Production, Accounting: Project Setup & Initiation SOP

**Objective/Purpose/ Why: Outline the requirements and process for Project Managers to request a job chargeable project number (EGDV, PLDV) from accounting, and all necessary tasks that must be completed to initiate project.**

**Outcome: A project number within 48 hours of request, completed PMP, and PM Dashboard**

**Subject Matter Expert:** *Project Manager, Project Accountant, Project Controller, PM Dashboard Administrator*

**Process: The process below outlines the process to request an active project number and required tasks after the request is made.**

Setup Request

1. Project Manager will create a folder within the appropriate PROP folder labeled “Project Setup” and save all required setup documents.
   * *Required Documents*
     + *Completed setup form*
     + *Fully executed contract and other contract documents if applicable i.e. PO, etc.*
     + *Marketing approved project description (email approval documented in folder)*
     + *WBS structure with budget allocation*
     + *Microsoft Project schedule*
     + *Additional instructions required for billing i.e., invoice/progress report template, additional forms, billing contacts, etc.*
2. Project Manager will send Project Accountant a project setup request via email with a link to the designated setup folder.
3. Project Accountant will review request and create an active PLDV/EGDV number in Vision within 48 hours if all necessary documents are available. PM is responsible in ensuring all required documents are accessible, and applicable approvals are documented.
4. Once EGDV or PLDV number is created, Project Accountant will send an email to IT requesting for a corresponding project folder be added to the appropriate drive. Project Manager, Deputy Project Manager, if applicable, and PM Dashboard administrator will be Cc’d in the request.
   * Z:\Engineering
   * Z:\Planning

Post Request Activities

1. Project Manager is responsible in moving all project documents from the PROP to the project folder. PM should check within 48 hours of IT request that folder has been created and move all appropriate documents.
   * Fully executed contract
   * Other necessary contract documents, such as a PO, etc.
   * Billing instructions and other billing forms if applicable
   * Schedule
2. If project folder has not been created within the 48-hour timeframe, Project Manager will send follow up email to IT requesting status of folder creation.
3. No later than 1 week of project setup, Project Manager is responsible for completing a Project Management Plan. PMP must be approved and signed by Division Manager.

PM Dashboard Setup

1. PM Dashboard Administrator will be notified of a new project setup via Cc on project folder request to IT.
2. All medium to large projects will automatically have a PM Dashboard template created. Dashboards will be saved in SharePoint > Workload Resources.
   * Medium to large projects are defined by total project budget and duration:
     + >= aggregate of $50,000
3. Project Manager can request for a Dashboard to be created for any project that does not fall in the medium-large category by sending an email request to Dashboard Administrator.
4. PM will be notified via email that a Dashboard template has been created. The PM will then have 1 week to complete Dashboard setup.
   * Setup instructions within dashboard
   * Performance Measurement Baseline

**Resources:**

Accounting Procedures *–*

*Z:\Administrative\POLICIES AND PROCEDURES\Project Setup Accounting Procedures*

Project Setup Form and Instructions *–*

*Z:\Project Delivery System Policies and Procedures\6. Project Execution\Project Setup*

*Dashboard Setup Instructions*

**Definitions:**

*Fully executed contract – contractual document that has been accepted and signed by both Alliance and Client.*

*PM Dashboard – Tool for PM’s to monitor project’s financial health*