

Number:	08.1.3	Page:	1 of 2
Latest Version:	1.0	Revision Date:	12/13/2016
Effective Date:	03/27/2017	Replaces:	NEW
Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Fonda Logston	Reviewing Unit:	Enterprise Programs
Title:	Project File Management SOP		
Description:	This document is the operating standard for saving project-related files in Office 365 and the PPM Tool.		

Project File Management

Standard Operating Procedure

1. General Statement of Purpose

- 1.1. The purpose of this document is to outline the procedures for saving project-related files in Office 365 and the PPM Tool.

2. Scope

- 2.1. This standard applies to all OMES IS projects.

3. Discipline

- 3.1. Program Management Standards

4. Instructions

- 4.1. Whenever a project is in the Initiation phase, the Project Manager must create a project folder in the Office 365 group **IS Projects**, under the **Projects** folder.

- 4.1.1. The project folder should use the following naming convention:

Project Name – Project Number

- 4.2. Once the project folder has been created, the Project Manager should go to the following location, copy the necessary template subfolders and paste them inside the project folder by selecting them and clicking the **Copy to** button at the top of the screen.

Projects < Project Management Knowledge Area Folders (COPY ONLY) < Project Management Folder Structure

Note: Project Managers must not “move” the folders, only “copy” them.

- 4.2.1. The following is a list of the template subfolders that can be copied under the new project folder:

- Communication Management
- Cost Management
- Human Resource Management
- Integration Management
- Methodology
- Procurement Management
- Quality Management
- Risk Management
- Scope Management
- Stakeholder Management
- Time Management

- 4.3. In addition to creating the project folder on Office 365, the Project Manager must attach all project-critical documents to the project's References tab in the PPM Tool.

Number:	08.1.3	Page:	2 of 2
Latest Version:	1.0	Revision Date:	12/13/2016
Effective Date:	03/27/2017	Replaces:	NEW
Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Fonda Logston	Reviewing Unit:	Enterprise Programs
Title:	Project File Management SOP		
Description:	This document is the operating standard for saving project-related files in Office 365 and the PPM Tool.		

- 4.3.1. Examples of project-critical documents include: project proposal, high-level plan, detail plan, any documented issues, scope changes
- 4.4. When the project is completed and has passed its closing project review, PMO Support will move the project folder to the following location in Office 365's IS Projects group: **Projects < 00-Completed Projects**
- 4.5. Project Managers should move the project folders for cancelled projects to the following location in Office 365's IS Projects group: **Projects < 00-Cancelled Projects**
- 4.6. Project Managers should move the project folders for "on hold" projects to the following location in Office 365's IS Projects group: **Projects < 00-On-Hold Projects**
 - 4.6.1. These "on hold" projects should then be moved back to the Projects folder when the project resumes.
- 5. Roles and Responsibilities
 - 5.1. Project Manager
 - 5.1.1. Creates a project folder in Office 365 to store project documentation.
 - 5.1.2. Copies all necessary subfolders from the template to the project folder.
 - 5.1.3. Moves project folders for cancelled projects to the 00-Cancelled Projects folder.
 - 5.1.4. Moves project folders for "on hold" projects to the 00-On-Hold Projects folder.
 - 5.2. PMO Support staff
 - 5.2.1. Moves the project folder to the 00-Completed Projects folder when the project is complete and has passed its closing project review.
- 6. Limitation or Implementation Notes
 - 6.1. All project documentation should be saved in the Office 365 project folder structure.
- 7. References
 - 7.1. Office 365 Cheat Sheet – in Office 365's IS Projects group