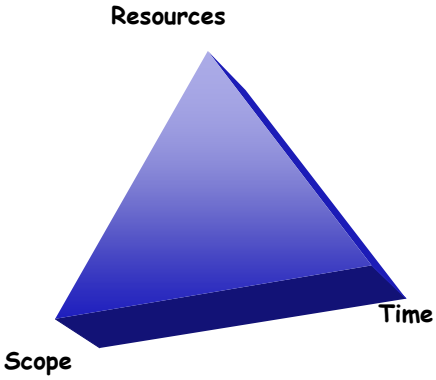


What do we do?

(or scoping the project)

scope [noun] *- \'skōp\ - Italian scopo meaning purpose or goal; 1) intention; object; 2) space or opportunity for unhampered Motion, action, activity, or thought*
- Merriam – Webster

When first time project managers define the "scope" of a project, they usually think of time and cost. That shouldn't be. The time it takes to finish a project and the cost that will be incurred by a project is a result of identifying what will and won't be done (in other words the **scope**). Get the scope wrong, then everything will be wrong.

The Project Management Book of Knowledge (or the PMBOK) differentiates between two types of scope: the **product** scope and the **project** scope. A **product scope** "identifies the features and functions that characterize (or make up— *sic)* a product or service (offered or sold to a customer — *sic*)". For example, if a company is making a new laptop model, one of the product scopes would be the durability of the laptop, the configuration and the aesthetics of the product.

A **project scope** on the other hand identifies the "work that must be done to deliver a product with the specified features and functions (defined in the product scope — *sic*)". Going back to our example, the project scope would involve the tasks of designing the product, manufacturing the product, and testing the product. For purposes of our discussions, when we talk about scope, we mean the project scope

Q: Imagine that you are going to manage a training for students, identify five questions that you can ask to determine the product scope and the project scope.

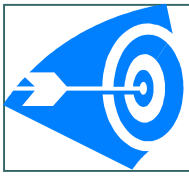
Your questions:

As per the American Management Association (or AMA) Handbook of Project Management, a comprehensive and good project must have a **scope documents** that answers the following questions:

- Why is the entity doing the project? The company must justify why the project must be executed. This question should also address the question of **value**. Of what value does the project contribute to the entity?
- What is the actual project or product that must be executed or developed? This should contain a brief description of what must be done.
- How and what activities should be done? This lists down the deliverables and milestones of the project.
- What are the objectives and the quantifiable criteria or measure of success of the project?
- What are the assumptions of the project?
- What are the limitations and constraints on the project?

Other sources also state that a good scope/scope document must have the following characteristics:

- SMART— Simple, Measurable, Assignable, Realistic, and Time Bound
- Should be written in a concise, clear, and non-technical manner for everyone involved in the project to understand.



A Word on Objectives and Measures of Success

A little definition is in order at this point in time. **Objectives** are the reasons for the client undertaking the project. **Measures of Success** are the criteria that show the impact of the project on the business and are tied into the objectives and goals.

A project's **objective** may be to *reduce processing time to enlist students into their courses*, but it begs the initial question, "By how much?". Other questions that would follow because of the vagueness of the objective would include "Should this consider only college students or collage AND graduate students?", "What courses should they be able to enroll in? " These questions would eventually hound the project in it's later phases.

Measures of success ensures that there are "conditions of satisfaction" by both parties that enables them to conclude that the project is successful. The measures of success may be quantitative or qualitative, but they have to be OBSERVABLE. So a **measure of success** related to our objective would be : *"The enlistment process of college and graduate students in all their courses should be reduced by 30% from the time they start up to the time they confirm their class schedules."*

Case Study

Instructions: Below is an actual scope document from a PM Group. You are to critique the scope document by determining it's good points and bad points. In the end, give a letter grade for this document.

Case Management System for the Regional Trial Court

Business Environment

Most courts in the Philippines are still running using manual processes. There have been plans to implement IT solutions to the court process but political issues, expensive costs and user resistance have hindered this transformation. Currently, the Supreme Court also shares the vision of a centralized court system but political and budget issues have barred this vision from fully materializing.

Judge Ronaldo Martin of the Regional Trial Court of Antipolo- Branch 73 was enlightened by Judge Marivic Daray, a judge who pioneered an implementation of a case monitoring system in her trial court, and had decided to implement one for his own court to achieve his vision more sooner than later.

The Problems

The Regional Trial Court of Antipolo- Branch 73 had been experiencing many problems to date stated as follows:-

- *Manual data recording.* The manual recording of data per case made their progress slow as it lead to a backlog of cases.
- *Burden.* Judge Martin has stated that he had trouble reading through thick stacks of cases and wanted to obtain the case summary or whatever information on the case he wanted easier and quicker.
- *File Organization.* Cases are documented and stored in folders. These are difficult to organize and retrieve when needed. In fact, they are overflowing from their shelves, whilst some have no shelf space anymore and are simply piled up on the floor.
- *Outdated Technology.* The technology used by the court does not allow them to advance since they use Pentium I, Windows 95 computers.

Describe the Opportunity

The direct beneficiaries of the project are the employees of the Regional Trial Court of Antipolo City, Branch 73, Office of Judge Martin. Judge Martin handles approximately 3,000 cases annually, each of which comprises loads of information, which he has to go through every time that a particular case has a hearing. With the current system of having the records stored as hard copies in folders, searching for the needed documents alone was prolonged. In addition to this, perusing over it to go over the important details of the case becomes tedious, time-consuming, and distracting in the event that the judge has to pay attention to the hearing at the same time. Given the proposed system of having an electronic storage for all the documents pertaining to the cases, it will bring a fast and efficient way of searching and reviewing files. As such, the time saved by the employees can be utilized to focus on other matters.

Project Background

Project Summary

EASYSTEMS was to implement a case management system for the Regional Trial Court of Antipolo. Through the project, the presiding judge of Branch 73, Hon. Ronaldo Martin wished to promote an improved system for the Regional Trial Court to ensure a faster and better data organization. As part of this the Regional Trial Court of Antipolo Branch 73 wishes to establish the following objectives included the delivery of a system that:

- Enables the recording of new cases, updating and viewing of case information
- Allows the addition of case activities per case
- Enables searching for the cases via the search engine
- Provides a court calendar for court calendar events
- Has the ability to manage user accounts
- Aside from the system itself, the project has the following additional stages: installation, networking and training.

Rationale

The creation of a Case Management System for Regional Trial Court of Antipolo Branch 73 will provide a much improved system that can handle a large amount of data without compromising data integrity and security. With the features stated above, Branch 73 will have a system that will work to their advantage and be in line with their objectives of computerizing their operations.

Limitations

- Data Encoding: The team will not be responsible for encoding all the data for the system due to time constraints. The team will only encode a sample of real data which will be available when the system goes Live. All encoding of data will be done by the courts encoders. The group will be responsible to set the schedule for the encoders.

- Other functions: The team will not conduct or participate in any annual strategic planning workshops, quarterly review of accomplishments, monthly team-blinding activities to be held by the trial court.

- Procurement: The potential hardware to obtain shall be based on criteria for procurement. It will be done by Regional Trial Court, Branch 73 but plans will be done by the project team.

- Training: The team will only train the Client users i.e. the staff of Judge Martin who will use the system

Project Objectives and Measures

	Objectives	Measure(s) of Success
Project Financial	To implement the system and training not exceeding the budget given by the Regional Trial Court of Antipolo.	Expenditures must not exceed the allotted budget
Project Timing	To implement the system within the set schedule.	Project implementation must start at the end of October 2006. System must be done by the fourth week of January.
	To train the users within the set schedule	Training must be held within the first week of February
	To handover the project to MISA within the set schedule	Handover of the project to MISA must be Feb 12 2007.
Project Quality	To implement a system that will allow quick access to case information	All main functional requirements of the system should be met The system must garner an average rating ranging from 70-80%
	To create a searchable database of case information according to date, case number, plaintiff's name and defendant's name.	The search function of the system should display the correct search results
	To be able to transfer all relevant knowledge about the system to its would be users	The system training must garner an average rating ranging from 70-80%
	To ensure data integrity and confidentiality of the system	Only authorized personnel could have access to information generated by the system
Consumer Communication	To provide series of updates to the client, Judge Martin, regarding the project through the project manager	Full compliance with communications plan

Question: What are your positive and negative comments regarding the scope document you just read?

Your answer to the question

Without a problem, there is no project. Where there is a problem, however, there is a stakeholder who is desperate for a solution and who has a delivery deadline — which is normally sometime yesterday.
- Joe di Stefano

The Problem with Scope..

s that everyone has an opinion as to what should be done, but no one remembers what has been agreed upon. Various sources cite the following reasons why there will be problems with the project scope:

- The scope was unclear and ambiguous.
- The scope was incomplete and did not consider everything that has to be done.
- The scope was created without the involvement or knowledge of the stakeholders.
- The scope was created with the mindset that it is flexible enough so that it can be "adjusted" later on.

As the project is under way, there may be a tendency for other tasks, activities, or objectives to be included in the project that were not originally stated in the project scope. This may result in a delay in the schedule or additional expense. This tendency of the project scope getting bigger because of the additional tasks is called **scope creep**.

Unfortunately, **scope creeps** are natural in a project. I used to think that it is bad, but in IT projects, there may be things that have not or cannot be forseen at the start of the project — no matter how experienced the project manager is. The best managers do not turn their head away from scope creeps, rather they manage it well.

"There is no such thing as a scope creep, only scope gallop!"
-Anonymous

Scope Management is the process by which we control or totally avoid scope creep. It will involve:

- Involving all the stakeholders — both internal and external interfaces — at the start of the project
- Identify what they expect from the project and have them collectively agree on it
- Make all agreed upon objectives, goals and measures of success quantifiable or measurable.
- Documenting the scope and disseminating the scope document
- Have a mechanism by which the scope can be changed *(to be discussed in Change Management)*

Case Study : Bringing CS21b Online

With a lot of businesses recognizing that the Internet is becoming more and more a necessary marketing and sales tools, it is no surprise that a programming language like Java would be one of the technical requirements that a software development company would look for in a fresh graduate of Computer Science. In response to this, the Department of Information Systems and Computer Science decided to teach Java as an introductory programming language to their Computer Science and Management Information Systems students. Previously, the department used C as an introductory programming language. The decision to shift from C to Java was made last November 1996 in a curriculum review participated by past and present instructors of the department plus invited speakers and professors from other departments and universities.

In the second semester of SY 1997-1998, Mr. Paolo Algoro, Dr. John Paul Vergara, and Mr. Mike Chiong taught CS 21b, Introduction to Computing II. CS 21b is the second of a two-part introductory course, that teaches Computer Science and Management Information Systems students to program in Java. Over 200 freshman and sophomore students combined took CS 21b. Realizing this, the faculty decided to standardize the content and the way the course is taught. Assisting them were two student assistants whose main role was to check projects, exams and take-over a class during lab exercises, so that the faculty members can concentrate on creating the standardized content.

Traditionally, the faculty prepare their own content, materials, and exams based on a standardized curriculum. The end result would be that one faculty member may have discussed one topic, while another may have skipped the topic altogether. They were also highly dependent on the secretary to photocopy or mimeograph the documents that they need in class. With more than 200 students, the faculty did not want to burden the secretary to photocopy, sort, and collate the documents.

Since Java naturally lends itself to the Internet and it is the programming language being taught, the faculty put up a website that would showcase the use of Java on the Internet. It will also be a repository of all the notes, seatworks and homeworks, lab and programming exercises/projects, and even sample source codes. Several of the notes though need to be scanned or digitized before it can be posted on the web.

Although they agreed that the website could grow into an e-learning environment where students can submit their assignments and projects online and even take quizzes online, the group wanted to start with something simple. They identified several key functionalities that would be present in the first version of the website:

- That it be a repository of all the notes, exercises and source codes that the students will be use in class.
- That it be a portal for the CS students that will point them to other web sites that focuses on Java.
- That it allow for programs to be submitted online

Dr. Vergara contacted you this morning and would like you to present a project proposal to him ASAP. He wants the website up and running by the start of the second semester. He is not willing to shell out money for this endeavor but is willing to credit your work as a "free elective."

Question:

Using the facts stated in the case, answer the following questions:

- Why is the entity doing the project? Of what value does the project contribute to the entity?
- What is the actual project or product that must be executed or developed?
- How and what activities should be done?
- What are the objectives and the quantifiable criteria or measure of success of the project?
- What are the limitations and constraints on the project?

Your answers to the questions here.