PORTFOLIO AND PROJECT MANAGEMENT (PPM)

Enabling Change. Expanding Possibilities.
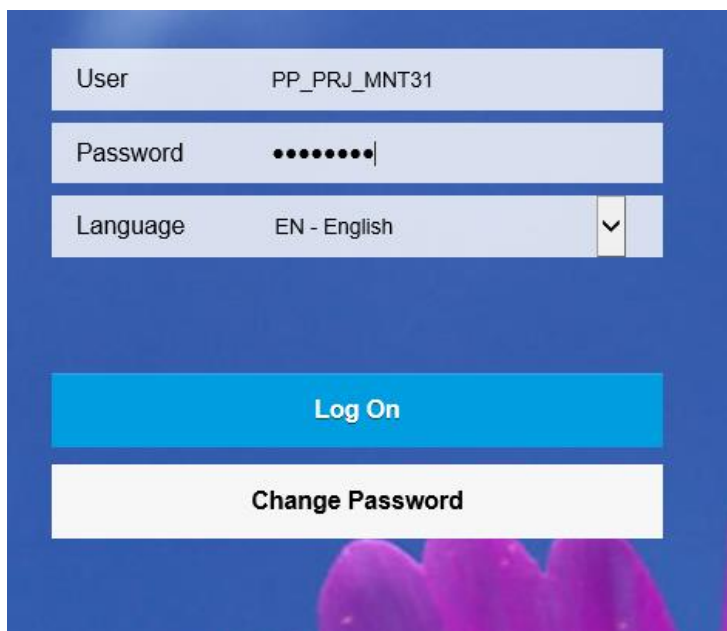
UN-Habitat PPM Job-Aid
October 2018

A. Create a Project (or Programme) log frame in SMA

1. Login to SMA

❖ Use the link below to log-in (note that after go-live, you will log-in through the regular Umoja interface)

https://gwr.umoja.un.org/sap/bc/ui5_ui5/ui2/ushell/shells/abap/FioriLaunchpad.html

❖ Enter user name and password that you've been assigned (see 'Login IDs' file) (note that after go-live, this will be your usual Umoja login ID)
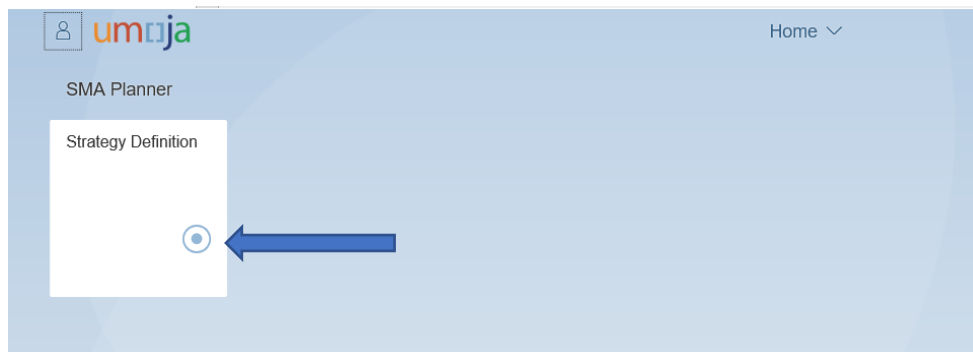

❖ Click on the "**Log on**" button.
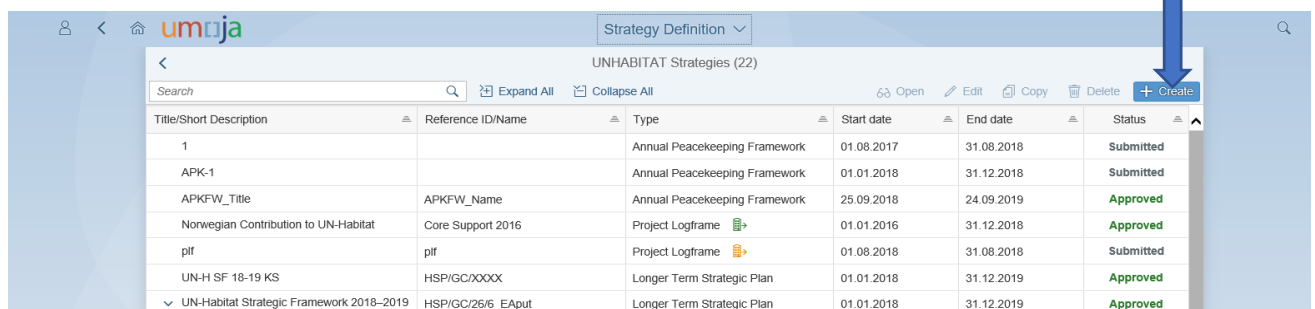
The below landing page comes up:
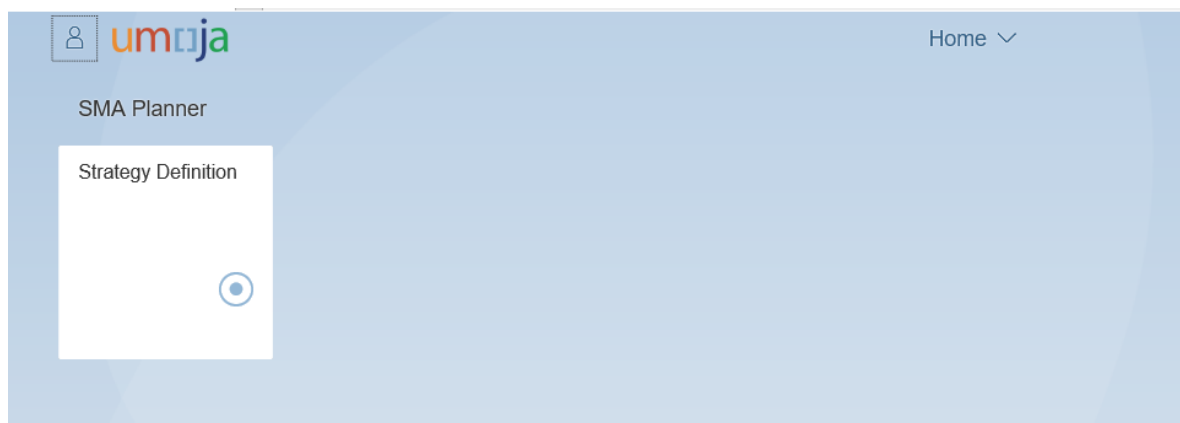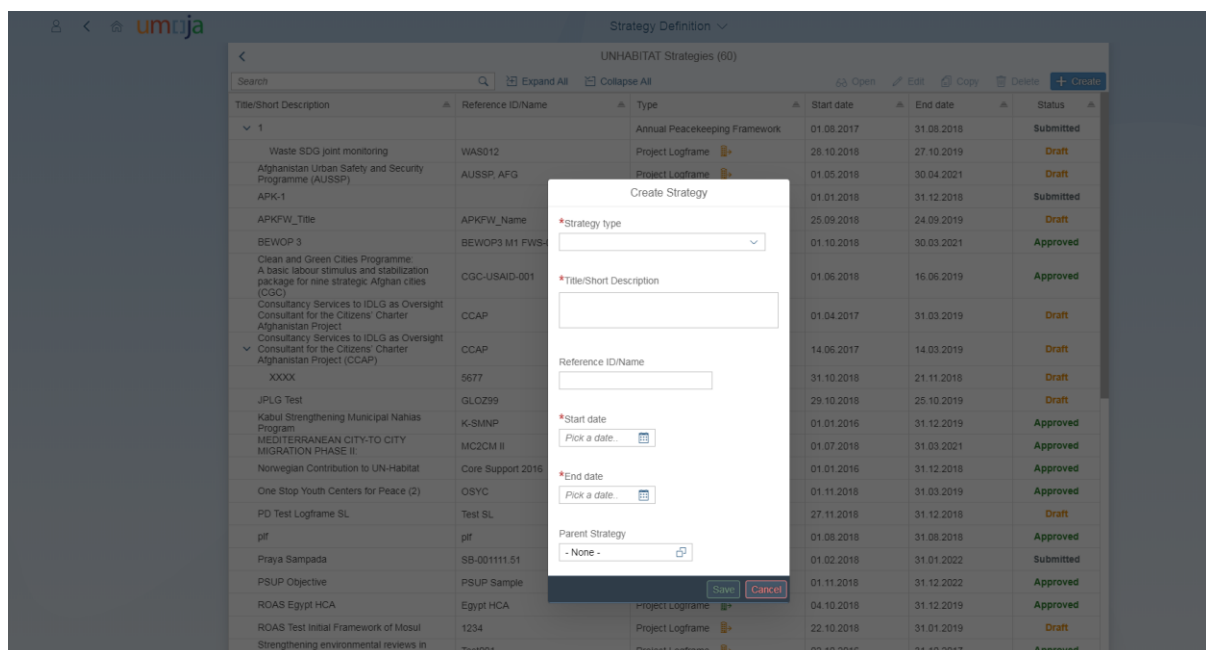
2. Create a Project/Programme Strategy in SMA

❖ Select the '**Strategy Definition**' App

❖ Click on the '**+ Create**' link on the top right of the screen


The below page comes up:

❖ Select **'Strategy Type'** from the drop-down list

Annual Peacekeeping Framework, Cost Recovery Framework and Programmatic Implementation Plan – These are not relevant to UN-Habitat

Longer Term Strategic Plan – Select this to enter the Logframe of a Programme where the Programme will be implemented by multiple projects.
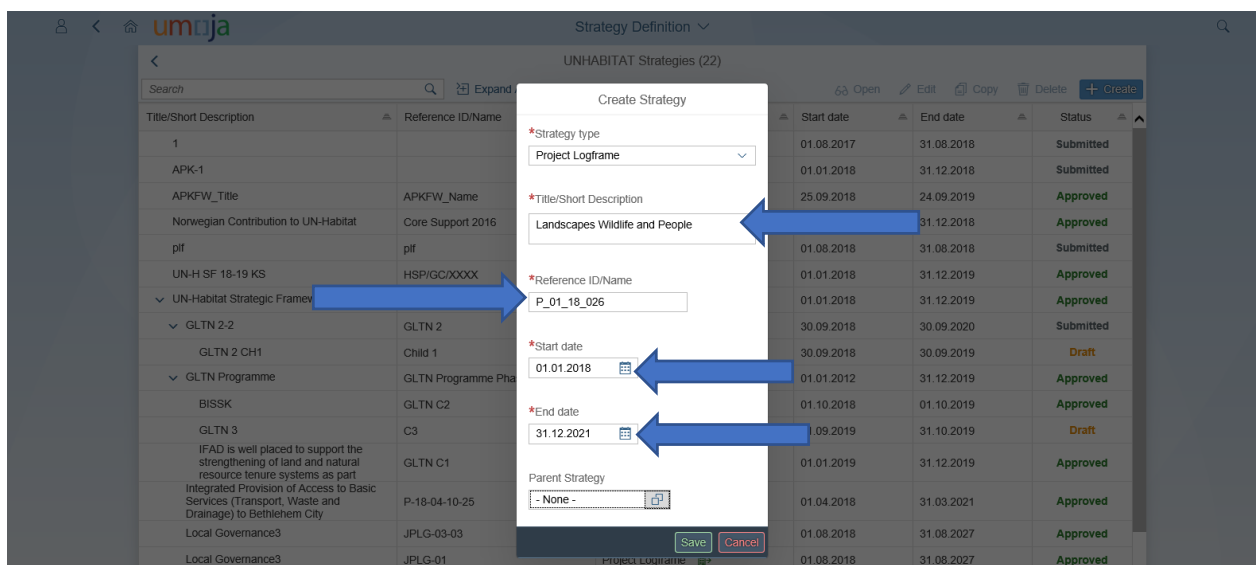
Project Logframe – Select this to enter the logframe of stand-alone Projects.
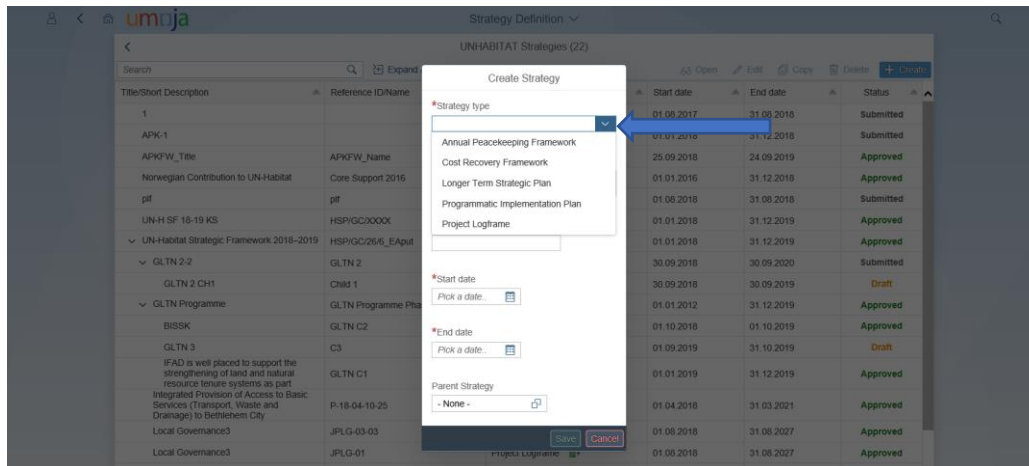
❖ Enter the name of the Project in the **'Title/Short Description'** box. For example, "**Landscape Wildlife and People**".

❖ Enter the **'Reference ID/Name'**
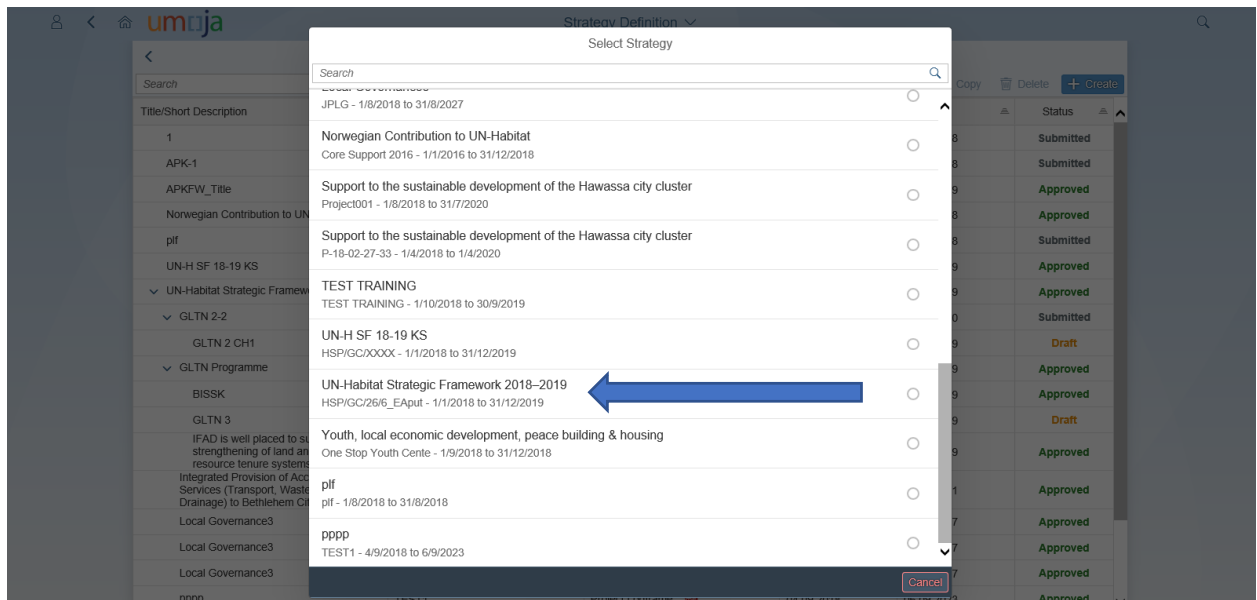The Reference ID is the 'PAAS Code' for the Project, for example: P-17-01-12-49

❖ Select the project **Start date** and **End date.**

❖ On the "**Parent Strategy**" click and select **UN Habitat Strategic Framework 2018-2019.**
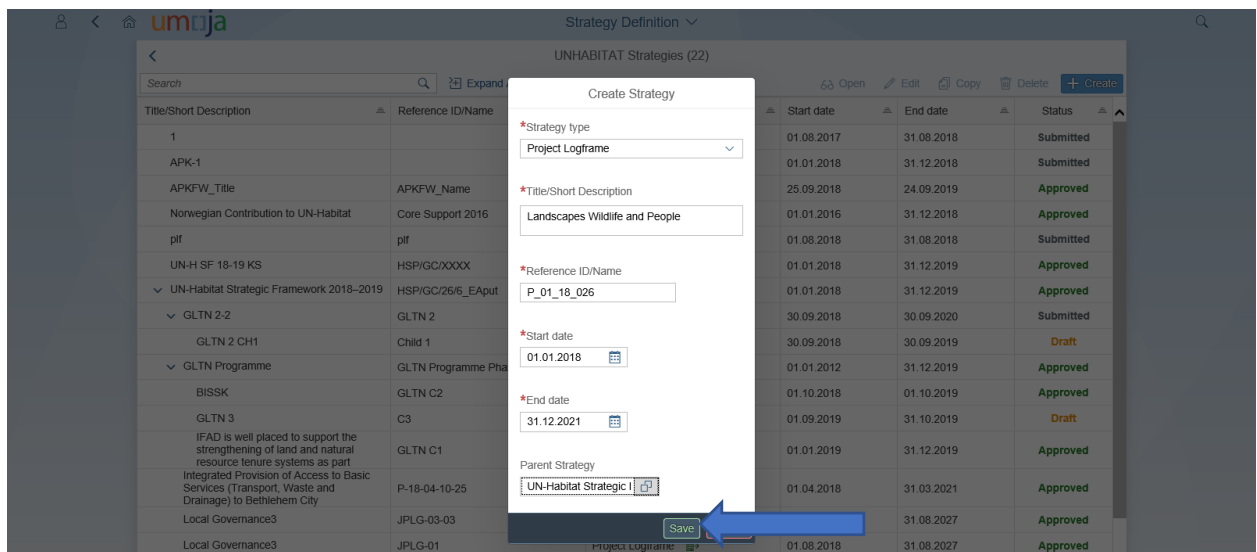**NOTE:**

➢ If creating the logframe of a Programme or logframe of a stand-alone Project; you should select the UN-Habitat Strategic Framework

➢ If creating the logframe of a 'child project', that is, a project that is supporting the implementation of an existing Programme created as 'Long Term Strategic Plan'; you should select the Programme from the drop-down. This allows the Expected Accomplishment of the Programme to be available to the Project for tagging later on in the process
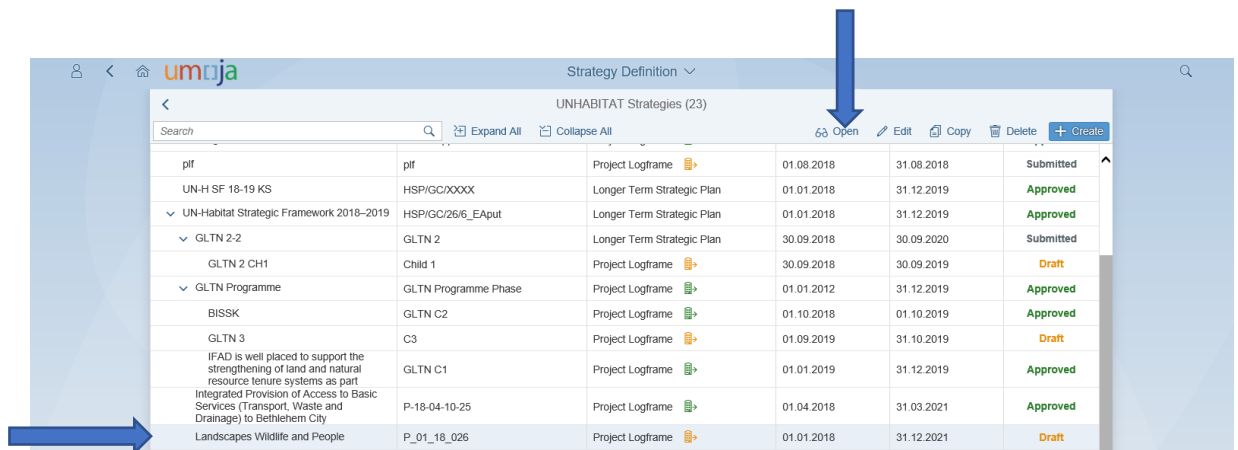
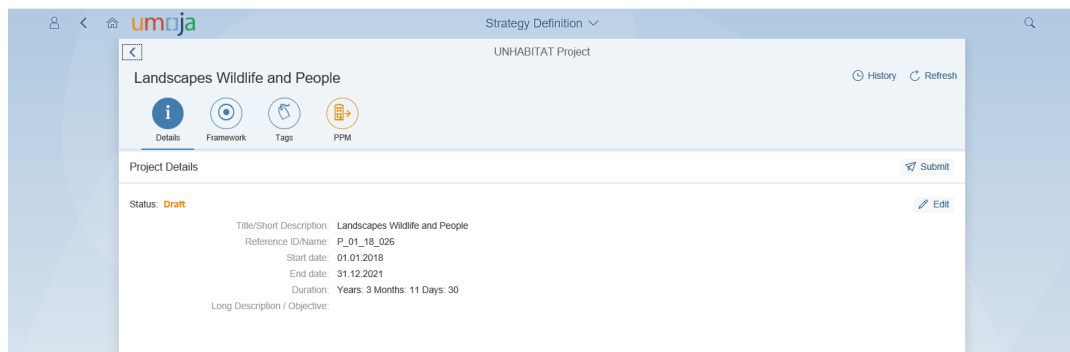❖ Click on the **Save** button.

The below page comes back up

❖ Select the **project or programme** just created.

❖ Open the Strategy by clicking the '**Open**' button from the menu on the top (the **glasses icon**).

The below page comes up

❖ On the "**Details**" tab, click on the '**edit pencil'** to enter the Long Description / Objective

Enter the Long Description of the Project.

❖ Click on the **Save** button (at the bottom right corner of the screen).

3. Add the Project/Programme Logframe details to the Strategy
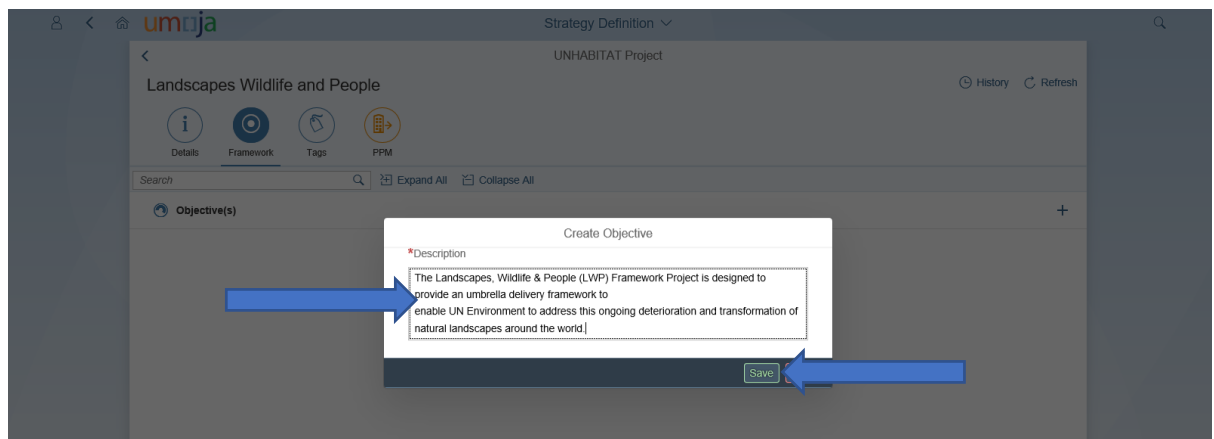
❖ Click on the "**Framework**" icon.

Add Project Objective

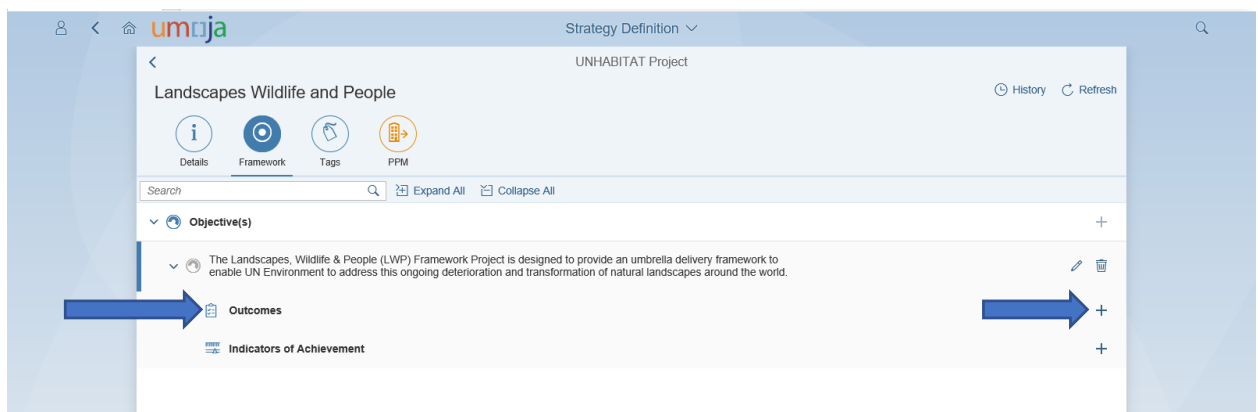❖ Click on the **Create** button "**+**" on the top right corner.
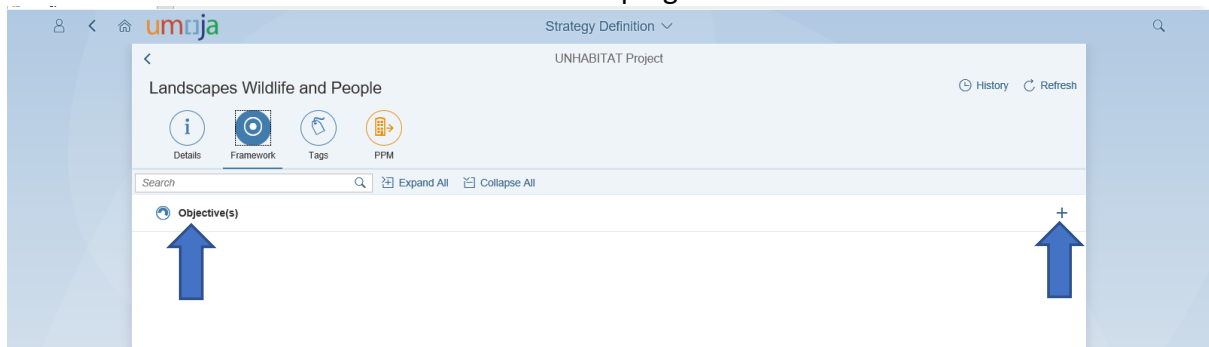
❖ Enter the **description for Objective.**
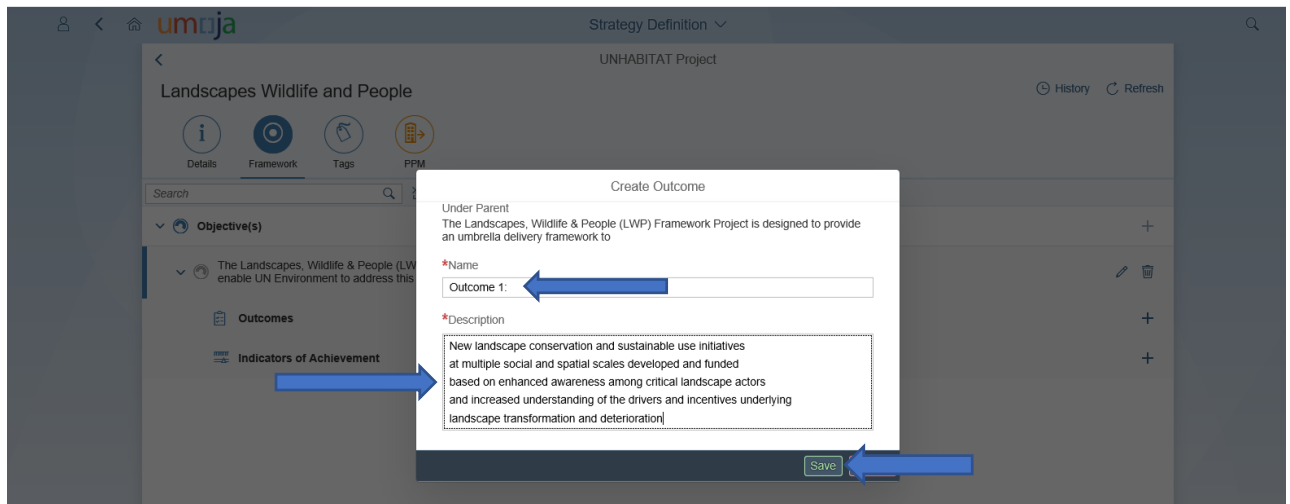❖ Click on the **Save** button.

Add Project Outcomes

❖ Click on the "**+**" sign next to the **Outcomes** menu.
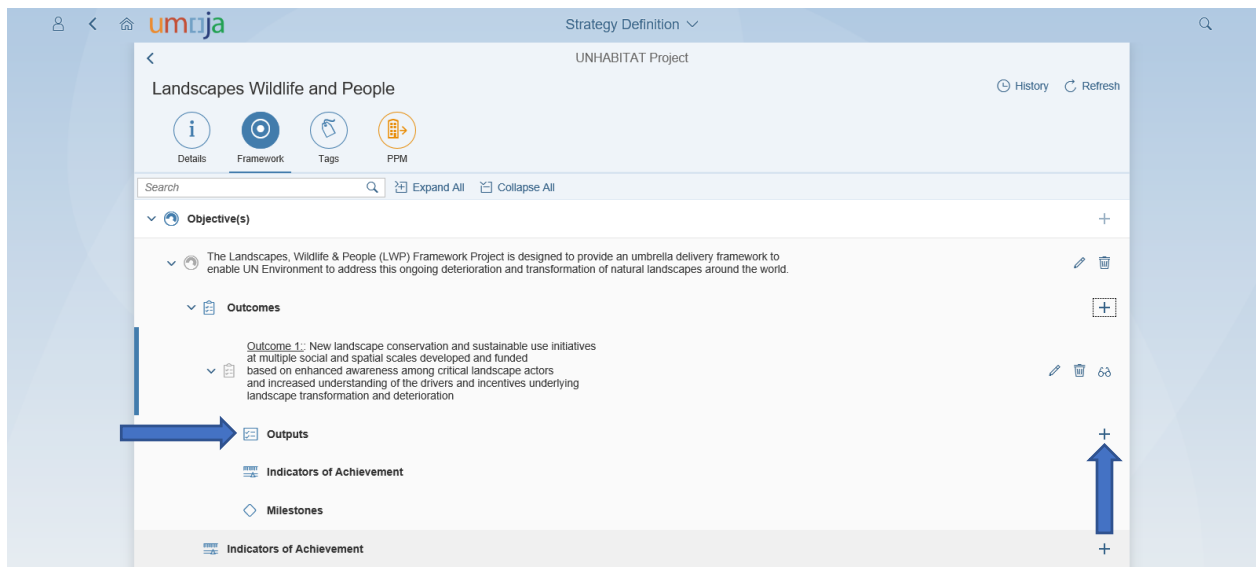
❖ Enter the **Name** and **description.**

❖ Click on the **Save** button.
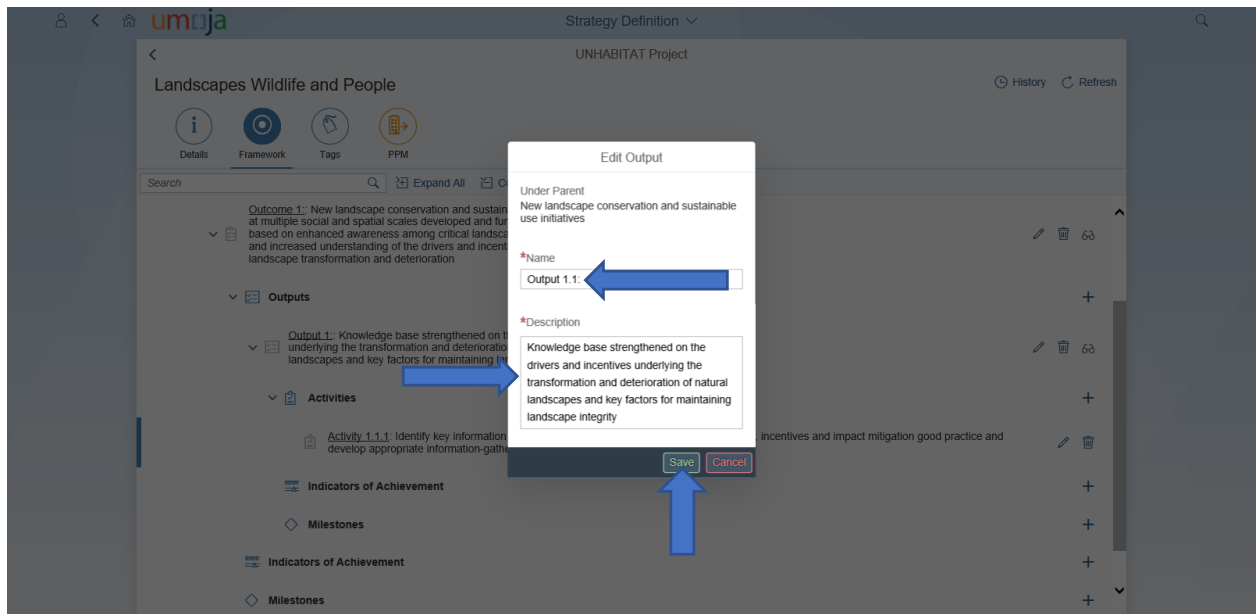

Add Project Outputs

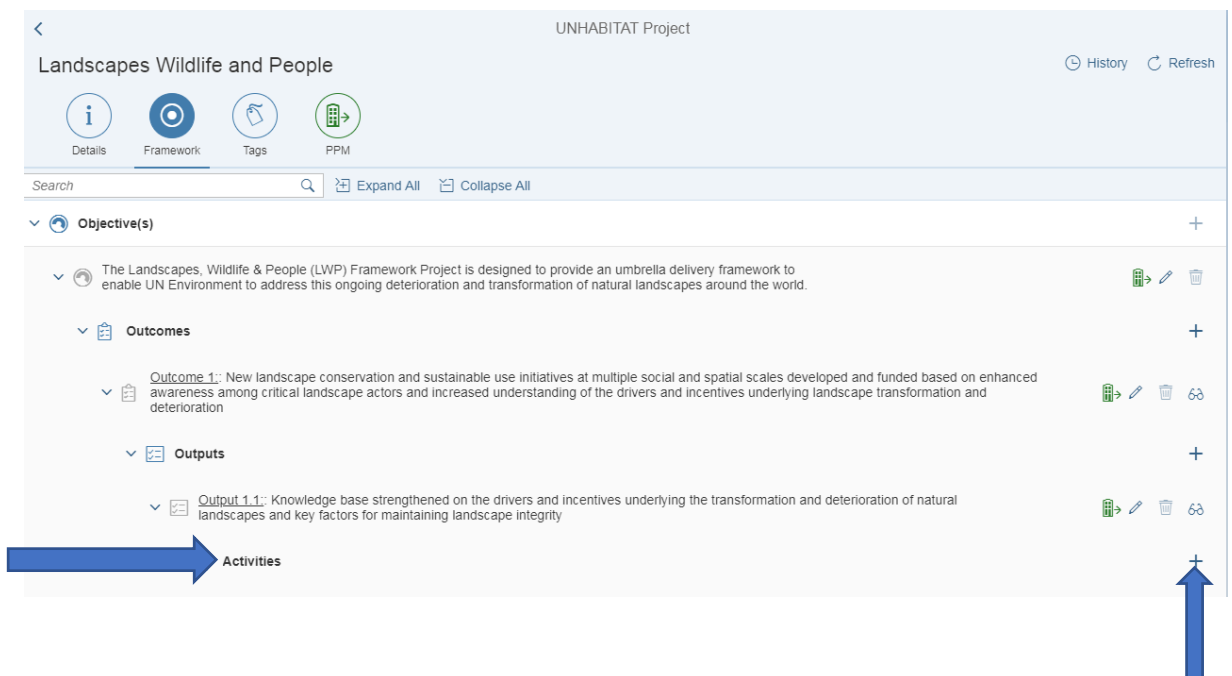❖ Click on the **"+"** sign next to the **Outputs.**

❖ Add **Name and** D**escription.**
❖ Click on the **Save** button.

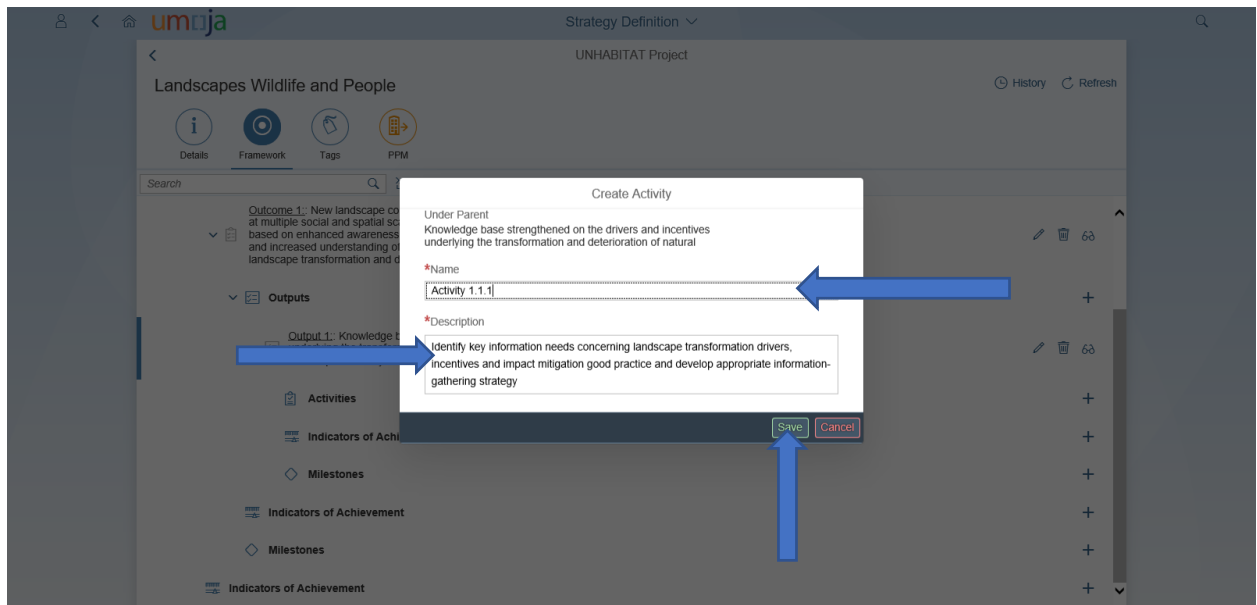**Add Project Activities**

❖ Click on the **"+"** sign next to the **Activities.**

❖ Add **Name and Description.**
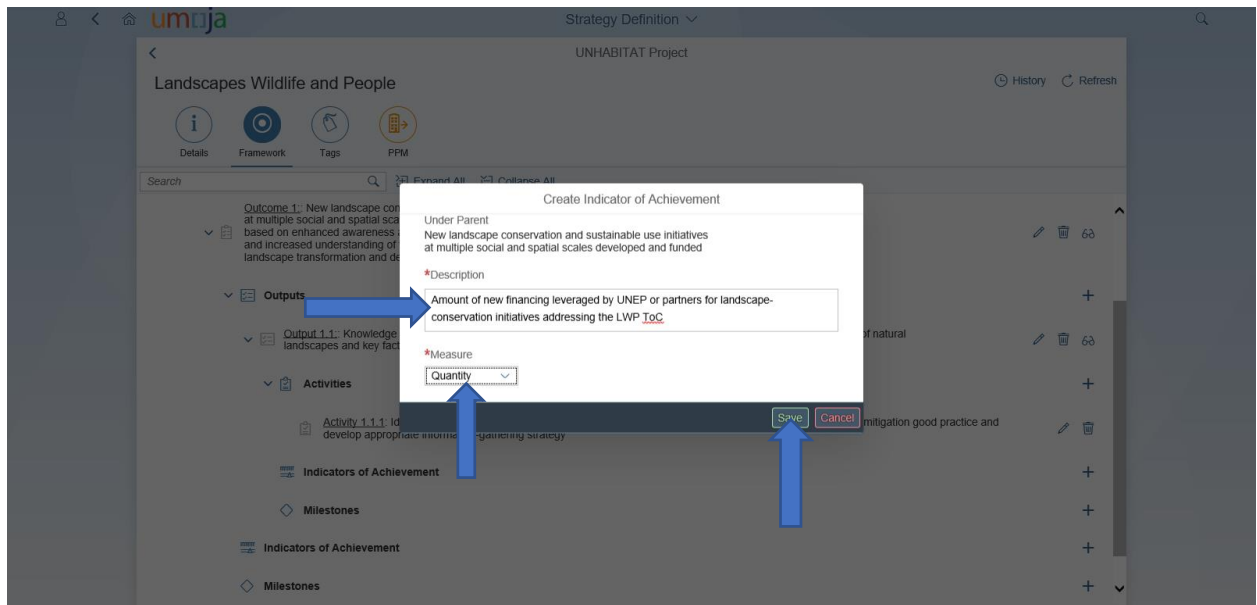❖ Click on the **Save** button.

Add project indicator of achievement

❖ Click **"+"** sign next to the Indicators of achievement.
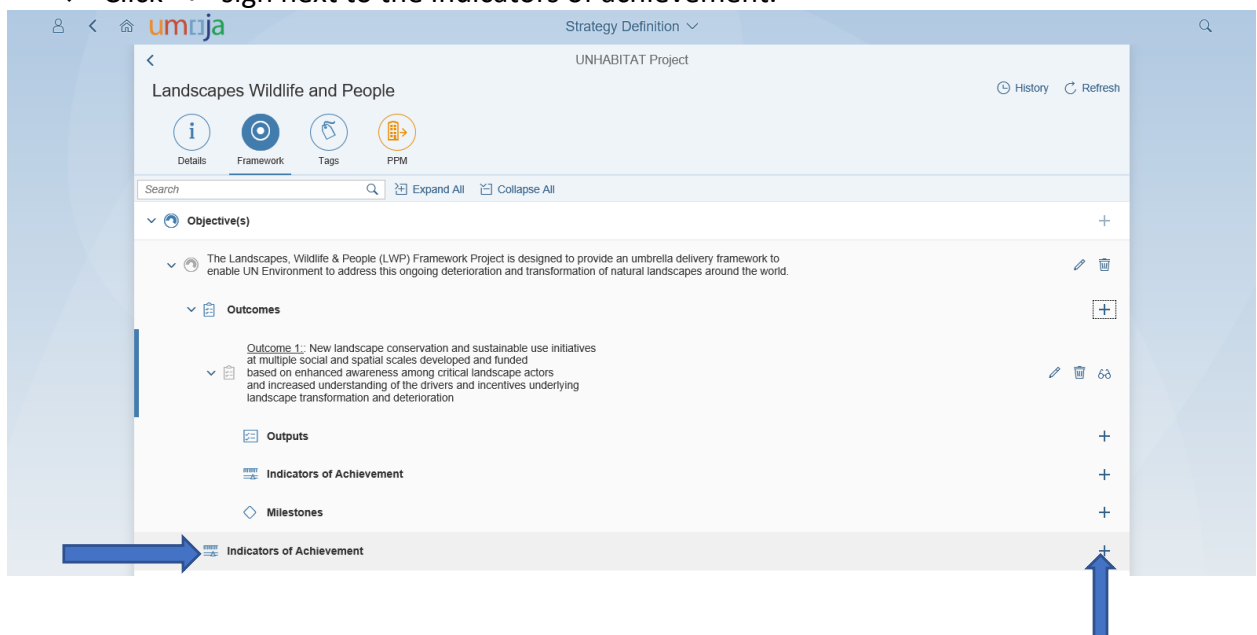
❖ Enter the **Description** and **Measure.**
❖ Click on the **Save** button.

Click on the **'Indicator of Achievement'** and click on the **'open icon'** (glasses icon)
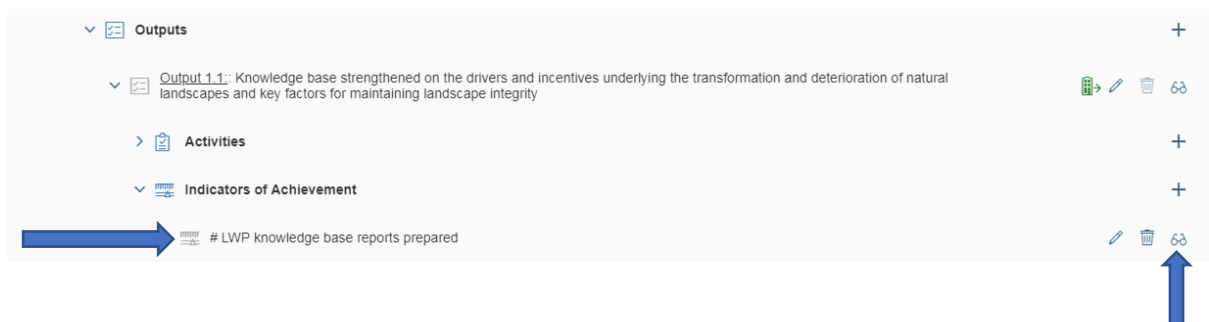
The below page comes up:

Click the **'edit pencil'** to add Means of Verification

Enter the means of verification and Click **'Save'**

Click the **'Performance Icon' to enter the Performance measure**

Click **Save**

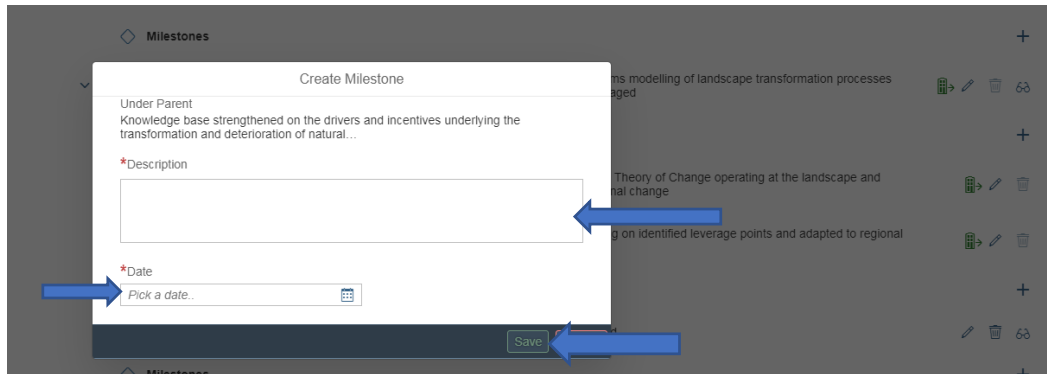The above is what you get after saving.

Add Project Milestones

- ❖ Click **"+"** sign next to the Milestones
- ❖ Enter the **Description** and **pick a date**.
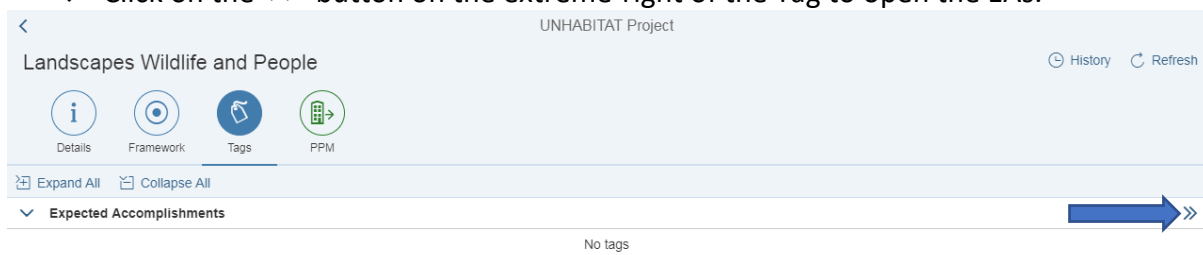- ❖ Click on the **Save** button.

Tag the Project

For the current PPM release, only Expected Accomplishments (EAs) will be available as Tags. In future release, there will be opportunity to create other Tags such as NUA, SDG, Gender markers etc.
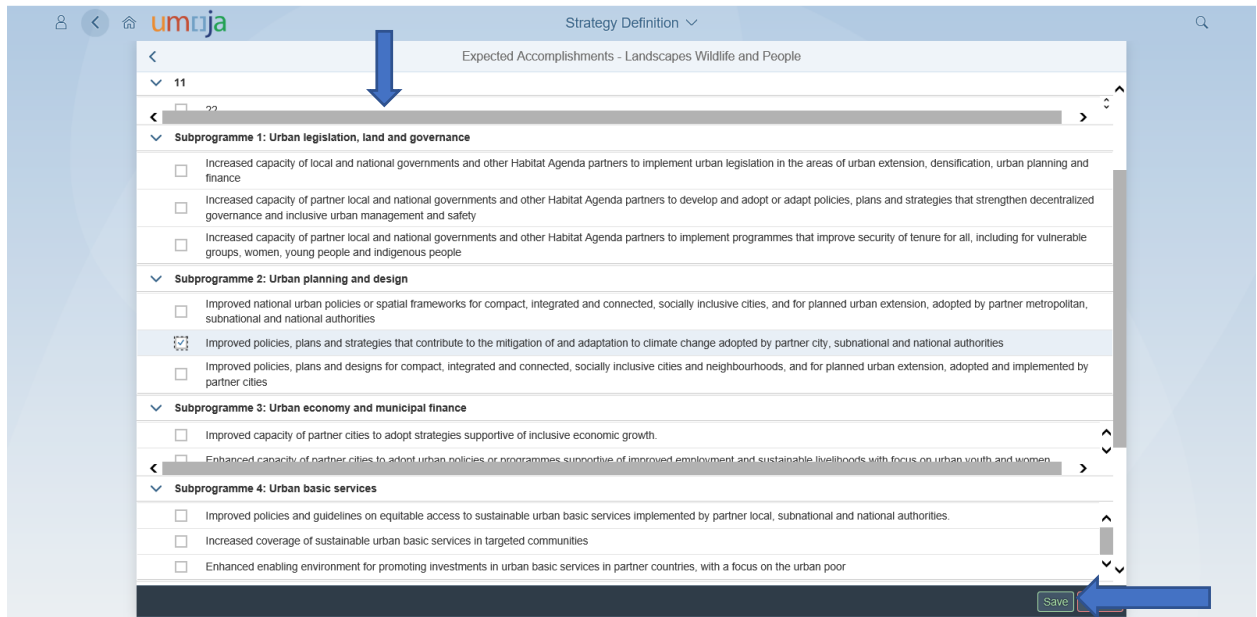
- ❖ Still under Strategy Definition, after completing the logframe entries, select the "**Tag**" icon (next to the 'Framework' icon')
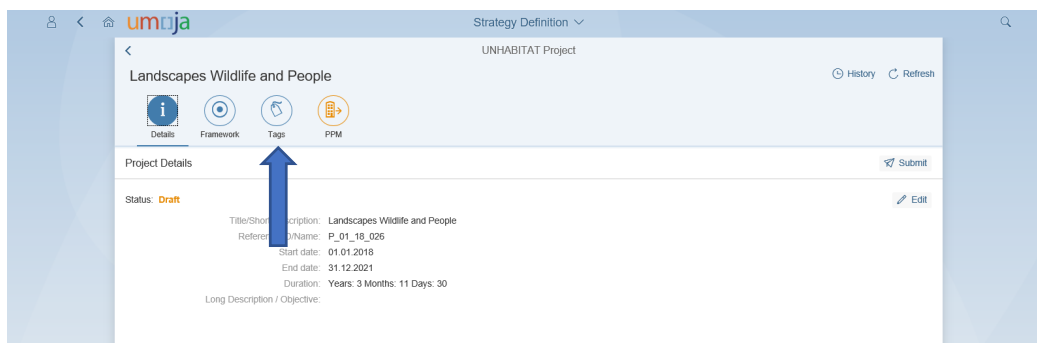
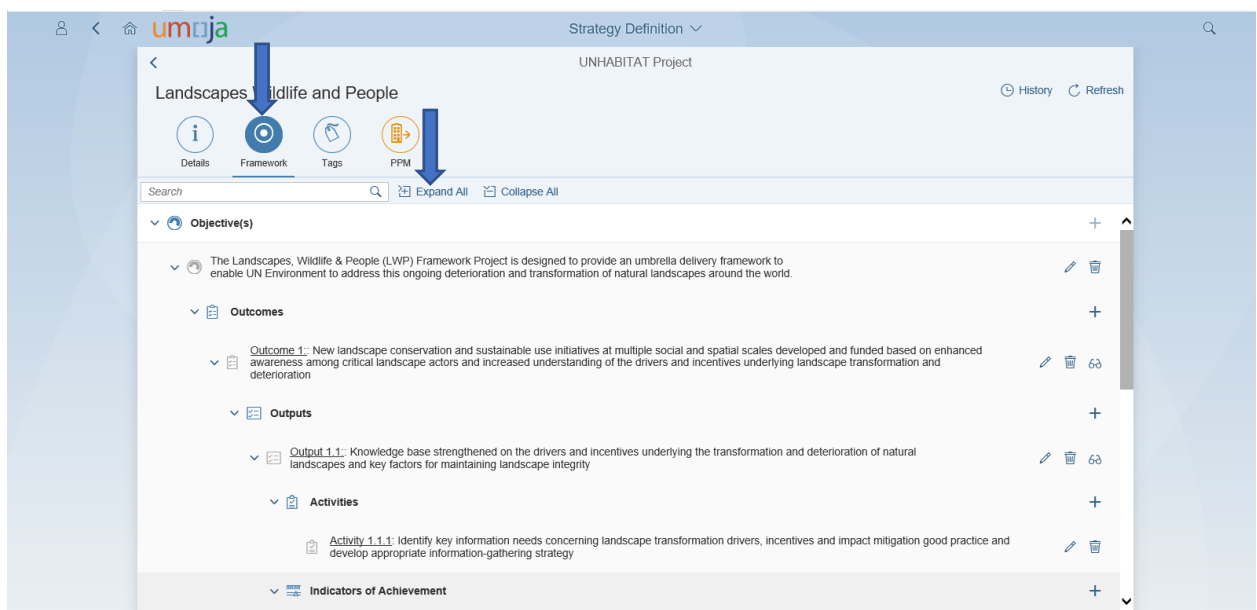- ❖ Click on the '>>' button on the extreme-right of the Tag to open the EAs.

❖ Select the **EA** related to the project.

❖ Save the selected Tag by clicking on the **Save** button at the bottom-right of the page.

Review Project logframe

❖ Click on the **Frameworks** Icon.

❖ Click on the **"+ Expand All**" to view Outcomes, Outputs, Activities, Indicators of achievement. Check for accuracy and completeness
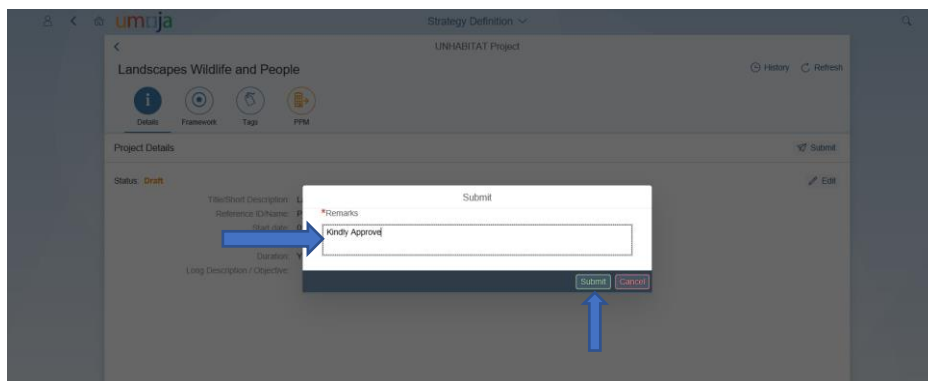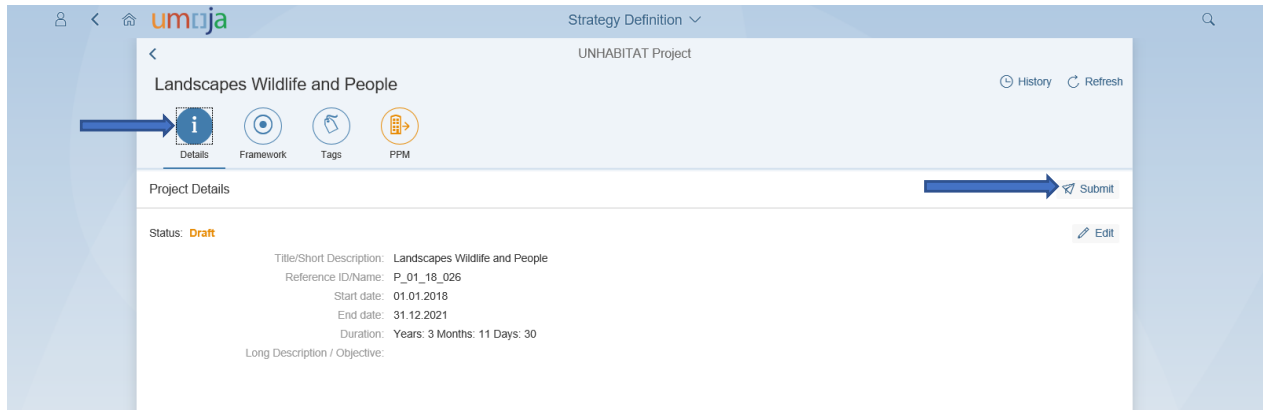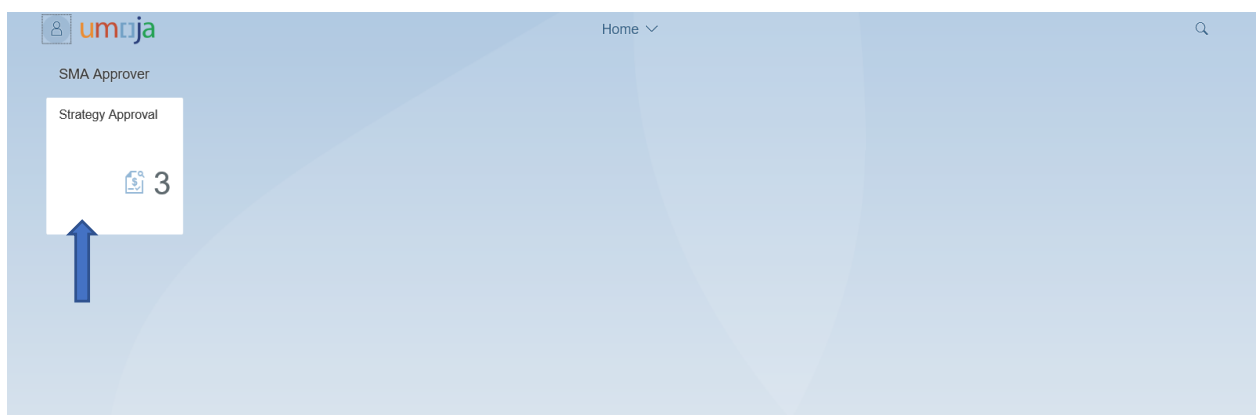
4. Submit and Approve Project Logframe in SMA

Submit a Project logframe for approval

- ❖ Click on the "**Details**" tab.
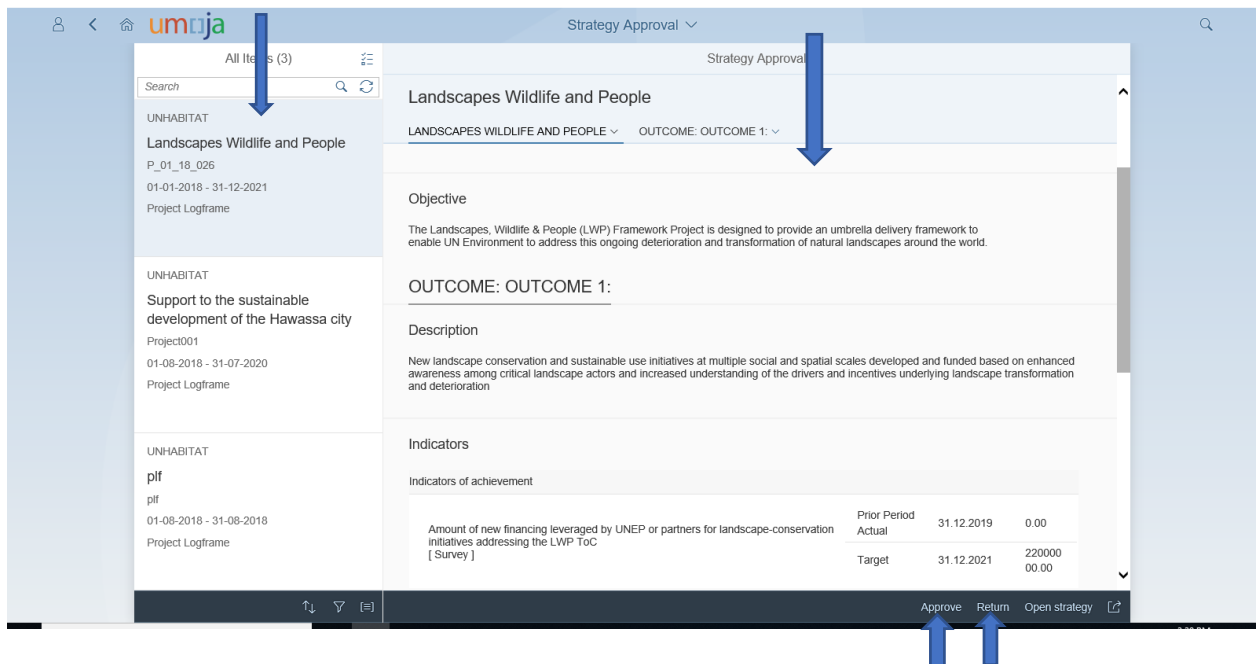- ❖ Click on the **Submit** button.
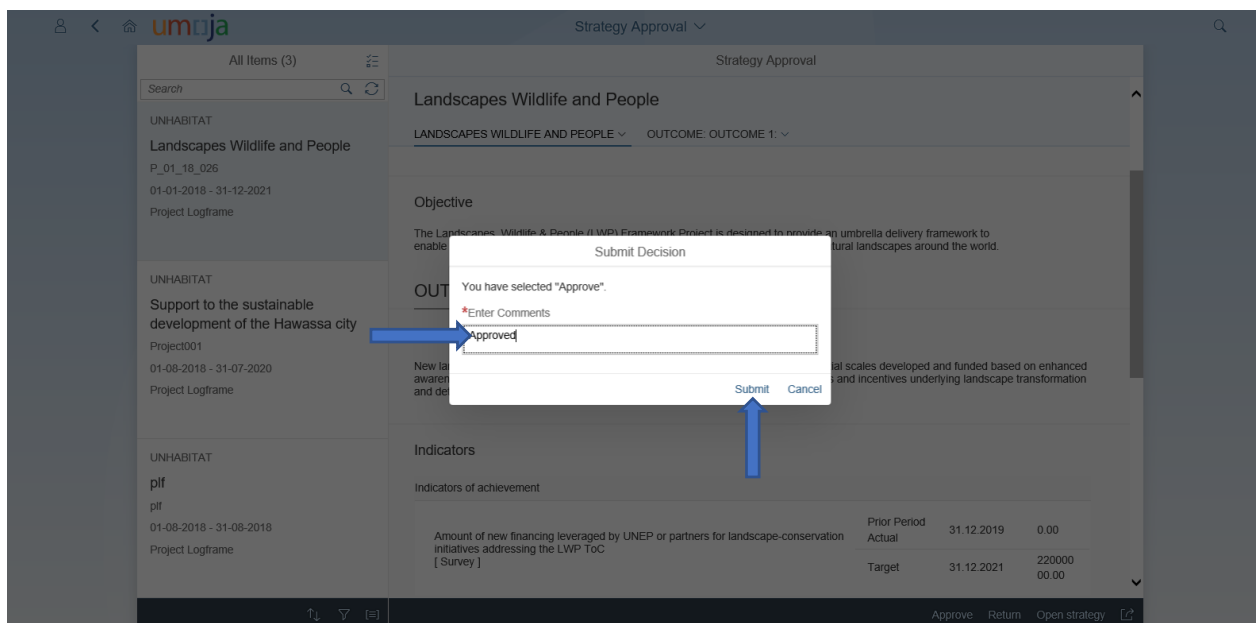- ❖ Type in **'Remarks'**

Approve a Project logframe

- ❖ Log in with SMA approval role.
- ❖ Click on "**Strategy Approval**" app.

- ❖ **Select** the Project logframe that you want to approve.
- ❖ **Review** the Project logframe and confirm Project Advisory Group approval.
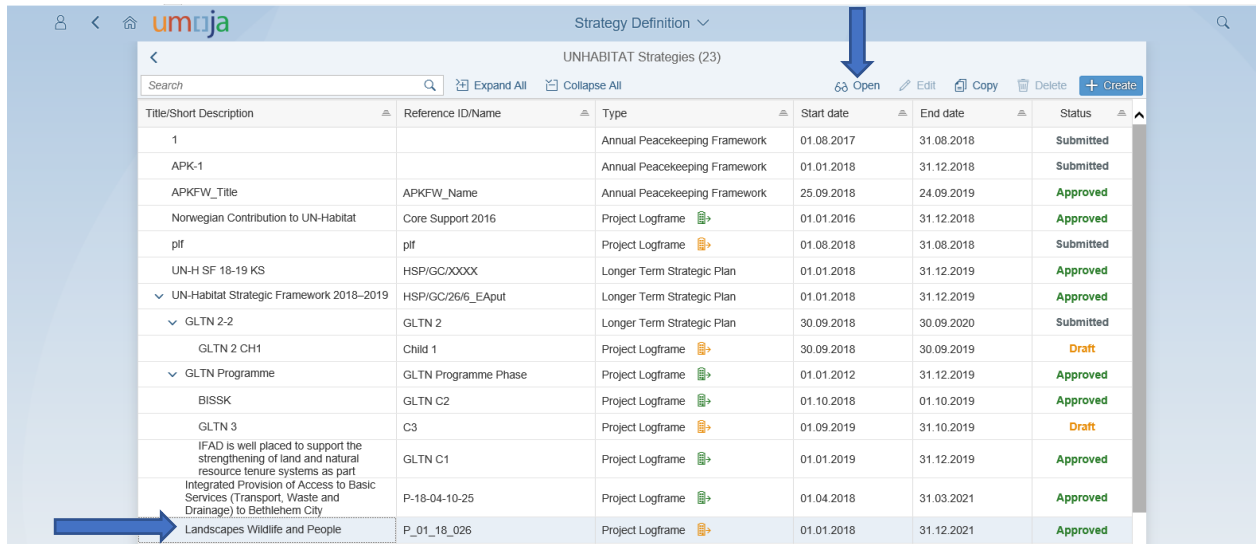- ❖ Click "**Approve**" if satisfied. Or Click **'Return'** if you require changes to be made.

- ❖ Enter Comment then click "**Submit**".

B. Push Project/Programme Logframe from SMA to PPM

❖ Login back into SMA, **highlight** the Project/Logframe to be Pushed, and click on the '**open**' button to open the approve project logframe.
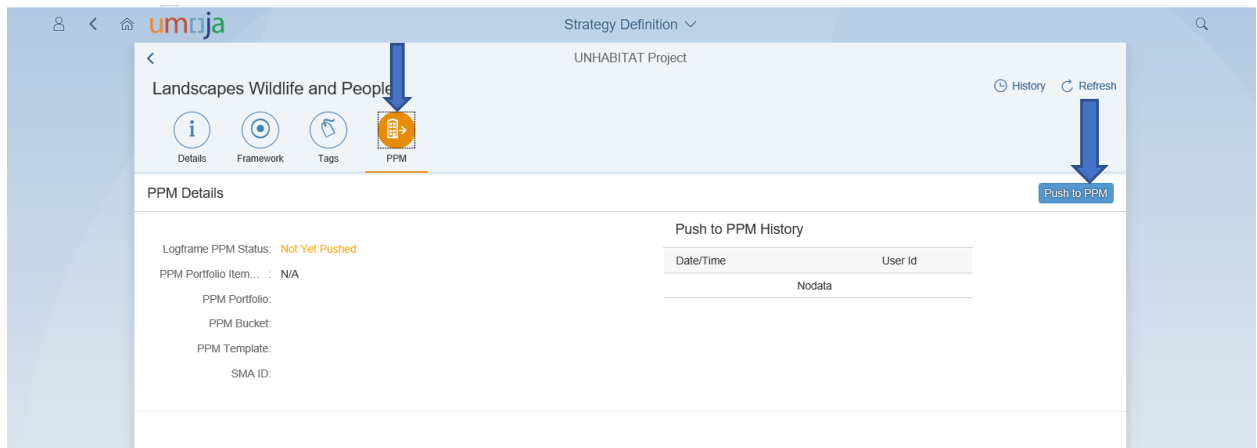

❖ When project/programme is opened, Click on the **PPM** icon.
❖ Click on "**Push to PPM**" on the top right.

The below window comes up

❖ Select the **Portfolio** and **Bucket** (Portfolio 005 and UN-Habitat as Bucket)

❖ **Select** the applicable options in the questions for Project type

UN-Habitat Project Type is 'Non-Capital'
Capital projects/programmes are projects/programmes that are capitalized as asset in the books of an organization. For example, a project to build an office building that will be owned by UN-Habitat (which we do not do). UN-Habitat usually hand-over assets acquired through projects/programmes to beneficiaries, donors or host government.
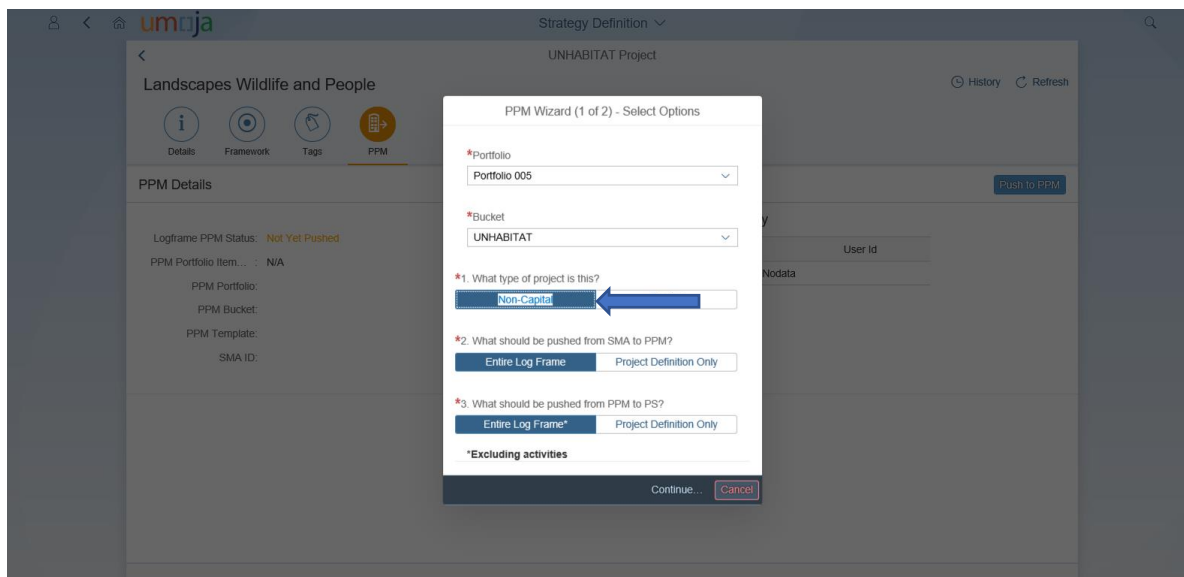
- ❖ **Select** the applicable options in the questions 'what should be pushed from SMA to PPM

  The option on what to Push from SMA to PPM is the decision of the Project Manager. It should be informed by how the Project Manager wants to breakdown the project to support the implementation, the donor reporting requirements, the nature of the project, the project budget.

  Note that the levels pushed to PPM is the levels that will be available in PPM to be pushed to PS (for example, if 'Project Definition Only' is pushed; only one level will be available to be pushed to PS from PPM.
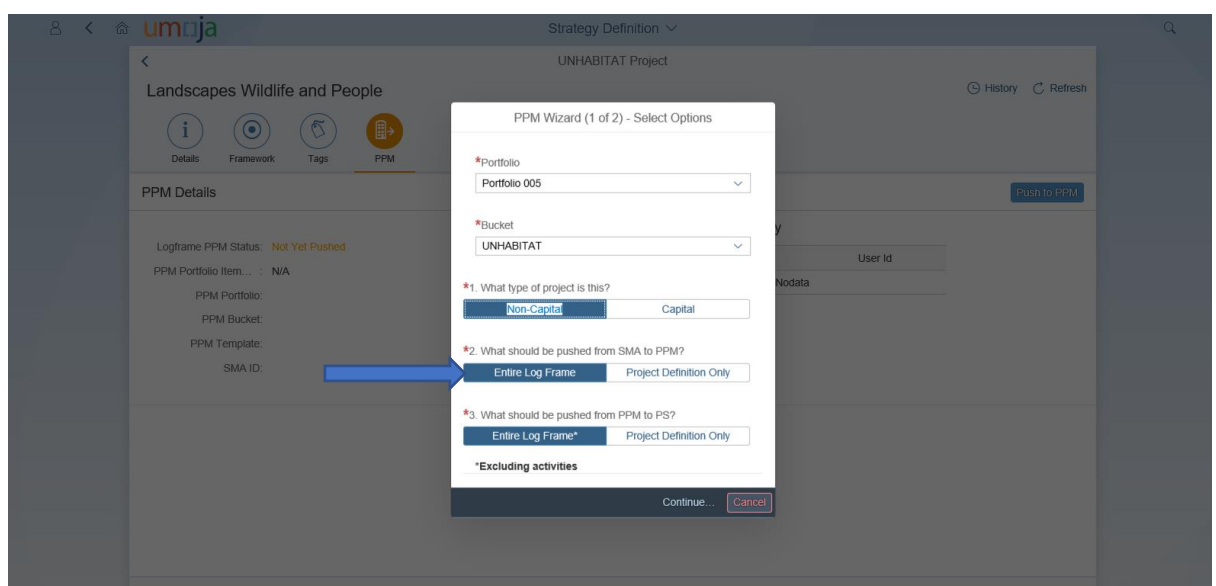 *For simple projects, it is recommended to push entire logframe to PPM.*

❖ **Select** the applicable options in the questions 'what should be pushed from PPM to PS
The option on what to Push from PPM to PS is the decision of the Project Manager. It should be informed by how the Project Manager wants to breakdown the project to support the implementation, the donor reporting requirements, the nature of the project, the project budget.
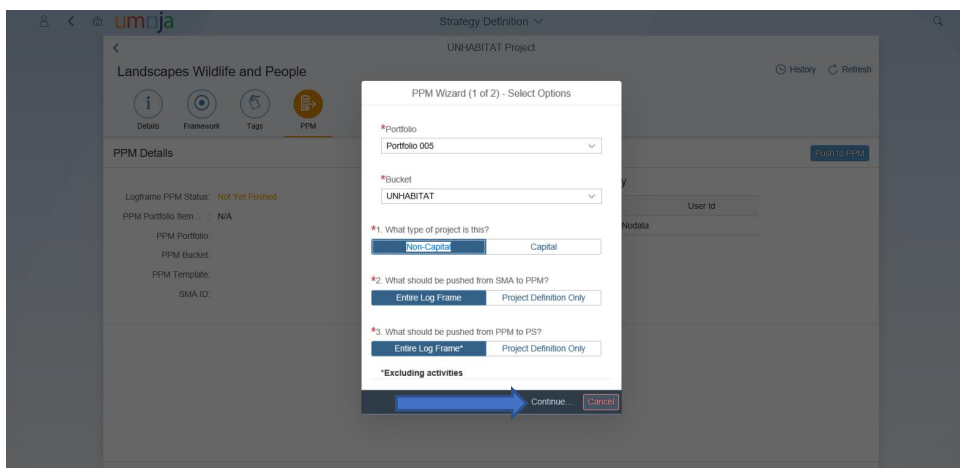
The levels available to be pushed from PPM to PS is dependent on the levels pushed from SMA to PPM
However, please note that the 4th level of the logframe will be excluded and not pushed to PS from PPM and will need to be recreated in PS.
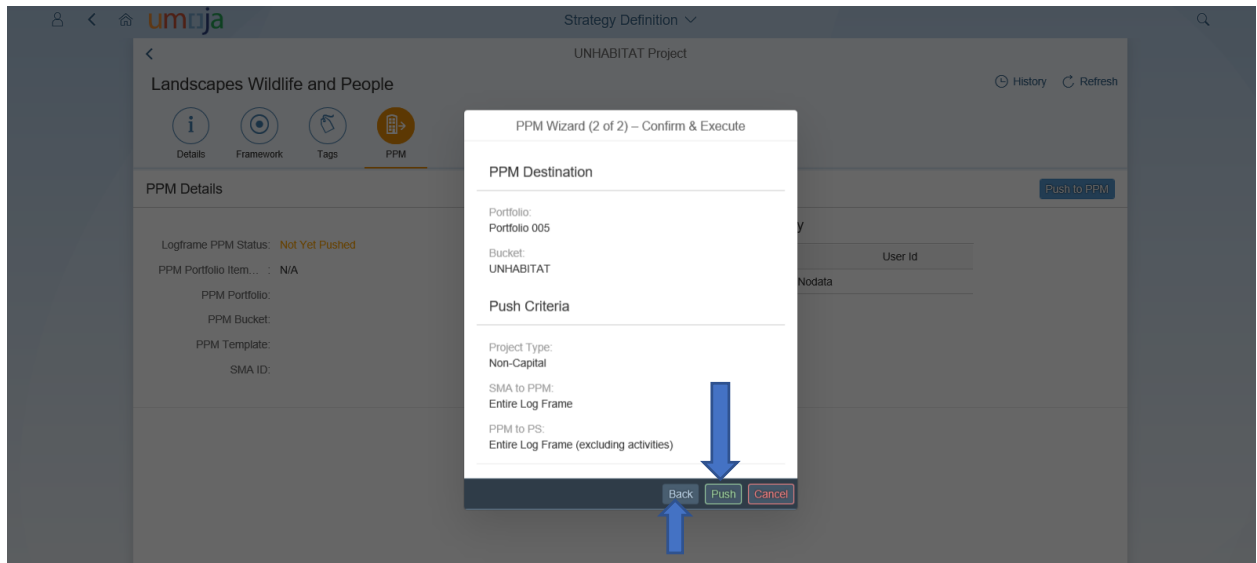
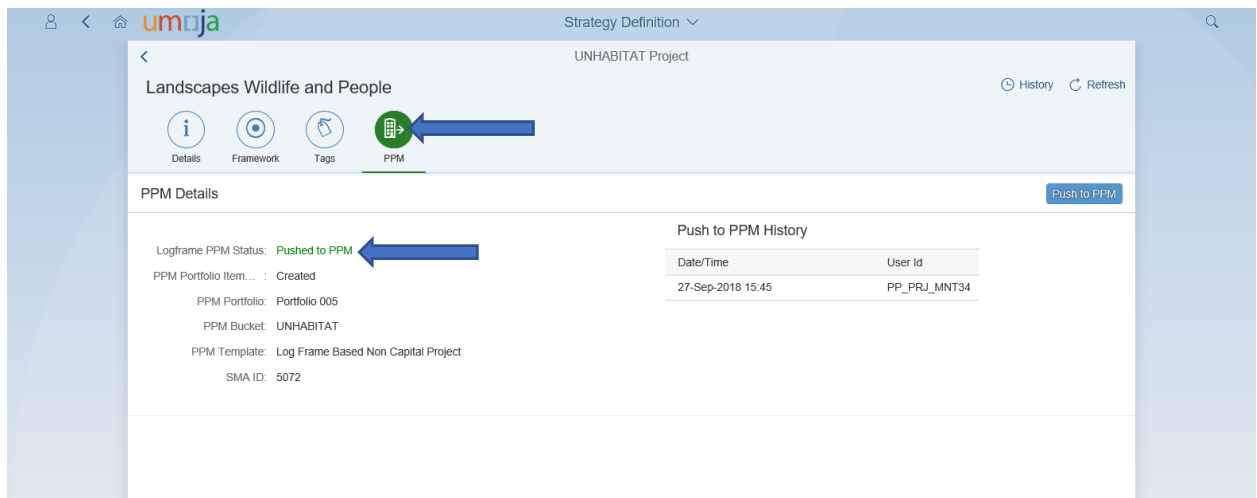*The 4th level can be used by the Project Manager as deemed necessary to support financial reporting.*
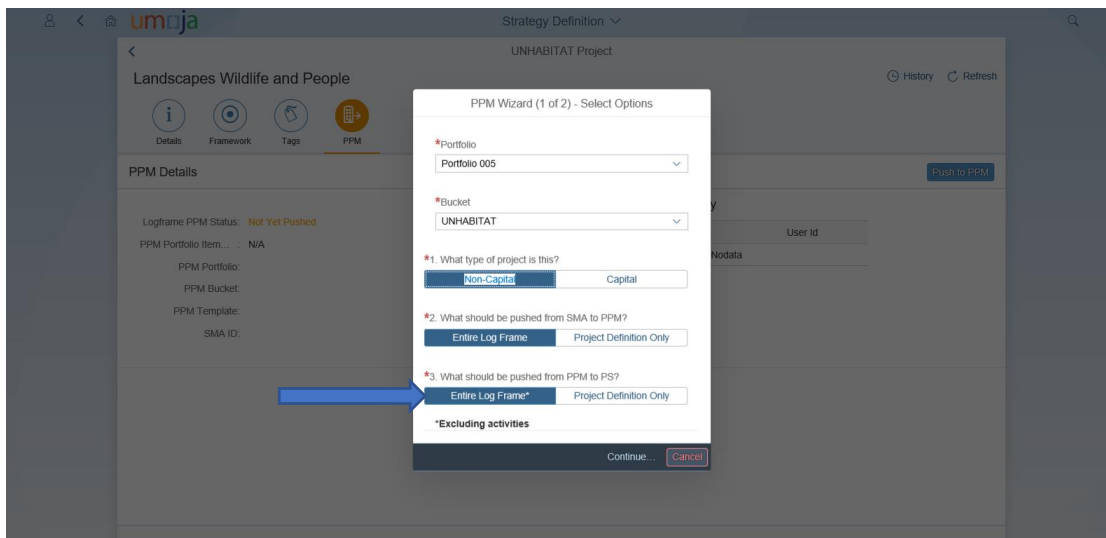
❖ Click on the "**Continue**" button.

❖ Click "**Push**" to push to PPM. If you want to amend anything, choose "**Back**" button.

❖ Confirm Project/Programme Logframe has been pushed to PPM
The Orange PPM icon changes to Green and the Status indicates 'Pushed to PPM'

C. Portfolio Project Management (PPM)

1. Login in to PPM

❖ Login to PPM using the Instruction and ID that was distributed to you. Login first to regular Umoja with your personal user name and ID, and select Non-Production Portal, and change the URL to:
http://unsapr5japp1.umoja.un.org:50000/irj/portal

2. Enrich PPM with the minimum requirements

❖ In the main screen after login, click "**Portfolio Management**" tab. And Select "**Portfolio Items**" in the menu on the left side of the screen.
Portfolio Items refers to Projects.

❖ Click on the Item with the 'Reference ID/Name' that you had entered in SMA when creating the project/programme Strategy.
The Reference ID is the 'PAAS Code' for the Project, for example: P-17-01-12-49

❖ When the Item is open, click "**Project**", and select "**Task**" from the drop-down.

Item: P_01_18_026

Portfolio 005 > Portfolio_Bucket 005 > UNHABITAT > P_01_18_026

5072 Called From Portfolio Portfolio 005 Name P_01_18_026 ID 5072 PS Project ID

✔ Concept → 📝 Draft → Review → Implementation → Closing

No Messages – Display Message Log

Save | Close | Read Only | Refresh | Reporting Cockpit | Financial and Capacity Planning ◢ | Print Fact Sheet | Project ◢ | Timeline Monitor   You can also ◢

Overview | Phases and Decisions | Relationships | Miscellaneous

General Information | Classification | Capacity Information

Help

Key Information

Name:	P_01_18_026	ID:	5072
Status:	Created	Type:	Log Frame Based Non Capital Project
Priority:	▾ 🚫		

Description:
Landscapes Wildlife and People
The Landscapes, Wildlife & People (LWP) Framework Project is designed to provide an umbrella delivery framework to enable UN Environment to address this ongoing deterioration and transformation of natural landscapes around the world.   [Upload Image]

Dates

Planned Start/Finish:	01.01.2018 / 31.12.2021
Actual Start/Finish:	📅 / 📅
Days Left Until Finish:	1,191

Days Left Until Next Decision: 0

PS Project ID

PS Project ID:

Save | Close | Read Only | Refresh | Reporting Cockpit | Financial and Capacity Planning ◢ | Print Fact Sheet | Project ◢ | Timeline Monitor   You can also ◢

Project: P_01_18_026

Additional Information on Resources Help

5072 Level of Severity ◇ No Value Set   Status Created   Responsible

No Messages – Display Message Log

Save | Close | Edit | Item | Create Version ◢ | User Settings...

Structure | Resources | Accounting | Project Versions | Search

Detail | Table | Graphic

P_01_18_026

Checklist   Create | Include | Delete | Schedule | Add to Favorites ◢ | Copy to Forecasted ◢   Language: English ▾

Project Element	Severity
▾ △ P_01_18_026	◇
▾ ⊘ Implementation	◇
▾ ♡ Project Structure	◇
▾ ○ Outcome 1:	◇
▾ ○ Output 1.1:	◇
• ○ Activity 1.1.1	◇
▾ ○ Output 1.2	◇
• ○ Activity 1.2.1:	◇
• ○ Activity 1.2.2:	◇

Basic Data | Dates and Work | Additional Data | PS Assignments | Portfolio Data | Notes | Documents | Object Links | Authorizations

General   Help

Name:	P_01_18_026	Number:	5072
Project Type:	Log Frame Based Non Capital Project	Reason:	
Responsible Role:	Project Manager	Responsible Resource:	
Responsible:			
Substitute:			Show Substitute Details

Description:
Landscapes Wildlife and People
The Landscapes, Wildlife & People (LWP) Framework Project is designed to provide an umbrella delivery framework to enable UN Environment to address this ongoing deterioration and transformation of natural landscapes around the world.

Dates

Start:	01.01.2018	Finish:	31.12.2021

Status

Status:	Created
Change Status:	Status Management
PS Project ID:	

Save | Close | Edit | Item | Create Version ◢ | User Settings...

The above window opens when you select 'Task'

❖ **Click** on the **Project definition** (the top node) to make available the 'PS Assignment' Tab

❖ **Click** on "**PS assignment tab**" and input the minimum requirements: '**Leading Functional Area', 'Cost Center' and 'Applicant ID'.**

❖ Click **"Save"** button.

3. Push Project/Programme structure from PPM to PS

❖ Click on **'Basic Data'** tab,

❖ Click the "**Change status**" drop down and select "**Flag for transfer**".
❖ Click on the "**Save**" button.

❖ Click on "**Accounting tab**"

❖ Click on "**Assign WBS Elements**"

The below screen comes up

D. Enrich WBS and WBSE in PS

This is the point where you enrich/enhance the WBS by creating the 4th level and enhance the WBSEs by tagging or linking to grants, geography, cost centre etc. through the 'UN Assignment' and 'Basic Data' tabs to support financial reporting

The Programme Management Officers and Programme Management Assistants are conversant with this environment and will support the Project Manager to perform these tasks as usual or train the Project Manager that wish to perform the tasks him/herself.

❖ Click the first WBSE under the second window '**PS Project'** to enhance each level of the WBS as required, starting from the Objective level.

The below screen comes up

❖ Click "**Project Builder**: **Change WBS Element**"

The below screen comes up

The arrows in the below graph indicates areas that may be required to enrich the WBS/WBSE

The Project is subsequently available for implementation after the budget release.

Please note that all current processes in PS remains the same and will need to be followed.