

Business Case

Project Management Information System (PMIS)

This document presents the business context of the *PMIS Project – Project Management Information System* as a basis for evaluating the project feasibility and providing guidance for project planning.

Brief Project Description

PTR is a Portuguese retail company, having around one hundred stores spread throughout the country. Currently, the Company has about 5,000 employees.

PTR's business has experienced rapid growth during recent years, documented by several indicators, including the opening of many new stores and the growth of its workforce and net operating revenues. The expansion to other countries of the European Union and Latin America is foreseen in the coming years.

Currently, the business areas general management processes are coordinated by the Shared Services Department (SSD), supported by an existing information system (PTR-IS), including, among others, the subsystems of financial management, warehouse management, supplies management, sales control and human resources management.

As a natural consequence, digital transformation is seen as a critical path for adapting the company to the rapid growth and demands of a market characterized by aggressive competition. This transformation aims at the dematerialization of documents; the implementation of workflows to support process reengineering, the automation of services in stores, including stock management and payments management. These are essential transformation vectors for maintaining competitiveness based on low prices.

The transformation encompasses, in addition to required organizational changes, a vast set of new information systems, capable of supporting all *PTR* processes. To ensure an efficient management of those new projects, a project management methodology (PMM) was developed by an external consultant, training was given to a selected group of middle managers and current project managers. Also, it was created the projects support office (PSO) to support the *PTR* project management practices and ensure the project managers continuous development. The implementation of project management, in the context of management dynamics summarized above, is the implementation of a project management information system (PMIS) capable to make project management processes intuitive and easy to use, integrating with the relevant *PTR* information systems.

Business objectives

The expected benefits of implementing PMIS, six months after the project's completion, are:

- Make project management more user friendly and intuitive.
- Facilitate organizational communication and give visibility of ongoing projects.
- Enable the creation of historical information to support the planning of future projects.
- Allow the reduction of projects' deadlines and cost variances by 20%.

Scope

PMIS should be developed using an application framework of document management, with a workflow engine, and able to configure the processes and templates defined in the PMM and the PSO required back-office tasks. The document management solution implementation was contracted to *FITS*, after a selection process conducted by the Purchasing and IT departments.

Note: Your Group is the FITS project team

In addition to the system configuration, PMIS shall integrate with the financial information system to ensure the management of purchases and customers invoicing related with the projects execution. The integration with the human resources information system should also be considered to ensure alignment with the organizational structure and compliance with the existing approval policies.

The project should also include:

- Training PSO staff (estimate 3 in Lisbon)
- Training project managers (estimate 10 in Lisbon and 6 in Porto)
- Make available a set of *reports and dashboards*, to be defined by PSO. Given the difficulty of specifying requirements to this component, essential for the project's portfolio management, the *reports and dashboards* will be developed following an agile approach, through the SCRUM life cycle model, considering 3 sprints of 2 weeks each.
- A one-month pilot will be executed to assess the PMIS operability.

Time

The project plan must be submitted for approval before March 25th, 2023.

The operation phase begins with a one-month pilot, immediately after the acceptance tests approval.

The system shall be operational five months after the project plan approval, with a tolerance lower than one week.

The contracted company (FITS) must offer a minimum warranty period of three months, from the pilot conclusion.

Cost

The project has an approved budget of € 200,000, including the *PTR* internal costs.

The contract with *FITS* was awarded a final price of € 130,000 (including the required hardware, software and services).

The project cost variance shall be less than 5%.

Quality

The following requirements shall be met:

- Number of non-conformities, during acceptance tests – less than 10%.
- Time to correct non-conformities - less than 24 hours.
- Evaluation of training sessions - not less than 7.5 (scale from 0 to 10).

The system must comply with the following usability requirements:

- Understandable.
- Easy to learn.
- Easy to use, not requiring specific training for *PTR* employees.

The new solution must be able to work both on local facilities and in the "cloud". When used in the "cloud," document-specific security management, confidentiality, and authorization can be configured by parameterization, to comply with *PTR*'s security policy.

Main deliverables

- PMIS, available in the quality and production environments.
- Requirements specification document.
- Technical documentation.

- Additional manuals and training materials.

Organisation Constraints

The supplier, *FITS*, will appoint a project manager who will report to the PTR project manager. The supplier shall prepare a project team with the appropriate skills.

The PTR project team will be organized as defined below:

- Project Sponsor: The Administrator accountable for PTR business operations
- Project Manager: to be appointed by the SI Director.
- Product Owner: The Director of PSO. It is responsible for defining and reviewing PMIS requirements and for evaluating the project results. Coordinates a team with 2 PSO specialists.
- The SSD Director will appoint:
 - A coordinator a team with an invoice control specialist; a purchasing control specialist and a human resources specialist.
- The IS Director will appoint:
 - A technical coordinator, responsible for the interfaces of applications and IT infrastructures. Coordinates a team with a system security specialist and 2 programmers.

PTR will be responsible for developing the integration of PMIS with PTR-IS, namely with human and financial resources modules.

General Technical Requirements

The system shall meet the following conditions:

- Capacity to handle a minimum of 1,000 simultaneous accesses with the following response times:
 - Query transactions - less than 5 seconds.
 - Updating transactions - less than 15 seconds.
 - Full traceability of documents and recovery capacity.
- Maintenance:
 - Traceability
 - Ease of change
 - Stability
 - Testing capability

Security requirements

The PTR safety standards shall be strictly complied with by the supplier. Access to facilities and equipment requires prior authorization from the local manager.

The system will ensure:

- Access security control
- Incremental backup
- Transaction recovery

Other constraints

The necessary hardware and infrastructure will be installed by the vendor at *PTR's* headquarters.

Location

All project development activities not requiring interaction with *PTR* staff should be executed at the contractor's office.

All interactions with *PTR* will be through the Lisbon office. The training of key users will be delivered in Lisbon and Porto.