

Project Information Form - Revised

The Project Information form serves the following two functions for projects:

1. Houses detailed information specific to the project
2. Provides a centralized location to capture weekly updates and project progress information

On a weekly basis, throughout the life of an active project, DGS Project Managers are required to verify that all of the information for the project is correct and edit the weekly update fields.

The initial Project Information form is generated by the DGS ProjectTeam Support Team while setting up the project in ProjectTeam. When PMs receive an email that the project has been created in the system, one of the first things that the Project Managers do is open the Project Information form and complete all of the remaining fields with any missing information.

NOTE: There are no fields on the Project Information form that should be blank after the project has been assigned except for **DGS Asst. Project Manager** and that field should only be blank if there is no DGS APM on the project.

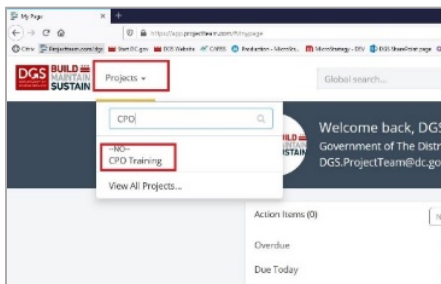
Each week, a clone of the prior week's Project Information form should be created and edited with the updates for the current week.

Since there will be a new Project Information record for each week, the prior week's update information should be overwritten within the new record, and the prior week's update information will exist in the system as the prior week's record, so no data will be lost, and the historic information will always be accessible.

Note: The Project Information form is an internal and controlled DGS record which should not be shared outside of DGS. When saving the form, the autoshare function in ProjectTeam will share it with all appropriate DGS parties automatically. Only the DGS Project Manager, DGS Budget, DGS Asst. Project Manager, or their supervisors (Senior PM or EPM) are authorized to edit the form.

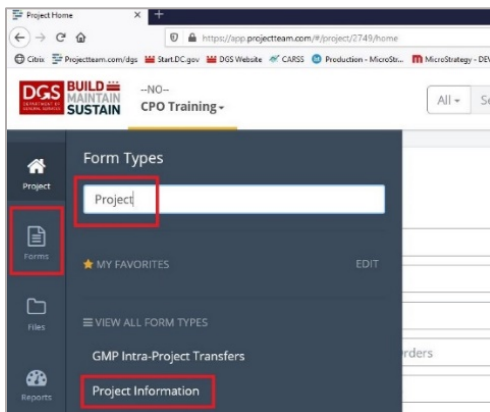
Accessing and editing the Project Information form on your project

1. Open the Project from the Projects list at the top-left of the window. Use the Search function to find the project if needed.

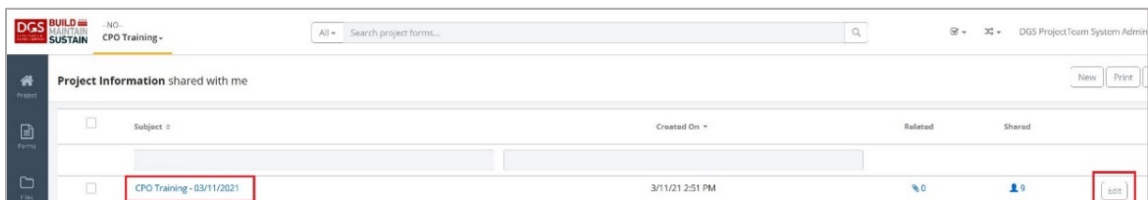


2. Click the Forms icon in the Navigation Bar and begin typing **Project** for the form to appear in the list. Click **Project Information** to open the log.

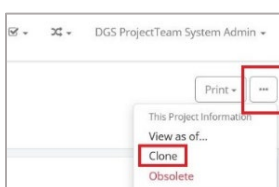
NOTE: Favorite Forms on the project can be edited to include the Project Information form and by clicking the Forms Icon > Edit and then selecting the Project Information button in the Favorite Form Types section.



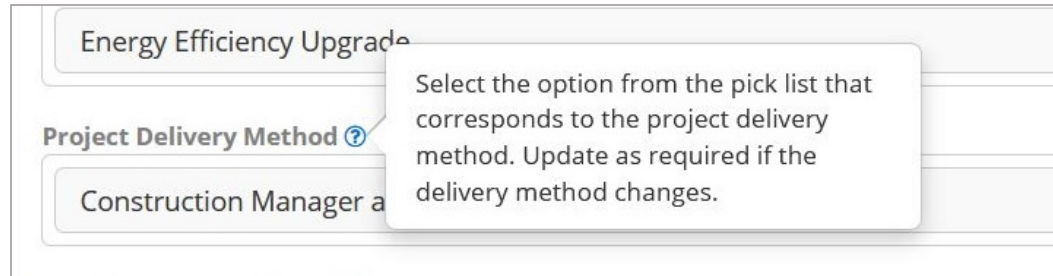
3. In the log view, click on the title of a Project Information form to view it or click the corresponding Edit button to directly open the form for editing.



4. **For the initial Project Information form on a new project**, review the information contained in the form and click on the Edit button (if not already in edit mode from step above) to enter missing information. Fill in any blank fields and save the record.
5. **For weekly updates to the Project Information form**, open the prior week's form from the log view by clicking on the Title of the appropriate form as detailed in Step 3 above, then click the ellipsis button ("...") at the top-right of the window, and select Clone. This will create a new instance of the Project Information form, with all of the previous week's information in it, and open the new form for editing.



NOTE: Each field includes a tool tip outlining the expected use of the field and what information to include. Access the tool tip by clicking on the “?” next to the title for the field in question.



6. Enter the Subject of the form in the **Subject** field. This field will contain the Project Name initially and should be edited in the new form each week using the following naming convention – “Project Information – Weekly Update – DD/MM/YY”

Example: *Project Information – Weekly Update – 03/12/21*

Subject * Required

Type the Subject

7. **Verify** that the Building Information is correct.

NOTE: Do not add or edit Building Information. Contact DGS.ProjectTeam@dc.gov if changes to the Building Information are required. This information is populated from the Archibus Master Building List for DGS and Office of Tax and Revenue (OTR) data.

Building Code	Building Name	Street Address	Ward	Quadrant	State	Zip Code	Building GSF	Lot GSF	Longitude	Latitude	ANC	DC Owned Property	Historic District
HEARS67	Phoebe Hearst Elementary School	3950 37TH STREET NW	3	NW	DC	20008	60084		-77.07195522	38.94072265	3F	<input checked="" type="checkbox"/>	No

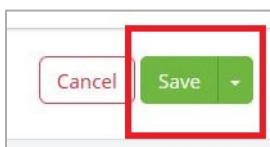
8. Verify that the information in the following fields are correct. Add any missing information or update any outdated or new information. These fields rarely change once completed and only need to be maintained and verified weekly when creating a new update using a cloned form.

Project GSF 35000 Fiscal Year (Initiation) 2021 Project Type Energy Efficiency Upgrade Project Delivery Method Construction Manager at Risk LEED Certification Level 01 - Non-Certified	Client Agency ABRA Client Agency Contact Name John Bunch Client Agency Contact Phone 18014583289 Client Agency Contact Email john.bunch@dc.gov	DGS Project Manager John Bunch DGS Project Manager Phone Number 202-727-2800 DGS Project Manager Email Address dgs.projectteam@dc.gov DGS Asst. Project Manager Susan Mills
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- The following fields should be updated weekly throughout all phases while the project is active. Where there is no information to report, please enter "None".

Completion Level (Percentage, no decimal) 10 Budget Status Green Budget Comments On budget Schedule Status Green Schedule Comments On schedule Project Update Project update Activities In Progress Activities In Progress Activities Completed Activities Completed Hot Issues Hot Issues	Internal Issues Internal Issues Permit Comments Permit Comments Community Concerns Community Concerns Utility Comments Utility Comments Technology Comments Technology Comments Other Pertinent Information Other Pertinent Information Groundbreaking Date 11/18/21 Ribbon Cutting Date 2/15/22 Next Community/SIT Meeting 6/22/21
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- Save the record when complete.



Procurement Status Section

The Procurement Status section is to be used for planning, tracking, and reporting Procurement Requests as they progress through to award.

Enter planned procurements as the project scope is defined to manage planning or enter the procurements as they are requested.

Each procurement should be entered as its own row and edited as required to track the progress from beginning to end.

Reports are generated using this information and used to prioritize and manage procurements at the Project, Program, and Portfolio levels.

Note – Coordinate with your EPM for any Program specific instructions on use of the Procurement Status fields and to ensure that Priority and Ranking are managed at the Program level.

1. In the Edit mode, use the **Create New** button (red box) to create a row for each planned or in-progress Procurement Request. You can also use the arrow button on the left of each row (blue box) and select “Edit” to edit, or add, information to an existing row.

Procurement Type	Procurement Status	Procurement Request Submitted	Need-by Date	Requisition Number	Solicitation Posted	Solicitation Number	Pre-Proposal Conference Date	Proposals/Bids Due	Awarded Date	Contract Specialist	Priority	Ranking	Notes/Comments
Other: Consultant (Project Related)	Planned	3/11/21	4/30/21	RK99999901	6/18/21	DCAM-CS-99-0001	6/30/21	7/5/21	9/17/21	TBD	Red	1	Notes/Comments

2. Enter the information into each corresponding field. Use the tool tips if you are unsure of what to enter in a field. Click the Add button to add the row once you have filled out the information or click Add & New to save the current row and add a new Procurement.

3. Save the Project Information record when complete.

- 4. You can add supporting documentation as attachments, reference other project records in ProjectTeam, or assign Action Items specific to each procurement using the links in the **Related** field within each row. You will need to create the row(s) in the collection and save the record for these options to appear.

Procurement Type	Procurement Status	Procurement Request Submitted	Need-by Date	Requisition Number	Solicitation Posted	Solicitation Number	Pre-Proposal Conference Date	Proposals/Bids Due	Awarded Date	Contract Specialist	Priority	Ranking	Notes/Comments	Related
Other Consultant (Project Related)	Planned	3/11/21	4/30/21	RK99999901	6/18/21	DCAM-CS-99-0001	6/30/21	7/5/21	9/17/21	TBD	Red	1	Notes/Comments	0 0 0