

\***NWD** Comments Included. Initiating a  
Project in P2 - PROC1030

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General Comment: The schedule is determined by total project duration and not by workload per FY. Response: Initial schedule is developed based on an assumed fully resourced project; ultimate project duration may be impacted by resource constraints.

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## Scope

This process defines initial procedures for entering a project into P2. A project may be a program, as well as what is traditionally considered a project. These procedures are required before a Project Manager (PM) and Project Delivery Team (PDT) can begin creating the project activities, establishing a schedule, and entering resource estimates.

## Policy

**ER 5-1-11, U. S. Army Corps of Engineers Business Process**

[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er5-1-11/entire.pdf>]

**ER 37-1-26, Issuance and Acceptance of Project Orders**

[<http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf>]

## Responsibility

The Project Manager (PM) is responsible for ensuring the project is established promptly in P2 and CEFMS, and verifying that the project work item has been created.

The System Administrator (SA) is responsible for the creating the project in P2.

## Distribution

Project Manager (PM)\*

System Administrator (SA)\*

## Ownership

The BP/P2 Configuration Manager is responsible for ensuring that this document is necessary, that it reflects actual practice, and that it supports corporate policy.

## System References

*Acronyms and Glossary – REF8000 [REF8000]*

*Civil Works Program-Specific Information – REF8010 [REF8010]*

*Earned Value Management – REF8018 [REF8018]*

*Environmental Program-Specific Information – REF8012 [REF8012]*

*Interagency and International Services (SFO) Program-Specific Information – REF8017 [REF8017]*

*Military Program-Specific Information – REF8011 [REF8011]*

*PMP/PgMP Content – REF8005 [REF8005]*

*PMP/PgMP Development – PROC2000 [PROC2000]*

*Receipt of Funds – PROC1040 [PROC1040]*

*Research and Development Program-Specific Information – REF8013 [REF8013]*

*Work Acceptance- PROC1000 [PROC1000]*

## Activity Preface

This process explains how a project will be initiated in P2. ~~Each project will be defined in one of two categories: future year work, or current year work (refer to *PMP/PgMP Content – REF8005 [REF8005]* (Question – what is the significance of defining current or future year?). Response: Rejected – data required for resource leveling and manpower requirements.~~ This process may also originate from *Work Acceptance – PROC1000 [PROC1000]* (Not clear which other process(es) this process would originate from. Response: Edit Team will evaluate. This involves the PM communicating to the System Administrator the required data needed to continue with the work management process *PMP/PgMP Development – PROC2000 [PROC2000]* and related processes in P2. Note that effort for initiating the project may require the expenditure of overhead funds, however this needs to be closely managed to avoid misapplication of funds. Response: Rejected – project initiation may require the use of overhead funds; this step will not require substantial effort or time, it is the initiation of a project in the system. Detailed project information will be developed during the planning process after funds have been received.

At the completion of this process, a project will have been created in P2, as well as a project work item in CEFMS. At this time, the *Receipt of Funds – PROC1040 [PROC1040]* process needs to be evaluated.

## Project Manager (PM)

1. Receive Work Acceptance from DPM.

Other relevant project background information will also be provided by the DPM.

**If a new project in P2, goto task #2. Otherwise, goto task #5.**

2. Furnish necessary info to System Administrator (SA). Comment – Does this lock in the template? It may be too early to know the appropriate template. Response: You are choosing a template – however, you will be able to add to it.

Information includes appropriate template name/type, etc. The “template” may be an existing project that can be used as a template; this may be more efficient as it may and more completely populate the project with data. Refer to Civil Works Program-Specific Information – REF8010 [REF8010], Military Program-Specific Information – REF8011 [REF8011], Environmental Program-Specific Information – REF8012 [REF8012], Research and Development Program-Specific Information – REF8013 [REF8013], or Interagency and International Services (SFO) Program-Specific Information – REF8017 [REF8017]. Response: Accepted.

Some project information may automatically populate the system from other sources.

## System Administrator (SA)

3. Select and copy Provide appropriate project template or existing project in P2. Response: Reject – SA is picking and copying a template.
4. Enter project information into quick entry setup based on information from Project Manager.

The default status for new projects is ‘New’.

Once the project has been initiated in Oracle Projects, and created in P3e, a link will be established between the two. The CEFMS/P2 Interface will create the project work item in CEFMS. Refer to Financial Management – REF8014 [REF8014].

The PM will be electronically notified that the project has been created in P2. (Will notification be an automatic feature in P2, or will the SA need to initiate the notification?)  
Response: Unknown at this time.

## Project Manager (PM)

5. Review project data in P2 to determine if changes or additions are necessary.

**If changes necessary, goto task #2. Otherwise, goto task #6.**

6. Electronically acknowledge creation of project.

7. Determine if funds have been received.

The PM will verify accuracy of funding data, in accordance with local Standard Operating Procedures.

If funds are received, stop and complete Receipt of Funds – PROC1040 [PROC1040]. Otherwise, goto task #8.

8. Proceed to PMP/PgMP Development process--. (Seems to imply that this should happen even if funds have not been received?) Response: The first step in the PMP/PgMP Development Process (PROC 2000) is to check for funds availability.

End of activity.

Goto PMP/PgMP Development – PROC2000 [PROC2000]. Question chart for funds received, under “no” and proceeding with PMP? Typically would not expend overhead funds for PMPs. Response: The first step in the PMP/PgMP Development Process (PROC 2000) is to check for funds availability.

### Initiating a Project in P2 - PROC1030

