# R&D Project Portfolio Management System

**Purpose:** To meet with the client and identify the requirements and work tasks for the R&D Project Portfolio Management System

The client wants to provide an opportunity for every student to work on an industry project.

There is a **coordinator role** that finds projects from industry

Some come from internal staff as well

There is a SharePoint system in place for putting projects on

Two **paper leader roles** who review the projects to ensure that the projects are achievable and able to be related to the BCIS majors.

Then they are listed and sorted and made available to **students**.

There is an expression of interest document that students complete and send through to choose their top 5 projects from the published list

Then the **paper leaders** assign students to a team based on their major, GPA and expression of interest.

Then **mentor role** and **moderator roles** are assigned to each of the teams.

**Students** get a letter assigning them to a team with contact details of the project, mentor and moderator.

Lot of stuff done manually.

We have a semi-automated system and want to automate as much as possible.

Team’s tasks:

To investigate what we have in place currently and to document that properly? *<ask what document properly means to the client>*

Find out what are the issues and challenges are and who are the key stakeholders

Based on your analysis identify the business processes and write up a report <First key deliverable 1> on that. 1st deliverable. *<expect to include a presentation to the client of the report and for some revisions based on their feedback>*

Next thing to do is to investigate an ideal or model project portfolio system. See the web and library.

Collect that information and make a 2nd report <Second key deliverable 2> include looking at the software that is available to manage the portfolio that can automate the entire system.

Identify the advantages and disadvantages

Extract information – dashboarding how many in what major, who are the good industry clients, who gives us lots of projects, what kinds of projects are good?

Identify what the system can provide in terms of the paper leaders having good information around R&D paper delivery so that we can prepare and deliver the R&D papers better.

*<expect to include a presentation to the client of the second report and for some revisions based on their feedback>*

With that information we can use from the system that can advise students and staff what kinds of things are demanded for in the industry over time.

Reporting and dashboarding features

What we are asking you to do is to investigate and ideal solution for the needs of the client.

Reporting an important component.

Look at some of the common portfolio systems – pick up 3-4 most common ones, evaluate them, then to learn the key features. You can then propose a portfolio management system for the R&D system

This is mostly a Business Analysis (BA) and System Analyst kind of work and then feasibility study to identify a suitable portfolio management system. *<Find, read and follow a BA or Feasibility Analysis Methodology>*

No need to make software – maybe look at feature identification – possibly undertake some prototyping in semester 2 *<Third and Fourth Key deliverables – a) a prototype design document*, and *b) a prototype system in the language stack of your choice>.*

At the moment, the AUT SharePoint system is being used – requires an AUT account with the right privileges – <has a lot of other disadvantages – you can use this to identify the current features to keep and also collect comments on the advantages and disadvantages from the stakeholders identified above>.

The system is currently semi-automated – uses email.

Your purpose on this project is To investigate and to propose the requirements for an ideal R&D Project Portfolio Management System.

Requirements for producing 2 x Reports plus some Designs and Prototyping in part 2.

Writeup a team contract

Meeting with your client and mentor (agenda/minutes)

Take the personality tests and share your team skillsets to create the skills matrix for your proposal

List all research work or required investigation for fact-finding and identify all plans/documents needed for the proposal.

Create an overall schedule for the next 5 weeks so that a project proposal is ready for presentation by week 6 (teaching week).

Create a team schedule for the week and M/C (for all weeks)

Start an outline of your proposal

Worklog (individual) to be updated daily

Create a team Portfolio section on a cloud repository - everything you do regarding project work must go in the portfolio (including evidence of work outcomes) - update on a real-time basis.

Plans to be provided for the proposal

Note- the upfront part of your proposal (various sections & the cover page) should not be more than 10 pages (maximum). The proposal must have all the plans in the Appendix.

Plans that need to go in the Appendix of the Project Proposal:

Business Case

Stakeholder register

Stakeholder management strategy

Project charter including roles and responsibilities (must include a Team Leader)

Team contract

Risk register (version 1)

Issue register (version 1)

Milestone report (version 1)

Communications management plan & communication stakeholder register

Change management plan

Scope statement

Work Breakdown Structure (WBS)

Project schedule – A Gantt chart in Microsoft Project based on all the tasks listed in the Work Breakdown Structure (WBS)

Quality assurance plan