



RUTGERS POLICY

Section: 70.2.15

Section Title: Legacy UMDNJ policies associated with Information Technology

Policy Name: Project Portfolio Management Application Access

Formerly Book: 95-01-05-01:00

Approval Authority: Vice President for Information Technology & Chief Information Officer

Responsible Executive: Vice President for Information Technology & Chief Information Officer

Responsible Office: Office of Information Technology (OIT)

Originally Issued: 12/2/2009

Revisions: 9/28/2011

Errors or changes? Contact: oitpolicy@rutgers.edu

1. **Policy Statement**

The Project Management Office (PMO) utilizes a project portfolio management application to schedule and track projects undertaken by the Project Management Office. All users must be granted access to the application and participate in user training based upon the level of access granted.

2. **Reason for Policy**

This policy defines the procedure for obtaining access to the Project Portfolio Management (PPM) application used by the Project Management Office.

3. **Who Should Read This Policy**

This policy applies to any individual responsible for the management, operation, and/or maintenance of the legacy UMDNJ information technology services and/or environment. If you are uncertain whether this policy applies to you, please contact your direct supervisor.

4. **Related Documents**

N/A

5. **Contacts**

oihelp@rutgers.edu

6. The Policy

70.2.15 PROJECT PORTFOLIO MANAGEMENT APPLICATION ACCESS

Access to the Project Portfolio Management application used by OIT and administrated by the Project Management Office is as follows.

I. Requirements:

Any user requesting access to the Project Portfolio Management application must be formally approved, granted access and receive the necessary training on the application by the PMO Training Staff. Once training has been received, the requestor must provide the required paperwork and approvals to obtain access.

II. Responsibilities:

- A. The PMO will provide training and support for all users.
- B. OIT Project Managers or Management must give all users formal approval to gain access to the Project Portfolio Management system.
- C. OIT Project Managers or Management must sign the access request form to approve user rights.
- D. The Executive Director - Enterprise Solutions or Project Portfolio Management application manager must sign the access request form to approve any administrative access.
- E. A quarterly review will take place to insure all access to the system is still appropriate.
- F. OIT Managers are responsible for notifying the PMO staff of users who should be removed or deprovisioned from the system.
- G. OIT Project Managers are responsible for notifying the PMO of the status of all users at the completion of a project to determine continuation or deactivation of access privileges.

III. Procedure(s)

Steps:

A. New User Setup:

- 1. OIT Project Managers or Management will determine which users will have access to the Project Portfolio Management system.
- 2. The selected user will complete the access request form and submit the form to their OIT Manager or the Project Manager for the project assigned.
- 3. OIT Project Managers or Management will determine the level of training required and schedule training for users of the Project Portfolio Management system.

4. OIT Project Managers or Management will fill in the appropriate user type and rights on the access request form. The user types available are: Full User, Request User, T&E User, and Team User. The rights available are: On Account Team, On University-wide Team, On Resource Team, On Portfolio Team, Timesheet, Expense Manager, Fixed Bid Manager, On Link Arena Team, and View Internal Costs. (For details on user types, see [Exhibit A.](#))
5. OIT Project Managers or Management will sign off on the user request form giving users formal approval for access.
6. If administrative access is necessary, the access request form must be signed by the Executive Director - Enterprise Solutions or the Portfolio Management application manager giving approval.
7. OIT Managers will forward the access request form to the Project Portfolio Management system administrator. Once the request form is received, the user will be entered into the system and their managers will be emailed a username and password.
8. New users will receive their scheduled training from OIT Project Managers, Management or the PMO Trainer.
9. The OIT Project Managers, Management or Trainer will sign off on the access request form validating that training has been completed.
10. The OIT Project Managers, Management or Trainer will return the completed access request form to the Project Portfolio Management system administrator to be archived.

B. Quarterly Review:

1. The Project Portfolio Management system administrator should run the report "last log in" of all inactive users.
2. All users who are currently not working on projects or have not logged into the system for more than six months will be removed from the system.
3. To remove users from the system, see De-provision Users below.

C. De-provision Users:

1. Managers/Project Managers inform PMO when projects come to completion and resources no longer need access to the PPM system.
2. The PPM administrator also reviews the Separation Report daily to ensure that individuals who have left the University have been removed from the system.
3. The PMO follows a policy and procedure for de-provisioning users; please refer to the University's Access Control Policy (in development), Cancellation of Access to University Assets Policy, and Canceling Access to and De-Provisioning OIT PMO Assets Procedure documents for more specific information.

IV. Exceptions

Exceptions to this policy must be approved by the Executive Director - Enterprise Solutions.

V. Non-Compliance and Sanctions

Failure to comply with this policy may result in denial or removal of access privileges to the University's electronic systems, disciplinary action under applicable University policies and procedures, civil litigation, and/or civil or criminal prosecution under applicable state and federal statutes.

VI. Exhibit

[Exhibit A – Innotas User Rights](#)

Exhibit A

INNOTAS User Rights

Full User – Gives the User general access to the system. All tabs are displayed. The User has access to items whether or not they are on the Team of that item. Items can be edited and/or deleted.

Team User – User has limited access to the system. Only the My Arena and Reports tabs appear. The User can only view items associated with their Team.

Time and Expense User – Allows the user to enter time and expenses for the items associated with their Team.

Request User – Allows the user to submit Requests in the system.

On Account Team – Allows the Full User to add a new Account and new Account contacts.

On University-Wide Team – Grants the Full User the most access to the system (aside from Admin). This User can do everything except add a new Resource/User.

On Resource Team – Full Users can add new Resources and edit existing Resources. User is given the opportunity to staff projects from the Resource area, rather than at the Project area.

On Portfolio Team – Some University-wide privileges are granted with Portfolio Team access. The Portfolio tab is visible and Portfolios can be created.

On Timesheet Team – Expenses can be recorded. The University-wide Manage Time and Expense tab can be accessed. The User has broad access to the Resource records.

On Expense Manager Team – Expenses can be approved by this User.

On Fixed Bid Manager Team – Can view the University-wide, Manage Time and Expense, Manage Fixed Bid tab and Project Fixed Bid tab.

On Internal Cost Visibility Team – User is able to view all costs related to Resources and Projects.