services

Student Experience

Sustainability

UofG 2025

Reimagining our curriculum to prepare students for a challenging and changing world

Embracing challenge-led research to address the needs of global society

Strengthening our partnerships to amplify our local and global impact

Leading with our values and putting people first

Creating space to connect through new collaborative and social space on campus

Building a sustainable future through our research and actions

Investing in our digital realm to enhance the staff and student experience

Adopting collaborative technologies for frictionless and flexible work and study

Engaging with our civic mission via our local and global communities

Key Performance Indicators

KPI title	Associated strategy
CO2 emissions (kT)	Sustainability
Collaborative and contract research/total income	Research
Collaborative space	Estates
Colleague diversity - % declared disabled	People and OD
Colleague diveristy - % BAME	People and OD
Colleague diversity - senior women	People and OD
Colleague engagement	People and OD
Doctorial degrees - awarded/staff R&T FTE	Learning and Teaching
Entry tarriff	Learning and Teaching
Global reputation (THE reputation ranking)	Internationalisation
Graduate employability	Learning and Teaching
International student population	Internationalisation
Large grant capture - number of funding bodies	Research
Operating cash before investment	Finance
Quality of research publications	Research
Research income (£k)/Staff R&T FTE	Research
Student progression	Student experience
Student satisfaction	Student experience
UG mobility	Learning and Teaching
Widening access MD0-20	Learning and Teaching

investment executive summary

This is the very first document you will create and serves 2 purposes:

It is designed to help articulate your project idea whilst it is in the pipeline stage

If your project takes off and moves out of the pipeline stage, this document becomes the Executive Summary of the Business Case

This is a document to help explain your project quickly and easily.

This is 3 pages maximum

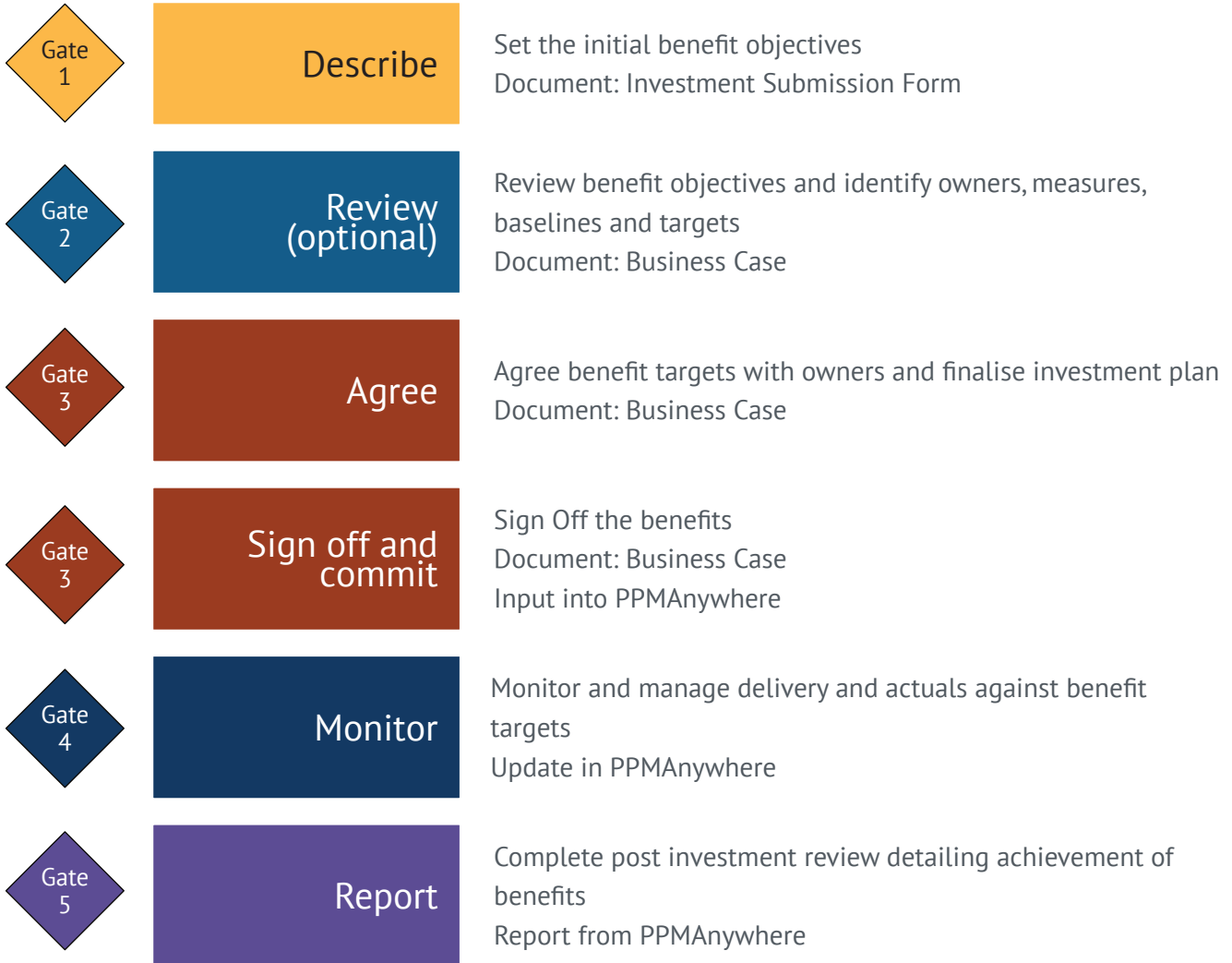
Remember that drop down choices do not appear when using Word online. You must use the desktop version.

Section	Summary
Overview and funding	When you first write this document, this section may be challenging to complete, however, when using as the summary to the business case, all sections must be completed and checked over by your Finance Business Partner or Head of Finance
1. Vision Statement	Summarise your project in less than 100 words. When your project is added to the PPMA system, it is this summary that is included in all status reports so it needs to sell what it is you are doing quickly to the reader. Think elevator pitch
2. Project Summary	A summary of your project including objectives and context, however, remember your 3 page limit. When you are writing the full business case, you will have opportunity to explain more. Think about this project being compare to others. How would you get those deciding on where to invest that yours is a good choice?
3. Why is this important	Choose from the drop down values. You can find the prioritisation drop down values on page 14 of this Quick Ref guide
4. How does this contribute to strategy?	Choose from the drop down values. Often you will have more than one so which one is the most important? Second line onwards become secondary
5. Deliverables and benefits table	This is the main thrust of your project. Limiting to the top 3 (and often there is only 1) deliverables, describe what that will cover, what it will costs, when it will be delivered and what impact it will have. The drop down values are available on page 11 of this Quick Ref guide.

investment business case

Section	Summary
6. Project background and 7. Project objectives	Why do you want to do this project and what are the main things you want to achieve?
8. Impact	This is the main thrust of your project. describe what that will cover, when it will be delivered , what will it cost and what impact it will have. The drop down values are available on page 11 of this Quick Ref guide. Examples are delivery of a new system, change of a new process, recruitment of a new team, refurbishment of a lab, etc.
9 Milestone and goal planning	In addition to the deliverables milestones, you need to include the gate milestones and any additional major milestones that will be added to The Anywhere Platform and show in the roadmaps
10. Options considered	What other ways to achieve the same outcome are available to us? Always include the option of not doing the project. What would that mean to the University?
11. External funding	Details of any funding or grants that will contribute towards budget
12. to 15. Collaboration	For each section, note any collaboration required across the University to deliver the project
16. Data validation	Ensuring the data provided in the document is robust
17. Delivery approach and governance	Using all the key concepts in this Quick Ref guide, how will you deliver the project?
18. Risks and Assumptions	You will do a more detailed risk assessment once the project is live as well as create dependencies with other projects, however, for this document, provide an overview
19. Approvals	Depending on who you have collaborated with in sections 13 to 17, we keep an audit trail of who and where has reviewed the business case

benefits process



benefit categories

Benefit title	Benefit description
benchmark improvement	Use where there are rankings such as 10th in the league table or top 25 in the world
compliance	Regulatory or certification. Normally represented as baseline non compliant to target compliant
cost avoidance	Used to describe the risk of not doing something. "If we don't do this then it could cost this much"
cost savings	This refers to a reduction in operational budget as a result of completing the project
funding increase	Creating opportunities to apply for more funding or increasing our chances to be successful in funding and grant applications
income growth	Generate more money, for example, through more student recruitment
performance improvement	Measurable and positive difference to a process or system such as reduced error rates or improved response times
data quality improvement	This can relate to data accuracy, data use or data access
reduced transactional work	Staff or students spend less time on repeatable and/or administrative tasks so they can focus on more value add activities
reputational improvement	Although many of these benefits are not measurable, where they can be used is alongside benchmark improvements or to show how we will be perceived including survey results
risk mitigation	A project outcome will reduce the likelihood or impact of a risk or increase the chances to seize opportunities; this must relate to a risk within PPM anywhere
staff experience improvement	This is most commonly used as a measurable benefit for specific questions in staff surveys. Non measurable staff experience improvement tends to be shown as "contribution to..."
student experience improvement	This is most commonly used as a measurable benefit for specific questions in student surveys. Non measurable staff experience improvement tends to be shown as "contribution to..."
sustainability	Is there a measurable reduction in our CO2 footprint?

benefits table

Register Heading	Summary
This will result in an improvement to (dropdown)	<ul style="list-style-type: none">• Benchmark Improvement• Compliance• Cost Avoidance• Cost Savings• Data Quality Improvement• Funding Increase• Income Growth• Other• Performance Improvement• Reduced Transactional Work• Reputation Improvement• Risk Mitigation• Staff Experience Improvement• Student Experience Improvement
Measured as a/an (Examples include “increase in...” or “reduction in...” or “decrease in...”
Measurement type (dropdown)	<ul style="list-style-type: none">• £• %• sqm• time• number• qualitative
From (baseline)	What is it just now?
On this date	What date was the baseline taken
To this target	What do we expect it to be once we have completed the project?
By this FY	What financial year is this expected to be fully realised?

lessons learned table

Register Heading	Summary
Title	Give the lesson a name
Raised by	Who raised this (note that PPMAnywhere will resource stamp who entered it)
Created date	PPMAnywhere will timestamp automatically
Type (dropdown)	Project or operational
Refers to stage (dropdown)	Initiation; feasibility (change - prepare); planning & design (change - engage); delivery (change - change); handover; embedding and close; all phases
Category (dropdown)	Communication; compliance; data effectiveness; delivery approach; financial; governance; health & safety; miscellaneous; process; procurement; project management; quality; resources; scope and objectives; supplier engagement; systems and tools; testing; time/planning; training/skills; ways of working/culture
Value (dropdown)	1 - negative; 2 - mostly negative; 3 - neutral; 4 - mostly positive; 5 - positive
Summary	Describe the lesson including what you would do differently
Action	What specific actions can we take now
Action owner	Who will complete those actions
Action date	When should the action be completed by

change request form and register

Register Heading	Mandatory fields
parent entity	Is this a change to a project, programme or portfolio. It is normally a project
parent entity type	What is the level above. If a project then the parent is a programme
change request number	This is generated by the system
status	Currently analysing; pending approval; rejected; approved
change title	A very short title that will show in reports
change description	An explanation of why the change is necessary
change request reason	Risk; budget transfer; opportunity; planning change; programme delay; project transfers; technical scope change; user drive scope change
change raised by	Who has asked for this change?
change assigned to	Who will manage the change
effective date	When does the change have to happen by
change against	Scope; budget; benefit; plan; resource
change in cost	How much additional budget is required excluding VAT? £0 if none
cost category	AV/IT; budget transfer; construction; contingency; furniture, fixtures and equipment; hardware; other costs; professional services; software; staff costs
total slippage	How much additional time is required (in weeks). 0 if none
approved by	Who or which committee/board has or will approve this?
approved date	When was or when will this be approved?

change request form and register

Register Heading	Optional fields; mainly used in Estates projects
original cost	What was the original budget line?
agreed cost incl. VAT	How much additional budget is required including VAT
remaining contingency	If applicable, how much of the project will be left if this is approved?
attachments	Are there any additional documents included?
In cost report	Estates only
Compensation event instruction number	Estates only



Reports available

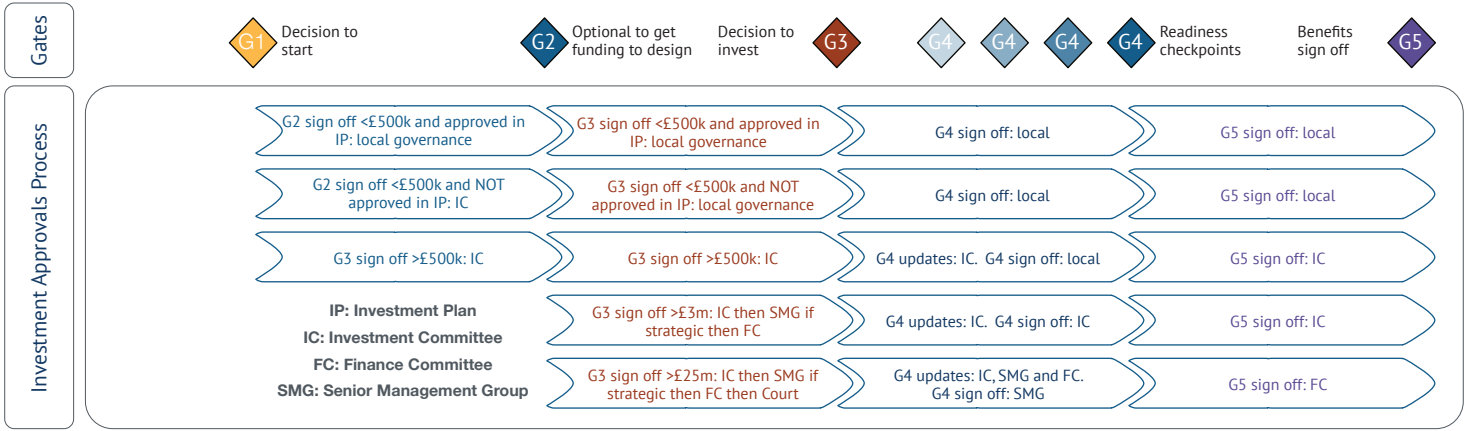
change spreadsheet	A spreadsheet can be created using the Change Request Export Report and sending to Excel
change request form	The data can be exported in a PDF Change Request Form using the Change Request Form Report

prioritisation

We use the following criteria to help determine the category of the project; this helps inform decision making about which projects to tackle first

Regulatory	Business Continuity	Strategic Goals	Sustainability	Capability
Statutory or legislative requirement	Failure to invest in this will result in almost certain loss or disruption to business-critical services	Failure to invest would mean we could not achieve our strategic goals	Would have a direct positive contribution towards reducing our carbon footprint and meeting sustainability goals	Will result in new service, process or technology that demonstrates a competitive advantage for the University
Potential statutory or legislative requirement	Failure to invest will result in a high risk of loss or disruption to business critical services	Failure to invest would mean we could not achieve certain themes in our strategy	Indirectly supports a positive contribution to reducing our carbon footprint and meeting sustainability goals	Failure to invest will lead to a loss in the quality of services, processes or technology
	Failure to invest will result in a significant impact to business services and operations	There may be some impact on the University strategy	Does not relate to our sustainability goals	Failure to invest has the potential to result in a loss in the quality of services, process or technology
	Failure to invest will result in some impact to business services and operations	This may have an indirect impact on our strategy		
This is not a statutory or legislative requirement	Failure to invest will not result in any impact to business services and operations		Would result in an increase to our carbon footprint	This will not lead to improvement to services, processes or technology
Category A			Category C	
Category B			Category D	

governance and approvals



Local financial approval for investments <£500k and already in the Investment Plan

- Colleges go through their College Management Group
- Estates projects go through the Capital Programmes Steering Group (CPSG)
- Technology projects go through the IT Financial Planning Committee (ITFPC)
- See your Finance Business Partner for more information about your own

Financial approval for all other investments

- <£500k and not in the Investment Plan go to Investment Committee
- >£500k goes to the Investment Committee
- >£3m goes to Senior Management Group and Finance Committee
- >£25m goes to Finance Committee, Senior Management Group and Court

Additional business case approvals required

- Significant technology spend may also be reviewed by the IPSC
- Significant Estates spend may also be reviewed the Estates Committee
- See your Finance Business Partner about possible other reviews required

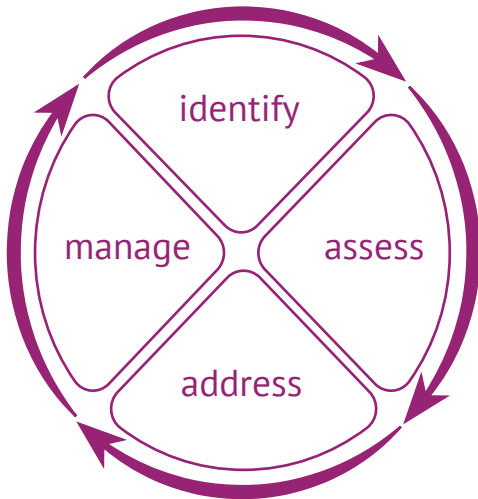
Working Groups and Delivery Boards

- Many programmes and projects establish a Working Group to complete the initial activities up to and including writing the business case
- Upon formal approval, the majority of projects will establish a Delivery Board chaired by the Sponsor to oversee the delivery and handover stages of the project

Corporate and academic governance

- You can find out more about our corporate and academic governance structure, including the Scheme of Delegation, at www.gla.ac.uk/governance

risk framework



The Risk Framework

identify

Think..."if this happens, it could be bad for the project" or "if this happens then it means we could do something different and it would be good for the project"

assess

Think..."what are the chances of this happening?" and "how bad or good would it be for the project?"

address

Think..."what can I do that will stop or change the chances of this happening and/or the impact it could have on the project" or "what is already in place?"

manage

Think..."are the things we are doing making a difference?" and "has anything changed since the last time we looked at this?"

Types of project risks

Financial/project budget
Time/planning
Scope/deliverables
Outcomes/benefits

Describing your risk

List all the things that could happen
Write it as "there is a risk that..."

Root cause analysis

What are the reasons for this description?
List all the things that would have to happen to make this a reality
Write it as "due to..."

Impact analysis

What would happen if anything in the description list actually happened. Think about all the chain reactions.
Write it as "this will result in..."

risk assessment

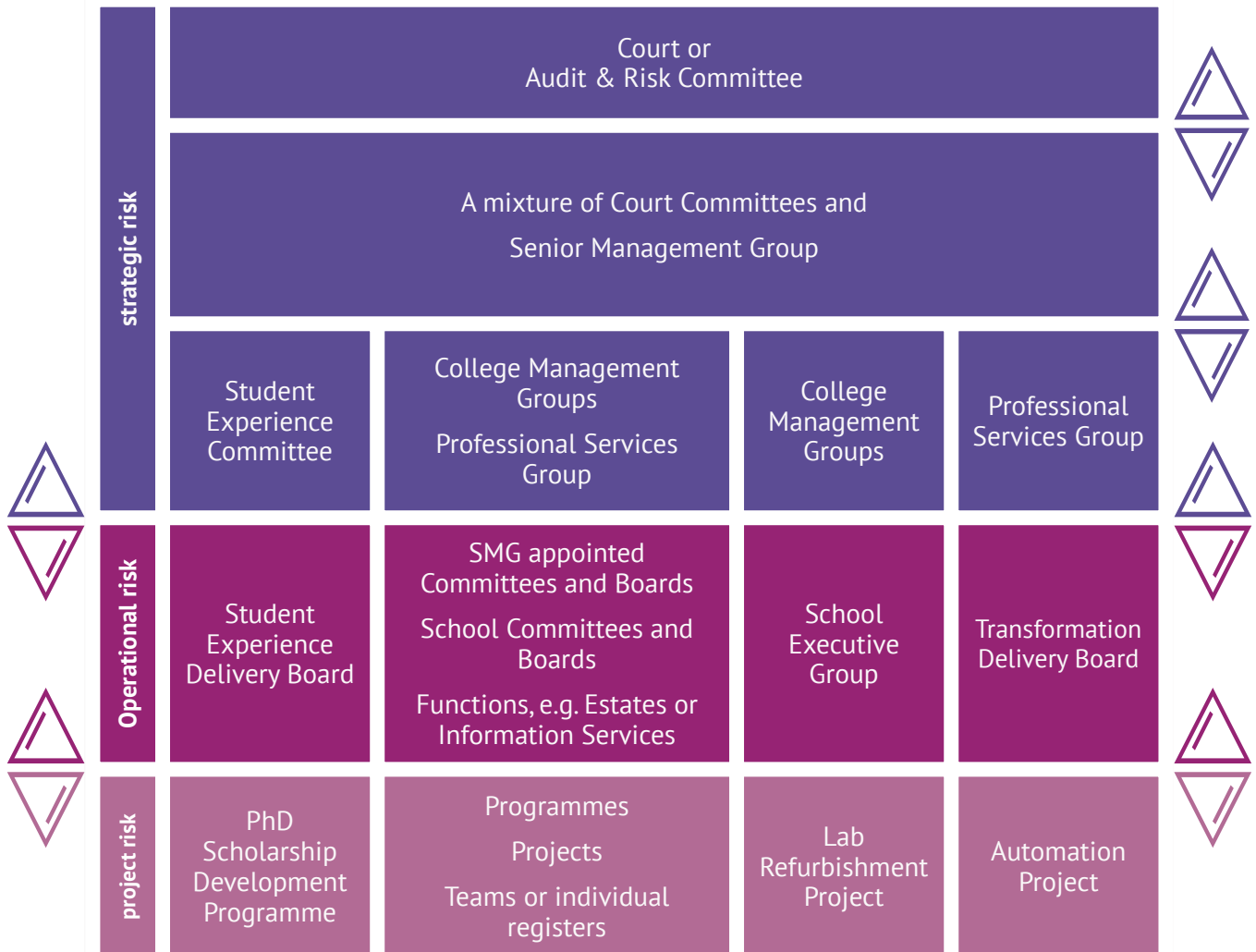
Risk category	1 - very Low impact	2 - low impact	3 - medium impact	4 - high impact	5 - major impact
Project finance and cost	Overspend of less than 1% of agreed budget	Overspend between 1% and 3% of agreed budget	Overspend between 3% and 5% of agreed budget; minor changes to current procurement or current supplier contracts required	Overspend or underspend between 5% and 10% of agreed budget; major changes to current procurement or current supplier contracts required. Additional Investment Submission required	Overspend or underspend of greater than 10% of agreed budget; new procurement or new supplier contracts will be required. Additional Investment Submission required
project resources	We have capability abut there may be an acceptable delay in freeing the capacity to complete the work	We have the capability but there be an unacceptable delay in freeing the capacity to complete the work	We do not have the capability and would need to train current resources to complete the work within acceptable time and/or cost constraints	We do not have the capability and would need to source externally or recruit to complete the work within acceptable time and/or cost constraints	We do not have the capability and sourcing expertise is likely to increase costs and/or time to unacceptable levels
Project scope and business case	Scope change or functionality/quality/ business case impact is barely noticeable	Scope change or functionality/quality/ business case impact is noticeable but accepted by the Sponsor	Scope change or functionality/quality/ business case is noticeable and would require a minor change request	Scope change or functionality/quality/ business case is noticeable and will require a major change request	Scope change or functionality/quality/ business case would not be accepted by the Sponsor
Project time and planning	Slippage of less than 2% of project lifecycle or less than 4 weeks. Has no impact of the implementation of business activities.	Slippage between 3% and 10% of project lifecycle or between 1- and 2-months slippage. Delay of up to two weeks for non-business critical activities and up to 2 days on business-critical activities.	Slippage between 10% and 15% of project lifecycle or between 2- and 3-months slippage. Delay of up to 4 weeks for non-business critical and up to 1-week delay to business-critical activities.	Slippage between 15% and 20% of project lifecycle or between 3- and 6-months slippage. Delay of up to 2 weeks for business-critical activities.	Slippage of greater than 20% of project lifecycle or more than 6 months slippage or a delay of greater than 2 weeks for business-critical activities.
Probability	1% to 20% chance of happening (unlikely)	21% to 40% chance of happening (don't think so)	41% to 60% chance of happening (50/50 chance)	61% to 80% chance of happening (fairly sure)	81% to 99% (almost certain)
Proximity	More than 1 year away	6 months to 1 year away	3 months to 6 months away	1 month to 3 months away	Almost immediately

risk rating and matrix

5 - almost certain this will happen	5	10	15	20	25
4 - fairly sure this will happen	4	8	12	16	20
3 - 50/50 this will happen	3	6	9	12	15
2 - don't think this will happen	2	4	6	8	10
1 - unlikely to happen	1	2	3	4	5
	1 - very Low impact	2 - low impact	3 - medium impact	4 - high impact	5 - major impact

	LOW TO MEDIUM (1-6)	MEDIUM TO HIGH (8-15)	MAJOR (16-25)
risk rating	Requires minimal attention. Should be reviewed and updated periodically to ensure mitigation is effective	An effective mitigation plan should be signed off at the appropriate level and updated regularly to ensure mitigation and controls are effective	Requires immediate and continuous attention. Should be considered for escalation to next level.

risk escalation

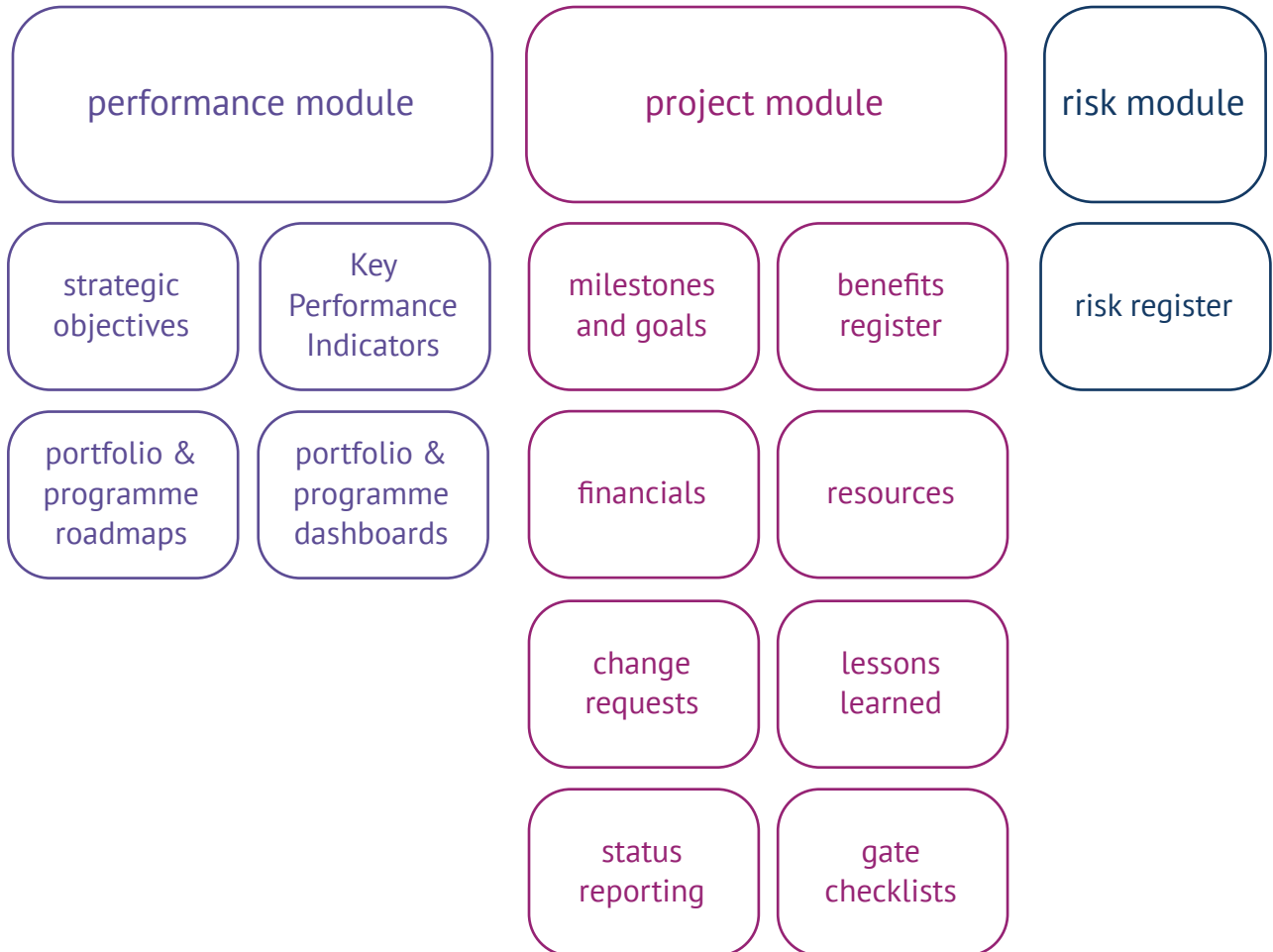


project closure report

Overview	Copied from the original business case
Funding overview	Updated table that was presented in the original business case
Vision statement	Copied from the original business case
status	Currently analysing; pending approval; rejected; approved
Project deliverables	Copied from the original business case with a status of achieved, partially achieved or not achieved. Provide notes on why the status was given
Additional project deliverables	New deliverables added after the business case including any note to timescales and costs
Goals and milestones	Copied from the original business case with status of achieved, partially achieved or not achieved
Closed benefits	A note of original and additional benefits that have either been achieved, partially achieved or not achieved together with explanatory notes
Remaining benefits	A note of original and additional benefits that will continue to be tracked after the project has closed
Lessons Learned	A simplified extract from the Lessons Learned Log including categorisation and positive/negative notes. Refer to QuickRef Guide to Project Concepts
Outstanding actions	Any remaining actions, with owners and dates to be completed after the project has closed
Change Request Summary	A note of all approved and rejected Change Requests submitted throughout the project
approved by	Who or which committee/board has or will approve this?
approved date	When was or when will this be approved?

PPMAnywhere software

The Portfolio and Project Management Anywhere (PPMA) software is a cloud based software system that houses all project data, risk registers and links these to our strategic objectives and Key Performance Indicators. The application has 3 key modules that interconnect:



Find out more in the “Quick Ref To PPMA software”
Access at www.uofg.ppmananywhere.com

PPMA system roles and hierarchy

hierarchy	examples
there are 3 portfolios	<ol style="list-style-type: none">1. Strategy2. Colleges3. Services
these are then broken down into sub-portfolios	<ol style="list-style-type: none">1. Student Experience Strategy2. College of Science and Engineering3. Estates
programmes and sub-programmes are then created	<ol style="list-style-type: none">1. Student Experience Wellbeing Programme2. School of Computing Science3. Estates Asset Management and Maintenance Programme
Each programme or can have many projects	<ol style="list-style-type: none">1. Student NHS Partnership Project2. Research Computing HPC Project3. Boyd Orr Project

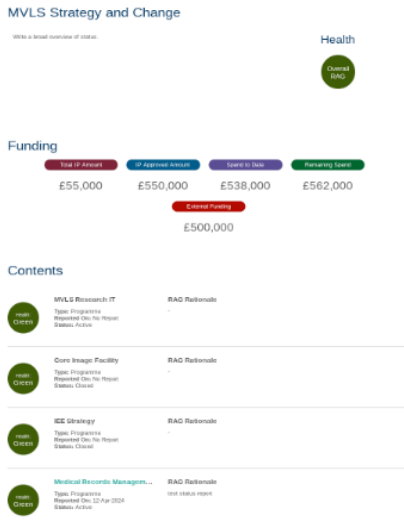
user type	description
Super User	Full create/approval/edit access to assigned sub-portfolio and below with additional rights to create shared reports, landing pages and dashboards
executive and portfolio	Full approval/edit access to assigned sub-portfolio and below with edit rights to create personalised reports, landing page and dashboards
advanced	Full edit access to assigned programme or project and below with edit rights to create personalised reports, landing page and dashboards
team	partial edit access to actions in assigned programme or project or below with edit rights to create personalised reports, landing page and dashboards
view and approve	read only edit access to actions in assigned programme or project and below and can create personalised reports, landing page and dashboards

reporting types in PPMA

type	description	notes
landing page	This is the page that is opened when you open PPMA. It is designed based on your profile and automatically filtered to the portfolios, programmes and projects you have access to	Can be configured by the user to suit individual needs and tastes. Cannot be exported to a PDF; please use dashboards and reports for this functionality
dashboard	A real-time and interactive layout that allows you to drill further down into the detail	A standard suite of dashboards are provided and additional dashboards can be created by the user. Can be exported to PDF or images within PowerPoint.
report	A static snapshot of data to provide stakeholders with updates and analysis.	A standard suite of reports are provided and additional reports can be created by the user. Note Committee and Status Reports should only use the standard suite. Can be exported to PDF or PowerPoint.
export	Many screens have tables and/or graphics. The majority of these can be exported to Excel, PowerPoint or PDF	There is capability to export to other formats as well including Comma Separated Values. Please see your Super User if you have a special format for exporting.

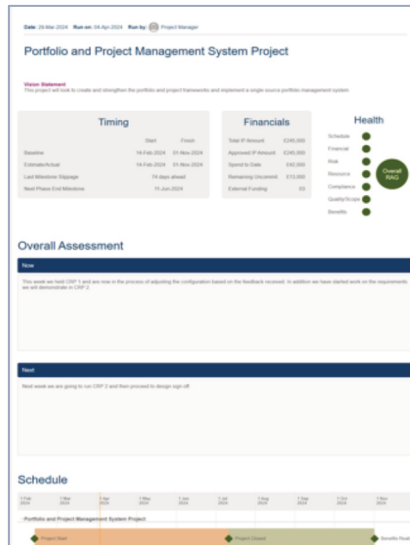
consistent reporting

committee report



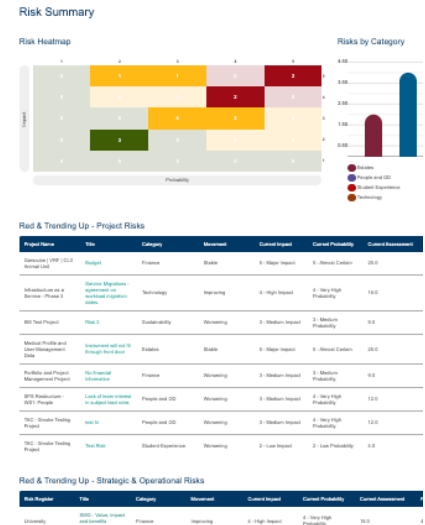
This report can be filtered. This is the standard report that must be used when updating **any** Committee or Delivery Board.

status reports



There are project, programme and portfolio status reports. Personalised reports will not show when users click on the programme or project

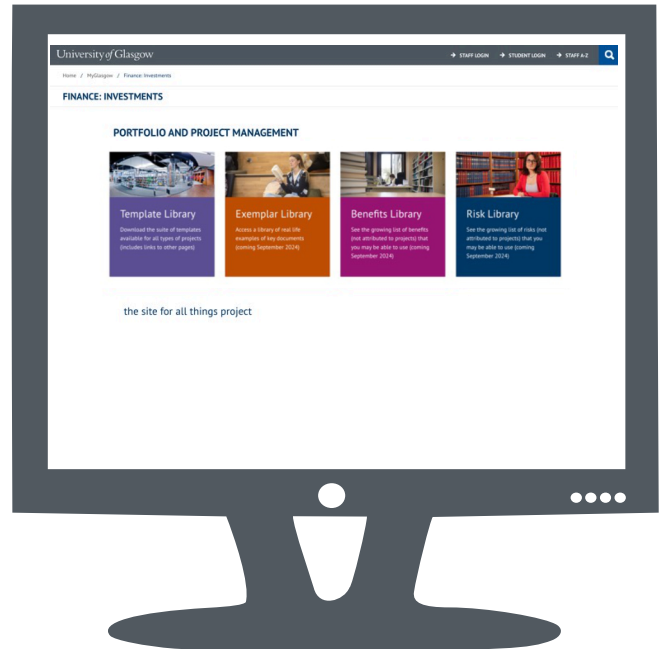
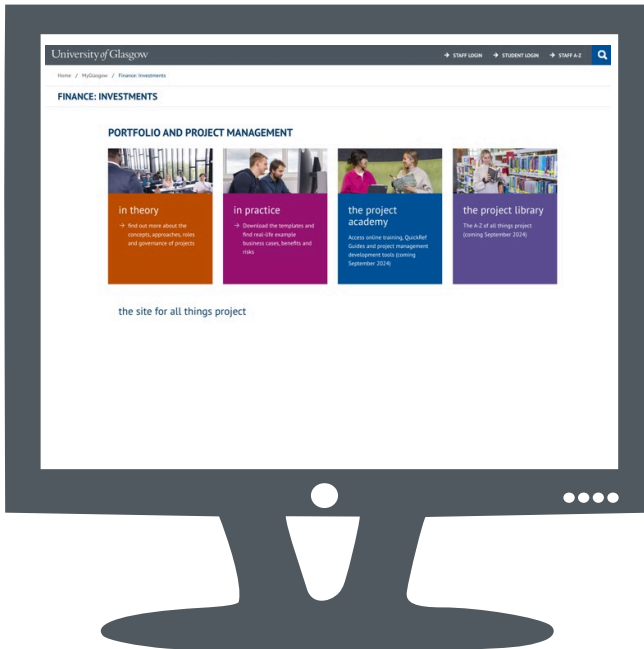
risk registers



This is for all Strategic, Operational and Project Risk Registers

These mandated formats are reviewed regularly by the PPMA Super User Group. Change Requests can be submitted to this group to change any part of the report in the next release.

getting support



www.gla.ac.uk/ppm

Other guides in this series

business case
and benefits

running
projects in
full workflow

running
projects in
simple
workflow

project
roles

running
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project
governance
risk and
compliance

PPMA
reporting

PPMA
software