

Initiating a Project in P2 - PROC1030

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

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

[\[http://www.usace.army.mil/inet/usace-docs/eng-regs/er37-1-26/entire.pdf\]](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]*). This process may also originate from *Work Acceptance – PROC1000 [PROC1000]*. 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.~~ **Suggest deleting this sentence or telling us which overhead account is to be used. Response: Non-concur. Per local SOP.**

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).

Information includes appropriate template name/type, etc. The “template” may be an existing project that can be used as a template 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]*.

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

System Administrator (SA)

3. Select and copy appropriate project template or existing project in P2.
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.

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.

End of activity.

Goto PMP/PgMP Development – PROC2000 [PROC2000].