Project Manager Operations Manual (v1.0)

Company: Global Tech Solutions Inc. **Tool:** Nexus Project Management Platform **Effective Date:** July 1, 2025 **Document Owner:** Project Management Office (PMO)

1. Project Initiation

- **1.1 Project Request Form:** All new projects must be initiated via the **PR-001 Project Request Form**, which is located in the Nexus forms library. The form requires a business case summary of no less than 250 words.
- **1.2 Approval Workflow:** After submission, the form is routed to the Project Sponsor. Approval is a three-tiered process:
    1. Project Sponsor endorsement.
    2. Department Head approval from all departments involved.
    3. Final sign-off by a designated PMO representative, with a deadline of **72 hours** from receiving the request.
- **1.3 Project Naming Convention:** All project codes must follow the format [3-Letter Department Code]-[YYYYMMDD]-[3-Digit Number]. For example, a marketing project started on January 15, 2025, would be MKT-20250115-001.

2. Task Management and Workflow

- **2.1 Task Prioritization:** All tasks must be assigned a priority level from 1 to 5, where **1 is Critical** and **5 is Low**. Critical tasks must have an estimated time of completion (ETC) of less than 24 hours.
- **2.2 Status Codes:** The following status codes are mandatory for all tasks:
    - **01-Backlog:** Task is created but not yet assigned.
    - **02-In Progress:** Work has started.
    - **03-In Review:** Work is complete and awaiting a QA check.
    - **04-Blocked:** Task cannot proceed due to an external dependency. A note is required with the reason and expected unblock date.
    - **05-Complete:** Task is finished and closed.
- **2.3 Escalation:** If a Critical task remains in an "In Progress" or "Blocked" status for more than **48 hours**, an automatic alert will be sent to the project manager and the assigned team lead.

3. Reporting and Analytics

- **3.1 Standard Reports:** The Nexus platform has three standard, automated reports:
  - **Weekly Status Report (WSR):** Automatically generated every **Monday at 9:00 AM PST**. This report summarizes project health, task progress, and key metrics.
  - **Quarterly Budget Report (QBR):** Generated on the **first business day of each quarter**. It provides a detailed financial breakdown of all active projects.
  - **Risk Mitigation Report (RMR):** On-demand report showing all risks rated as **"High" or "Extreme"** on the risk register.
- **3.2 Report Distribution:** The WSR is distributed to the project team and sponsor. The QBR is distributed to the project sponsor and finance department.

4. Financial Management

- **4.1 Budget Allocation:** All projects are assigned a budget from one of two pools: **Pool A (Marketing Initiatives)** or **Pool B (Technical Debt)**.
- **4.2 Cost Codes:** All expenses must be logged with one of the following five-digit cost codes:
  - 10101: Personnel
  - 10102: Software Licensing
  - 10103: Third-party Services
  - 10104: Travel and Expenses
- **4.3 Expense Approval:** Any single expense exceeding **$2,500** must be approved by the project sponsor and a PMO director. Expenses over **$10,000** require an additional signature from a Vice President.

5. Risk and Issue Management

- **5.1 Risk Register:** A project's risk register must be updated at least **once every two weeks**. Each risk must be assigned a probability and impact score from 1 to 5.
- **5.2 Risk Scoring:** The total risk score is calculated by multiplying the probability and impact scores. A score of **16 or higher** is classified as an "Extreme" risk and requires immediate escalation.
- **5.3 Issue Log:** All issues (realized risks) must be logged in the issue tracker. Each issue must have an assigned owner and a resolution plan with a due date.

6. Stakeholder Engagement

- **6.1 Meeting Cadence:**
    - **Daily Stand-ups:** Mandatory for all project team members, held at 9:00 AM local time, with a strict **15-minute** timebox.
    - **Weekly Check-in:** A one-hour meeting between the project manager and the project sponsor, held every **Friday afternoon**.
- **6.2 Communication Logs:** All key decisions and action items discussed in meetings must be logged in the project's communication log within **24 hours** of the meeting.

7. Project Closure

- **7.1 Closure Criteria:** A project can only be formally closed when all tasks are complete, all invoices are paid, and the final deliverable has been signed off by the project sponsor.
- **7.2 Final Documentation:** The project manager must submit a **"Project Post-Mortem Report (PPMR)"** to the PMO within **14 business days** of project completion. The report must contain at least three lessons learned.
- **7.3 Archiving:** All project documentation, including the PPMR, must be archived to the company's secure network drive and retained for a minimum of **3 years**.

8. Glossary

- **ETC:** Estimated Time of Completion
- **PMO:** Project Management Office
- **PPMR:** Project Post-Mortem Report
- **PR-001:** Project Request Form
- **QBR:** Quarterly Budget Report
- **RMR:** Risk Mitigation Report
- **WSR:** Weekly Status Report

9. Resource Allocation

- **9.1 Resource Request Process:** Project managers must submit a **Resource Request Form (RR-001)** at least **3 weeks** prior to the anticipated need for a resource. The form must specify the role, required skill sets, and the duration of the assignment.
- **9.2 Resource Types:**

    - **Dedicated:** Resources assigned to a single project for a specific duration (e.g., a full-time developer).
    - **Shared:** Resources who contribute to multiple projects (e.g., a UX designer). Their time must be booked in 4-hour increments.
- **9.3 Approval:** Resource requests are approved by the relevant Department Head and PMO Director.

10. Change Management

- **10.1 Change Request:** Any change to a project's scope, budget, or timeline must be submitted via a **Change Request Form (CR-001)**. The form requires a detailed explanation of the change's impact and rationale.
- **10.2 Approval Workflow:** The CR-001 is routed for approval. Changes under **$1,000** or with a timeline impact of less than **3 business days** can be approved by the Project Sponsor. Larger changes require a full review by the Change Control Board (CCB), which meets every Tuesday.
- **10.3 Versioning:** All project documentation must be updated with a new version number (e.g., v1.1) upon a change request approval.

11. Quality Assurance (QA)

- **11.1 QA Process:** All project deliverables must undergo a formal QA process. The QA team requires at least **5 business days** for testing before final sign-off.
- **11.2 Required Artifacts:** Before submitting a deliverable for QA, the project manager must ensure the following artifacts are attached:
    - Test Plan document.
    - Use Case scenarios.
    - A completed "Ready for QA" checklist.
- **11.3 Bug Reporting:** All bugs found during the QA process must be logged in the **Jira bug tracking tool** and assigned a priority level.

12. Communication Matrix

- **12.1 Internal Communication:**
    - **Team Status:** Daily stand-ups (15 minutes) and a weekly check-in via video conference (30 minutes) on Friday.

    - **Project Health:** A weekly status report is sent via email every Monday at 9:00 AM PST.

- **12.2 External Communication:**
    - **Client Check-in:** A bi-weekly client meeting is held every other Wednesday for one hour to review progress.
    - **Escalations:** Urgent client issues must be escalated via a dedicated Slack channel with the prefix #proj-esc.

13. Time Tracking and Billing

- **13.1 Time Entry:** All billable project resources must log their time daily in the **Replicon time tracking system**. Time entries must be submitted no later than **10:00 AM PST on Monday** of the following week.
- **13.2 Billing Categories:** Time must be logged under one of three categories:
    - Direct_Project_Work: Time spent on tasks directly for a client.
    - Overhead_Admin: Internal project management activities.
    - Training_Professional_Dev: Time spent on skills training.
- **13.3 Billing Cycles:** Client invoices are generated on the **1st and 15th of each month**.

14. Vendor and Contract Management

- **14.1 Vendor Onboarding:** All new vendors must be onboarded through the company's vendor management system. A valid **W-9 form** and a Certificate of Insurance are required.
- **14.2 Contract Review:** All contracts over **$5,000** must be reviewed by the legal department. The review process has a target completion time of **7 business days**.
- **14.3 Invoice Approval:** All vendor invoices must be approved by the project manager and submitted to the accounts payable department within **5 business days** of receipt.

15. Post-Project Support

- **15.1 Hand-off:** At the end of a project, the project manager is responsible for a formal hand-off to the **Customer Support Team**. This includes a 2-hour knowledge transfer session and all project documentation.

- **15.2 Support Period:** The project team will provide direct support for a period of **30 days** post-deployment. After this period, all issues must be routed through the standard support ticket system.

16. Reporting and Dashboards

- **16.1 Project Health Dashboard:** A live dashboard showing key project metrics is available in Nexus. It refreshes automatically every **15 minutes**.
- **16.2 Financial Dashboard:** The Financial Dashboard, available in Power BI, shows real-time budget burn rate and forecasts. It is refreshed daily at **8:00 AM PST**.
- **16.3 Risk Dashboard:** The risk dashboard is an on-demand report showing the status of all risks. It is updated when the risk register is updated.

17. Security Protocols for PMs

- **17.1 Account Management:** Project managers must request and de-provision access for team members using the **IT-S03 Access Request Form**.
- **17.2 Data Handling:** Confidential client data must be stored only on the company's secure network drive. It is prohibited to store client data on personal devices or laptops.
- **17.3 Password Policy:** Project managers must enforce a minimum password length of **12 characters** for any external vendor tools used for project collaboration.

18. Knowledge Management

- **18.1 Knowledge Base:** The company's knowledge base is maintained in **Confluence**. Project managers are required to create a project space for each new project.
- **18.2 Required Documentation:** The following documents must be created and maintained in the Confluence space:
  - Project Charter
  - Stakeholder List
  - Meeting Notes
  - Lessons Learned Log
- **18.3 Document Approval:** A completed project space must be reviewed and approved by a PMO Director before the project can be formally closed.

19. Tool Integration

- **19.1 Nexus Integrations:** The Nexus platform has out-of-the-box integrations with **GitHub for code management** and **Salesforce for client data**.
- **19.2 New Integrations:** Any new tool integration requires a formal request to the IT department via the **IT-S05 Integration Request Form**. The form requires a business case and an estimated cost.

20. Policy Updates

- **20.1 Policy Review:** This manual is reviewed and updated annually by the PMO. The next review is scheduled for **July 2026**.
- **20.2 Communication:** All material policy changes will be communicated via corporate email to all project managers at least **2 weeks** before the effective date.
- **20.3 Versioning:** Policy manual updates will follow a major.minor versioning system (e.g., v1.1, v1.2).

21. Sub-contractor and Contingent Worker Management

- **21.1 Onboarding:** All sub-contractors must complete the **Contractor Onboarding Checklist (CON-101)** within **2 business days** of their start date. This includes signing the confidentiality agreement.
- **21.2 Timesheet Submission:** Sub-contractors are required to submit their timesheets weekly via the **Workday portal**, by **3:00 PM PST on Friday**. Timesheets must be approved by the project manager by the following Monday.
- **21.3 Invoice Processing:** All invoices from sub-contractors must be submitted to Accounts Payable no later than the **10th of the month** following the work period.

22. Team Morale and Budget

- **22.1 Budget Allocation:** Each project is allocated a quarterly team morale budget of **$50 USD per team member**. This budget can be used for team lunches, virtual social events, or small gifts.
- **22.2 Reimbursement:** All morale expenses must be submitted via a **Team Morale Reimbursement Form (TMR-202)** and must be accompanied by receipts.
- **22.3 Event Planning:** Team events requiring external vendors must be planned at least **4 weeks** in advance and be approved by the PMO director.

23. Software Licensing and Renewals

- **23.1 Licensing Requests:** Any new software license required for a project must be requested via the **IT-S07 Software Request Form**. The form requires a justification and a cost-benefit analysis.
- **23.2 Renewal Process:** All software licenses are managed centrally by the IT department. Project managers will be notified **60 days** prior to a license's expiration date to confirm if it should be renewed.
- **23.3 Cost Allocation:** The cost of a software license is charged to the project's budget pool. Licenses over **$5,000 annually** must be approved by a Senior Vice President.

24. Accessibility Standards

- **24.1 Compliance:** All project deliverables, especially those for public-facing websites or applications, must comply with **WCAG 2.1 Level AA** accessibility standards.
- **24.2 Testing:** Accessibility testing must be performed on all major user flows. The QA team uses the **Axe DevTools** extension to perform an initial automated scan.
- **24.3 Reporting:** Any accessibility issues must be logged as "Accessibility" bugs in Jira with a priority level of **High**.

25. Data Retention and Archiving

- **25.1 Project Data:** All project data, including source code, design files, and meeting notes, must be retained for a minimum of **5 years** from the project closure date.
- **25.2 Client Data:** Confidential client data must be deleted from all systems and archived off-site to a secure location within **90 days** of project completion.
- **25.3 Archiving Protocol:** The project manager is responsible for ensuring the project folder is zipped, encrypted, and moved to the **/ARCHIVE/** directory on the secure network drive. The encryption key must be logged with the PMO.

26. Stakeholder Feedback Mechanisms

- **26.1 Feedback Sessions:** Project managers must hold a formal feedback session with key stakeholders at the end of each major project phase.
- **26.2 Surveys:** An online survey will be sent to all stakeholders within **5 business days** of a major project milestone. The survey consists of **10 questions** and must be completed within **7 days**.
- **26.3 Post-Mortem Feedback:** The PPMR must include a dedicated section summarizing stakeholder feedback, with at least **3 specific examples** of feedback received.

27. Contractor Offboarding

- **27.1 Offboarding Process:** The project manager must submit a **Contractor Offboarding Form (CON-202)** to IT and HR at least **5 business days** before the contractor's last day.
- **27.2 Access Revocation:** All system access, including VPN, email, and tool access, must be revoked by IT on the contractor's last day of work at **5:00 PM PST**.
- **27.3 Final Payment:** The final payment for a contractor is processed within **7 business days** of the last approved timesheet.

28. Project Audits

- **28.1 Internal Audits:** The PMO will conduct an internal audit of a random selection of **10%** of all active projects on a quarterly basis.
- **28.2 Audit Findings:** Any audit findings must be addressed by the project manager within **10 business days**. A formal "Audit Remediation Plan" is required for any findings rated as "High" severity.
- **28.3 External Audits:** In the event of an external client audit, the project manager is the primary point of contact and must provide all requested documentation within **48 hours**.

29. Change Log and Documentation

- **29.1 Change Log:** All changes to project scope, budget, or timeline must be logged in the project's master change log. Each entry must include the date of the change, a brief description, the approval date, and the approver's name.
- **29.2 Documentation Updates:** The project charter and project plan documents must be updated within **72 hours** of a change log entry being approved.

30. Resource Skills Matrix

- **30.1 Skills Matrix:** Each project must maintain a Skills Matrix in the Nexus platform. The matrix lists each team member and their proficiency level (1-5) in key skills.
- **30.2 Updates:** The skills matrix must be reviewed and updated at the beginning of each project phase and at a minimum of **once every 60 days**.
- **30.3 Training Gaps:** Any skill gaps identified in the matrix should be communicated to the team lead to determine training needs.

31. Vendor Performance Review

- **31.1 Review Frequency:** Project managers are required to complete a formal vendor performance review for any vendor whose contract exceeds **$10,000**. The review must be completed quarterly.
- **31.2 Scoring:** The review uses a scoring system from 1-10 on three key areas: timeliness, quality of work, and communication. A score below **7** in any category requires a formal discussion with the vendor.

32. Project Risk Scoring

- **32.1 Risk Categories:** Risks are categorized into four types: **Technical, Financial, Resource, and External**. Each risk must be tagged with its corresponding category.
- **32.2 Scoring Methodology:** The risk score is calculated as Probability x Impact. Probability is a scale of 1-5, and Impact is a scale of 1-5.
- **32.3 Mitigation Plans:** Any risk with a score of **12 or higher** must have a documented mitigation plan that includes a trigger and a responsible owner.

33. Onboarding of New Team Members

- **33.1 Onboarding Checklist:** The project manager must complete the **Project Onboarding Checklist (PRO-001)** for any new team member within their first day.
- **33.2 Introduction:** The new team member must be introduced to the team via the project's main Slack channel.
- **33.3 Access Provisioning:** A ticket to IT to provision the new team member's access to all required tools must be submitted at least **3 business days** prior to their start date.

34. Budget Monitoring

- **34.1 Weekly Review:** Project managers must review the project's financial dashboard on a weekly basis to track budget burn rate.
- **34.2 Forecasts:** A rolling 30-day budget forecast must be submitted to the PMO at the beginning of each month.
- **34.3 Budget Variance:** Any project with a budget variance greater than **10%** must have a formal report submitted to the PMO director.

35. Quality Gates

- **35.1 Phase Gates:** Each project has three mandatory quality gates: **Concept Approval, Design Freeze, and Final QA Sign-off**.

- **35.2 Gate Criteria:** The Design Freeze gate can only be passed if all key stakeholders have signed off on the design wireframes and prototypes. This sign-off must be completed via the **D-001 Design Sign-off Form**.

36. Escalation Protocol

- **36.1 Level 1:** Team members should first escalate issues to their team lead or the project manager.
- **36.2 Level 2:** Issues not resolved within **24 hours** at Level 1 should be escalated to the PMO Director.
- **36.3 Level 3:** Issues impacting the project's critical path and not resolved within **48 hours** at Level 2 must be escalated to the Project Sponsor and a Senior VP.

37. Project Archival Checklist

- **37.1 Checklist:** Before a project can be formally archived, the project manager must complete the **PRO-ARC-301 Archival Checklist**.
- **37.2 Required Items:** This checklist confirms that the following items are complete:
  - All final documents are in the _FINAL_ folder.
  - All vendor invoices have been paid.
  - The PPMR has been submitted and approved.
  - All sensitive data has been properly encrypted.
  - All communication logs have been downloaded and archived.

38. Stakeholder Communication Plan

- **38.1 Audience and Frequency:** The communication plan outlines the audience, message, and frequency of all key project communications.
- **38.2 Key Communications:** The plan must include details for a minimum of three communications:
  - Project Kick-off Meeting agenda and deck.
  - Bi-weekly Project Progress Report.
  - Project Closure announcement.
- **38.3 Template:** All external communications must use the official **Comm-Template-Nexus-01** template.

39. Team Capacity Planning

- **39.1 Capacity Forecast:** At the beginning of each quarter, the project manager must submit a team capacity forecast for the upcoming 90 days.
- **39.2 Over-Allocation:** No team member can be allocated to projects for more than **120%** of their capacity without written approval from their Department Head.
- **39.3 Report:** The capacity report must be submitted to the PMO director no later than the **15th of the month** prior to the start of the new quarter.

40. Quality of Life Improvements

- **40.1 Feedback Form:** The PMO has a continuous feedback form available in Nexus for suggestions on improving the platform. This form is reviewed on the **first Tuesday of every month**.
- **40.2 Feature Requests:** The PMO will review and prioritize all submitted feature requests. The PMO will communicate the status of a request to the submitter within **15 business days**.
- **40.3 Release Notes:** All platform updates will be announced in the official Nexus Release Notes, which are published to the company intranet on the **first Friday of each month**.